

FiftyStates
NSDI: Advancing the Fifty States Initiative

Advancing Statewide Spatial Data Infrastructures
in Support of the National Spatial Data Infrastructure (NSDI)

Developing Strategic and Business Plans

March 7, 2010




Implementing Statewide Strategic and Business Plans slide 1

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Agenda

8:00 AM *Gathering, coffee and social networking*

PLENARY

8:30 **NSGIC Welcome and Agenda Review**
Bill Burgess, Washington Liaison for NSGIC

8:40 **Opening Remarks on 50 States Initiative by FGDC**
Milo Robinson, Fifty States Program Manager FGDC

8:45 **The "Class of 2010" New CAP Fifty States Grant Recipients**
Ken Shaffer, Deputy Executive Director FGDC

9:15 **Lessons-Learned: Presentation/Facilitated Discussion**
Michael Turner, AppGeo

10:00 ***** 15 Minute B R E A K *****

10:15 **Case Studies of Past Recipients of CAP "Fifty States" Grant**
Arthur Buto (Hawaii), Aimee Dubois (Maine), David Arbeit (Minnesota) & Dan Widner (Virginia)

10:50 ***** 10 Minute B R E A K *** Split into 2 Groups**

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Agenda cont.

ROOM A **Category 3 (Strategic Plan) CAP Grant Recipients and Others**
Michael Turner, AppGeo

11:00 Strategic Planning Process & Guidelines

11:40 Strategic Plan Questions/Answers

11:50 Reconvene Plenary Session

ROOM B **Category 4 (Business Plan) CAP Grant Recipients and Others**
Steve Anderson, AppGeo

11:00 Business Planning Process & Guidelines

11:40 Business Plan Questions/Answers

11:50 Reconvene Plenary Session

PLENARY **Next Steps and Wrap-Up**
Rich Grady, AppGeo

11:55 Fifty States "Next Steps"

12:20 PM Questions/Answers & Wrap-up

12:30 ***** A D J O U R N *****

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Introductions



- **Milo Robinson**, Fifty States Program Manager
- **Ken Shaffer**, Deputy Executive Director FGDC
- **Bill Burgess**, Washington Liaison for NSGIC
- **Rich Grady**, AppGeo
- **Michael Turner**, AppGeo
- **Steve Anderson**, AppGeo
- **Malcolm Adkins**, Baker
- **Scott Cameron**, Grant Thornton

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Project Support Team

Project Sponsors:

Project Contractor Team:

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Workshop for Strategic & Business Planning Process

FGDC Fifty States Program

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Congratulations 2010 Fifty States CAP Grant Recipients!

Category 3

State	Representatives
Alabama	Phillip Henderson Mike Van Hook
Alaska	Nick Mastrodicasa
Massachusetts	Christian Jacqz
Mississippi	Scott Samson
Ohio	Jeff Smith

Category 4

State	Representatives
Washington D.C.	Barney Krucoff
Hawaii	Arthur Buto
Idaho	Eric Smith
Maine	Aimee Dubois
New York	Cheryl Benjamin

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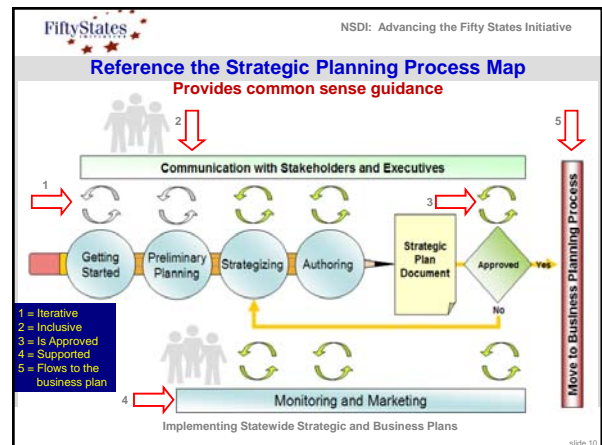
Fifty States Grant Recipients

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Lessons Learned & Common Observations on the 50 States Initiative's Strategic Planning Process

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Lesson's Learned On Contractor Involvement

- Many situations have delivered effective results:
 1. **State/GIS Clearinghouse takes lead (TX, GA, OR)**
 - Potential support by temp/academic staff
 2. **State takes lead with contractor professional *facilitation* support (VT, WI, VA)**
 3. **State divides work with contractor (MA, CO, UT)**
 - Co-authoring of documents (MA, UT)
 - State-led workshops (CO)
 4. **Contractor leads the effort (KS, NH, DC, CA, FL, ID, AR, DE, MI, AZ, WA)**
 - State provides logistical support, committee involvement and editing

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Lesson's Learned On Planning Process Governance

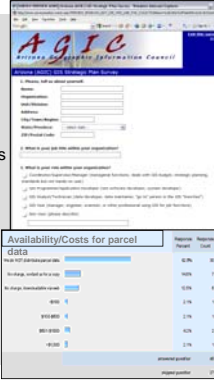
- **Who's plan is it anyway?**
 - State GIS Program's plan?
 - State Coordinating Body's plan?
 - "On behalf" of *all* GIS Stakeholders?
- **Who is managing the project?**
 - Who has final editorial control?
 - Most often, a "Strategic Plan Steering Committee"
 - **Who sits on the committee?**
 - **How big a committee?**
 - In AR, 4 (including one member from state program staff)
 - In MA, 27 (plus state program staff)

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Lesson's Learned On Stakeholder Input

- **Many potential forums**
 - On-line surveys (AZ, UT, CT, FL, MO, CA, IN)
 - Individual **interviews** w/ key stakeholders
 - **Focus groups** convened on specific topics
 - Larger, public "**stakeholder information gathering sessions**" (aka "Listening Session")
- **What info are you trying to collect?**
 - Characterize the **state of GIS** (SWOT)
 - Identify **priorities**
 - Assess the potential for **consensus**
 - Solicit **new ideas** directly




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Lesson's Learned On Stakeholder Listening Sessions

- **Number and size varies greatly**
 - **Make it easy for people to participate**
 - **Enable people to be heard**
 - 7 sessions in CA
 - 6 sessions in PA, ID, GA, NY, CO and MA
 - 5 session in AR, SC, VT, HI
 - 3 sessions in CT, FL (600+ participants)
 - 2 sessions in NH, UT, KS, DC
 - 1 session in DE and USVI
- Process has been refreshing for state GIS programs
 - Stakeholder participation has generally exceeded expectations
 - Opportunity for state program to "connect" with stakeholders



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Lesson's Learned Visioning

- **Can be more challenging than it sounds**
 - Do you know what is wanted/needed?
 - Looking for stakeholder ratification
 - Do you need to do original discovery?
 - Quite specific vs. **very broad**
- **What is the "Vision thing"?**
 - Succinct statement (e.g. Mission Statement)?
 - Statement of values and principles
 - Addressing a specific problem

FLORIDA:
"To improve the *quality of life* in Florida by optimizing the use of geographic information through communication, coordination, and collaboration."

ARKANSAS:
"To provide recurring funding for continual investment in, and improvement of the Arkansas Spatial Data Infrastructure."

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Lesson's Learned Goals Development & Prioritization

- **How do programmatic goals flow from the Vision?**
 - Review the SWOT
 - **Leverage** strengths
 - **Address** weaknesses
 - **Seize** opportunities
 - **Avoid** threats
 - Think in terms of "projects"
 - **What projects do we need to complete in order to realize the Vision?**
- **How do we prioritize? How do we gain consensus?**
 - Listen carefully
 - Ask the stakeholders/committee for input
 - New York's committee completed a formal "prioritization voting" process

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Lesson's Learned Common Issues the state's face

- Many states have **internal coordination challenges**
 - Intra-governmental coordination between agencies can be a challenge
 - Huge amounts of state GIS happen at the Agency level: DOT, DNR, DEP, DPH
 - Many states still do **not have central GIS coordination offices**
 - Large states like CA and FL
 - Smaller states like DE, NH or WY
- States are a **microcosm of federal NSDI coordination**
 - Engaging local government partners for data sharing and cooperative funding
 - Internal agency coordination (e.g. US-DOT, DOI and DOD)

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Lesson's Learned How states are trying to making GIS relevant

- It's not about GIS *technology*, it's about what GIS does
 - Improving the "health and well being" of citizens
 - Common state issues and priorities:
 - **Economic development**
 - **Education**
 - **Public safety**
 - **Environment & alternative energy**
 - From Wisconsin's Executive Summary (emphasis added): **Emergency response. Wireless 911. Pandemic planning. Voter registration. Sex offender tracking.** Each of these presents serious challenges for our society, and the public expects and deserves these and numerous related issues to be addressed efficiently and effectively. The coordinated use of geographic information and technologies, including geographic information systems (GIS), is the most effective way to meet these challenges.

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Lessons Learned

Barriers to NSDI

- **GIS equity** issues at the state level
 - Several states describe a situation of GIS “haves” and “have nots” (AR, MA, KS, FL)
- Application of **Freedom of Information** laws for GIS data (UT, NH, NY, MA, KS)
 - If only we could all be like Arkansas...
 - OMB Circular A-130 Emphasizes Federal/NSDI policy: **“free flow of information between the government and the public is essential to a democratic society”**
 - How can we assemble statewide layers, much less nationwide layers when counties and local governments may not willingly share data?
 - Risk of alienating some stakeholders
 - Emerging case law is critical – and reiterates that **GIS data are public records**
 - CT Supreme Court decision against Greenwich
 - CA Court of Appeals decision against Santa Clara County

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Lesson's Learned

The Utility and Challenges of the Guidelines

- **Guidelines are an effective tool** and do not force one size to fit all
 - Extract the essence of sections
 - Tune to local conditions and priorities
 - Provides guidance on **form and organization, content will vary greatly**
 - Ability to adjust semantics
 - Sec. 3.1 “Who Are We” → “Who is the New York Geospatial Stakeholder Community”
- But, **too much variety** in plans from 2006-2008
 - Some used templates rigorously
 - Some loosely followed templates
 - Some ignored templates entirely
 - Led to guideline revisions in 2009 and “minimum required elements”
 - **Class of 2010 should use the guidelines**


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Lesson's Learned

Clarifying the Differences between Strategic & Business Plans

- **The one-two punch of strategic and business planning**
- **One** Strategic Plan, potentially **many** Business Plans
- **Strategic Plan**
 - **What and Why**
 - Vision & Goals
 - The “big picture” and overall context
- **Business Plan**
 - **How, When, and How Much**
 - Aimed at those that approve and fund
 - Details of implementation emerge
 - Presented as a business case
- Some states have attempted “Strategic Business Plans”
 - Must be handled with care

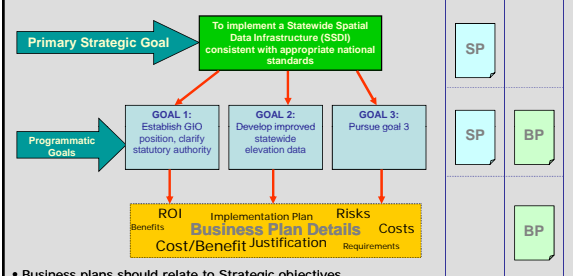


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Lesson's Learned

Clarifying the Differences between Strategic & Business Plans



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    graph TD
      PS[Primary Strategic Goal] --> SS[To implement a Statewide Spatial Data Infrastructure (SSDI) consistent with appropriate national standards]
      PG[Programmatic Goals] --> G1[GOAL 1: Establish GIO position, clarify statutory authority]
      PG --> G2[GOAL 2: Develop improved statewide elevation data]
      PG --> G3[GOAL 3: Pursue goal 3]
      SS --> G1
      SS --> G2
      SS --> G3
      G1 --> ROI[ROI Benefits]
      G1 --> IP[Implementation Plan]
      G1 --> R[Cost/Benefit Justification]
      G2 --> IP
      G2 --> R
      G3 --> IP
      G3 --> R
      R --> C[Costs Requirements]
      subgraph Grid
        SP1[SP]
        SP2[SP]
        BP1[BP]
        BP2[BP]
      end
  
```

- Business plans should relate to Strategic objectives
- Business Plans come from goals
- **You can have more than one Business Plan**

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Discussion & Questions

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Case Studies of Past Recipients

“Lightning Talks”

1. Arthur Buto, Hawaii
2. Aimee Dubois, Maine
3. David Arbeit, Minnesota
4. Dan Widner, Virginia

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Case Studies of Past Recipients: *State of Hawaii*

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State of Hawaii

Strategic and Business Plans of the Hawaii Geographic Information Coordinating Council (HIGICC)

Arthur Buto
President, HIGICC
Member, Steering Committee
March 2008 – August 2009

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State Facts

- Land Area: 6,423 sq. mi. [47]
- Population: 1.2 million [42]
- Capital: Honolulu
- GIS Council: HIGICC is a 501(c)(3) private nonprofit organization, with a volunteer Board comprising federal, state, county and private sector members
- State GIS Coordinator: Craig Tasaka, State Office of Planning
- Number of Counties: 4
- Mythbusters:
 - Barack Obama was born in Hawaii
 - Spam is not the state mammal
 - There is no little grass shack on Kealahou, Hawaii
- Fun Facts:
 - Only state to grow coffee and chocolate
 - Once an independent sovereign nation ruled by a monarchy
 - We have our own time zone

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Project Facts

- Briefly Characterize Stakeholder Participation
 - Good level of participation and honest input and feedback
- Planning methods (Steering Committee and Consultant):
 - Conducted information gathering sessions in each of the four counties
 - Posted an online survey
 - Conducted individual interviews with key stakeholders
 - Posted draft plans on wiki site
- Project Vision and/or Mission Statement:
 - Assess HIGICC's mission and performance over the last ten years
- Key Goals and/or Desired Outcomes:
 - Develop actionable and achievable plans that could focus the energies of our stakeholders and members; get a buy-in from stakeholders
 - Raise awareness of the organization; reach additional sectors of the geospatial community throughout the state

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What We Did Right

- We got great stakeholder participation
 - Information gathering sessions were held in each county
 - Posted an online survey
 - Conducted individual interviews
 - Posted drafts of plans on wiki site
 - Good cross-section of the geospatial community
- We listened well
- We acted on the plans almost immediately

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Problems We Had

- Keeping momentum going after the information gathering phase
- Difficult keeping to writing schedule because of the volunteer nature of council
- Some difficulty prioritizing business plan development (which direction)

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What I Wish We Had Done

- Made a more concerted effort to engage the State CIO in the development of the plans
- Conducted additional information gathering sessions on the neighbor islands

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Summary

- Favorite Discovery and/or Biggest Surprise!
- Key Results:
 - Reaffirmed the mission and relevance of the Council
 - Refocused the energies of the Board and membership
 - Put us in a good position to pursue Category 4 CAP
- Next Steps Going Forward:
 - Continuing to empower our standing committees (Board involvement, but driven more by members) – Education, Outreach, Membership, Data, etc.
 - Pursuing funding opportunities; direct state funding unlikely in the near future
 - Establish better working relationship with State CIO

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Mahalo !



Arthur Buto
president@higicc.org

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Case Studies of Past Recipients:

State of Maine

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1. Who are we?

- Name of State - Maine
- Speaker's Name – Aimee Dubois
- Name of Project – Category 3: Strategic Planning, Business Plan Development
- Speaker's Role in Project – Advisor/Participant
- State Sponsoring Agency – Maine GeoLibrary, Maine Office of GIS
- Project Timeframe – January 1, 2008 to May 1, 2009

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2. State Facts

- Land Area - 35,400 square miles
- Population – 1.3 million
- Capital City - Augusta
- Type of GIS Council – Legislated council “GeoLibrary”
- State GIS Coordinator (or GIO) and Department Affiliation – Michael Smith, Maine Office of GIS
- Number of Counties - 16
- Something you should know about my state that you might not know – Number of lobsters caught each year is about 30x the number of people living in the state.

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3. Project Facts

- Briefly Characterize Stakeholder Participation – Participation in the original strategic plan and business plan development was statewide using forums, surveys, and other communications methods. Participation in this project covers local, county, and state governments, private sector, private citizens, and universities in the project area.
- Planning Methods (e.g. workshops, survey, consultant or internal). We hired a contractor to organize forums and surveys, to collect responses, and to draft the plans.
- Scope (e.g. Strategic Plan, Business Plan, or both?). Both – strategic plan for all geospatial needs and biz plan for cadastral data.
- Project Vision and/or Mission Statement – outcome is to have an updated strategic plan aligned with 50-States.
- Key Goals and/or Desired Outcomes – plan for going forward with geospatial advances.

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4. What We Did Right

For example:

- We held wide-ranging public forums throughout the state, and some targeted forums just to certain business sectors.
- We provided public feedback periods by posting draft plans on the web and allowing public review.
- We hired a contractor to help with the process.
- Contractor was guided by an active representative stakeholder group
- Most importantly - we are following through on implementation – it will not just be a report filed on a shelf.

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5. Problems We Had

For example:

- Change of state GIS coordinator right at the beginning – new one not entirely up to speed on the project.
- Difficulty maintaining focus over long periods of time with volunteer steering group.

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6. What I Wish We Had Done

Wish we were able to focus and move quickly to produce the plans. Each time there is a long period between drafts to review you almost have to start over.

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7. Summary

- Updated strategic plan for Maine, aligned with 50-States, finished May 2009 and available at www.maine.gov/geolib.
- Business plan for integrated land records completed in same time frame.
- Follow-up with workgroups and coordination to meet strategic plan needs.
- Follow-up with successful 2010 CAP Category 4 grant to implement land records plan with a prototype integration model.

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Case Studies of Past Recipients:

State of Minnesota

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1. Who are we?

- Name of State
Minnesota
- Speaker's Name
David Arbeit
- Name of Project:
Implementing an Enterprise Strategy for Minnesota's SDI
- Speaker's Role in Project
Project Leader
- State Sponsoring Agency
Administration
- Project Timeframe
Summer 2006 through November 2007




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2. State Facts

- Land Area
83,574 square miles plus 7,326 square miles of water
- Population
5.3 million
- Capital City
Saint Paul
- Type of GIS Council
Two advisory councils established in legislation
- State GIS Coordinator (or GIO) and Department Affiliation
David Arbeit (GIO)/Department of Administration
- Number of Counties
87
- Something you should know about my state that you might not know
Source of the Mississippi River




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3. Project Facts

- Stakeholder Participation
Extremely active throughout the process. Emphasized "policy actors" and "business managers" in addition to technical stakeholders.
- Planning Methods
Extensive use of workshops, facilitated by consultants (both internal and external) and supplemented by group meetings and surveys
- Scope
Strategic plan, focusing on stakeholder engagement
- Project Vision and/or Mission Statement
Improve services statewide through the Coordinated, Affordable, Reliable and Effective use of GIS
- Key Goals and/or Desired Outcomes
Establishment of a state coordinating entity with a clear legislative mandate, strong stakeholder commitment, and sustainable funding.

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4. What We Did Right

- Actively engaged stakeholders
 - More than 200 participants in project workshops, meetings, surveys*
 - Went out of our way to engage agencies at management level – through CIOs and program managers.*
 - Continually reported back to stakeholders about progress*
- Turned adversity to an opportunity!
 - When the Governor proposed a dramatic funding reduction, stakeholders responded. Provided opportunity to educate legislative leaders and get Commissioner on board.*
- Adjusted to take advantage of strategic coordination opportunities
 - Sponsored and/or supported collaborations such as MetroGIS, NAIP participation, and enterprise licensing initiatives.*

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5. Problems We Had

- False start with initial strategic planning consultant.
CAP funds were initially used to hire PT staff and hire a strategic planning consultant, who did not work out.
- Insufficient grant funding to carry the process to conclusion
The CAP grant got us off the "launch pad" but the process required a sustained effort beyond the grant period.
- Dramatic proposed budget reductions during project follow-up
The Governor proposed a 75% reduction in funding for MN's "de facto" GIS coordinator, as the project was getting under way. The legislature restored funding, but funding was reduced again during the project.

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6. What I Wish We Had Done

- Start the process earlier through active stakeholder engagement!



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7. Summary

- Favorite Discovery and/or Biggest Surprise!
 - Stakeholders responded to respectful and confident leadership
 - Exceptional support from executive branch and legislative leaders
- Key Results and/or Successful Outcomes
 - Legislation creating the MN Geospatial Information Office!
 - "Go To" status during current legislative session
 - Continued stakeholder engagement
- Next Steps Going Forward
 - Sustain stakeholder commitment and confidence
 - Deliver tangible results!
 - Secure supplemental funding

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Case Studies of Past Recipients: Commonwealth of Virginia

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1. Who are we?

- Name of State: Virginia
- Speaker's Name: Dan Widner
- Name of Project: GIS Strategic Plan: 2010-2015
- Speaker's Role in Project: Project Sponsor
- State Sponsoring Agency: Virginia Information Technologies Agency –
- Project Timeframe: March 2009 – February 2010

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2. State Facts

- Land Area: 39,594 square miles
- Population: 7,769,089 (2008 Census estimate)
- Capital City: Richmond
- Type of GIS Council: Mandated through legislation
- State GIS Coordinator (or GIO) and Department Affiliation: Dan Widner, Virginia Geographic Information Network
- Number of Counties: 95
- Something you should know about my state that you might not know
 - One-fourth of the Appalachian Trail is in Virginia (550 of 2,178 miles)
 - Virginia is one of four states that are a "Commonwealth"

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3. Project Facts

- Stakeholder Participation:

GIS stakeholders include the VGIN Advisory Board, VGIN staff, local government, state government, federal government, planning district commissions (PDCs), non-governmental organizations (NGOs), public safety, academia, the private sector, and the general public
- Planning Methods:
 - Meetings with VGIN staff
 - One-on-one stakeholder interviews
 - Online stakeholder surveys
 - Regional town hall meetings and webinars around the Commonwealth
 - Online prioritization homework for town hall meeting participants
 - Meetings with the VGIN Advisory Board
 - Two-week public comment period on the draft Strategic Plan.
- Scope: Strategic Plan (Available [Online](#))

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3. Project Facts Continued

- Project Vision and/or Mission Statement:

Using Geographic Knowledge to Create a Better Virginia
- Key Goals and/or Desired Outcomes

GOAL 1: Coordination and Collaboration - Provide greater coordination and facilitate collaboration within the geospatial community

 - Initiative 1: Develop and maintain geospatial standards
 - Initiative 2: Oversee the development of a Commonwealth-wide geospatial clearinghouse that connects all levels of government and other VGIN stakeholders

GOAL 2: Communication - Increase communication and outreach to the general public, decision makers, and the geospatial community

 - Initiative 3: Facilitate geospatial educational opportunities
 - Initiative 4: Provide marketing advocacy and outreach by acting as the primary champion of GIS in Virginia

GOAL 3: Creative Services - Continue to create a platform for spatial solutions in the Commonwealth

 - Initiative 5: Provide framework basemap data layers to augment the current orthophotography and road centerline data layers
 - Initiative 6: Identify and develop innovative technical solutions

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4. What We Did Right

What are the top three (3) things you did right?

1. *We learned from previous 50 States Initiative efforts*
2. *Made our effort a stakeholder driven plan*
3. *Talked up the strategic planning effort long before initiation*

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5. Problems We Had

What were three (3) problems you encountered?

1. *Two champions, the CIO and Secretary of Technology, left right before we got started*
2. *Getting the contract approved took longer than anticipated*
3. *General public participation was almost nil*

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6. What I Wish We Had Done

What are three (3) things that you wish you did during the planning process?

1. *Better minimized the "hurry up and wait" approach to project initiation*
2. *Had more transparency in the Stakeholder Interview selection process*
3. *Remembered what the third item was*

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7. Summary

- Favorite Discovery and/or Biggest Surprise!
 - Town Hall Meetings where free and open feedback/discussion occurred were the most valued component
- Key Results and/or Successful Outcomes: Did This Process Make a Difference, and How?
 - Definitely yes! For Virginia, this improves our formalization efforts, provides inputs to our business plan update, and helps us with milestones and associated metrics
- Next Steps Going Forward: What Do You Need to Do to Move Toward Full Implementation?
 - Prioritization
 - Develop Milestones and Metrics
 - Develop implementation strategies and "test drive"

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2010 NSGIC Mid-Year Conference

Strategic Planning Break-Out Session


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The Guidelines for Fifty States Plans

The one-two punch of Strategic & Business Plans

- **One** Strategic Plan, potentially **many** Business Plans
- **Strategic Plan**
 - What and Why
 - Vision & Goals
 - The "big picture" and overall context
- **Business Plan**
 - How, When, and How Much
 - Aimed at those that approve and fund
 - Details of implementation emerge
 - Presented as a business case



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Strategic Plan vs. Business Plan

Primary Strategic Goal → To implement a Statewide Spatial Data Infrastructure (SSDI) consistent with appropriate national standards

Programmatic Goals → GOAL 1: Establish GEO position, clarify statutory authority; GOAL 2: Develop improved statewide elevation data; GOAL 3: Pursue goal 3

Business Plan Details → ROI Benefits, Implementation Plan, Risks, Costs, Cost/Benefit Justification, Requirements

SP	
SP	BP
	BP

- Business plans should relate to Strategic objectives
- Business Plans come from goals
- You can have more than one Business Plan

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Common Patterns in Statewide GIS Strategic Plans

- 53 CAP grants awarded since 2006 (this includes 10 for 2010)
 - 23 completed **Strategic Plans** posted
 - 17 completed **Business Plans** posted
 - All plans posted at: <http://www.fgdc.gov/policyandplanning/50states/tableofplans>
- Tremendous variety among plans
 - In-house production vs. consultant
 - Degree of use of FGDC/NSGIC guidelines
 - Depth and breadth (e.g. 12 – 75 pages)
 - Planning context
 - Looking "outside the box"
 - Governance and organizational issues
 - Generally improving coordination
 - Broad perspective vs. single issue focus
 - SD's plan is just about cadastral data

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Addressing Strategic Plan Variety

Minimum Required Elements

- Key perspective gained preparing for 2009 Federal Stakeholder's Workshop when we reviewed the 20+ completed plans
- Some level of **commonality** required so that:
 - Plans can be better compared and contrasted
 - Summary info can be assembled
 - This is of key value to **Federal stakeholders**
 - 50 States Initiative is designed to help them
 - A resource where people can gain a quick thumbnail of a state's GIS effort and priorities
 - Such a resource should be valuable to states too (e.g. to learn from/about your peers and neighbors)

State	Strategic Plan	Business Plan	Executive Summary	Stakeholder Table	Framework Layers	NSGIC 9-Criteria	Clearinghouse	SWOT
AK	X	X	X	X	X	X	X	X
AL	X	X	X	X	X	X	X	X
AR	X	X	X	X	X	X	X	X
CA	X	X	X	X	X	X	X	X
CO	X	X	X	X	X	X	X	X
CT	X	X	X	X	X	X	X	X
DC	X	X	X	X	X	X	X	X
DE	X	X	X	X	X	X	X	X
FL	X	X	X	X	X	X	X	X
GA	X	X	X	X	X	X	X	X
HI	X	X	X	X	X	X	X	X
IA	X	X	X	X	X	X	X	X
ID	X	X	X	X	X	X	X	X
IL	X	X	X	X	X	X	X	X
IN	X	X	X	X	X	X	X	X
KS	X	X	X	X	X	X	X	X
KY	X	X	X	X	X	X	X	X
LA	X	X	X	X	X	X	X	X
MA	X	X	X	X	X	X	X	X
MD	X	X	X	X	X	X	X	X
ME	X	X	X	X	X	X	X	X
MI	X	X	X	X	X	X	X	X
MN	X	X	X	X	X	X	X	X
MO	X	X	X	X	X	X	X	X
MS	X	X	X	X	X	X	X	X
MT	X	X	X	X	X	X	X	X
NC	X	X	X	X	X	X	X	X
ND	X	X	X	X	X	X	X	X
NH	X	X	X	X	X	X	X	X
NJ	X	X	X	X	X	X	X	X
NM	X	X	X	X	X	X	X	X
NV	X	X	X	X	X	X	X	X
NY	X	X	X	X	X	X	X	X
OH	X	X	X	X	X	X	X	X
OK	X	X	X	X	X	X	X	X
OR	X	X	X	X	X	X	X	X
PA	X	X	X	X	X	X	X	X
RI	X	X	X	X	X	X	X	X
SC	X	X	X	X	X	X	X	X
SD	X	X	X	X	X	X	X	X
TN	X	X	X	X	X	X	X	X
TX	X	X	X	X	X	X	X	X
UT	X	X	X	X	X	X	X	X
VA	X	X	X	X	X	X	X	X
VT	X	X	X	X	X	X	X	X
WA	X	X	X	X	X	X	X	X
WI	X	X	X	X	X	X	X	X
WV	X	X	X	X	X	X	X	X
WY	X	X	X	X	X	X	X	X

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New Minimum Required Elements

- Section 1: Executive Summary** must include:
 - What do you want do?
 - What stakeholders were engaged in planning process?
- Section 2: Current Situation** must include:
 - Who is coordinating the planning process?
 - Table of Stakeholder Participants
 - Status table on Framework Layers
 - Status table on NSGIC 9-criteria
 - Clearinghouse status
 - Basic SWOT
 - Top 3 strengths
 - Top 3 weaknesses
 - Top opportunity
 - Top threat

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Strategic Planning: New Minimum Required Elements

- Section 3: Vision & Goals** must include:
 - Vision or mission statement
 - Top 3 goals/recommendations
 - Programmatic goals for highest priority strategic goal
- Section 4: Requirements** must include:
 - Overall estimate of costs
- Section 5: Implementation Program** must include:
 - Proposed phasing and timeline
 - Alignment of cost sharing opportunities (if applicable)
- Section 6: Appendix – Strategic Planning Methodology** must include:
 - How was planning process organized and conducted

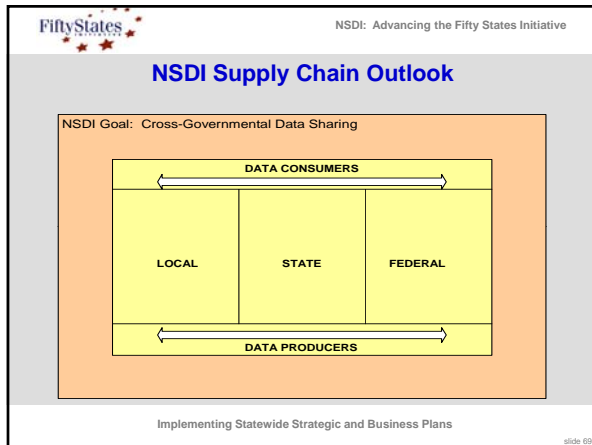
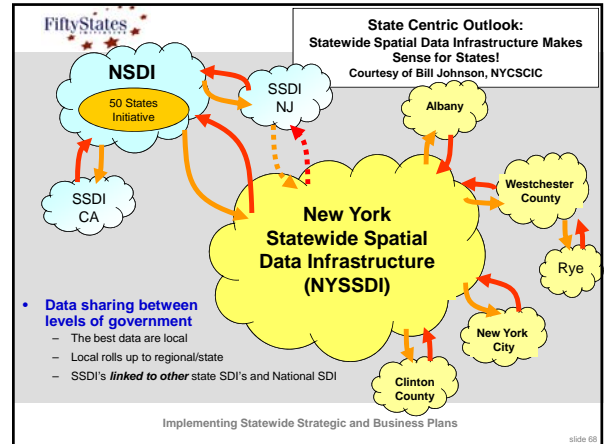
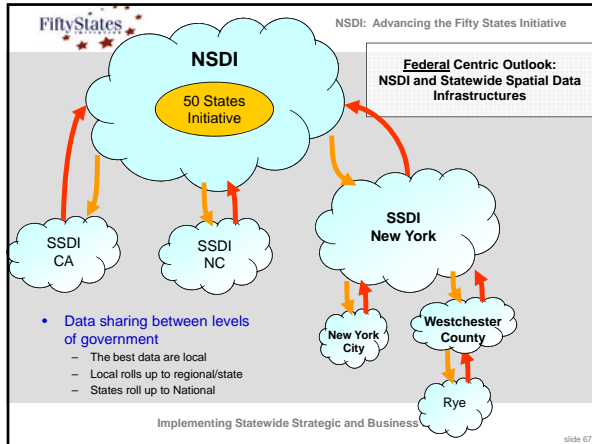
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Strategic Planning Context

- Take an overall look at GIS in *My State*
 - GIS **success stories** at all levels of government
 - What are the ingredients for success?
 - Identify **challenges and gaps**
 - What are these and how do we overcome them?
 - Take a look "outside the box"
- How does *My State* fit into the larger national picture and relevant Federal initiatives
 - National Spatial Data Infrastructure (NSDI)
- Strategic Planning Process must be "**locally relevant**"
 - It can't be just about NSDI

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What is the Purpose of a Strategic Plan?

- Identify and articulate a **Vision**
- Identify and articulate **Long Term Goals**
 - What needs to happen to achieve the long-term Vision?
- Determine Programmatic Goals
- Identify **Risks**
 - Develop strategies for overcoming risks
- Engage stakeholder community

"Plans are nothing; planning is everything"

<http://www.whitehouse.gov/history/presidents/de34.html>

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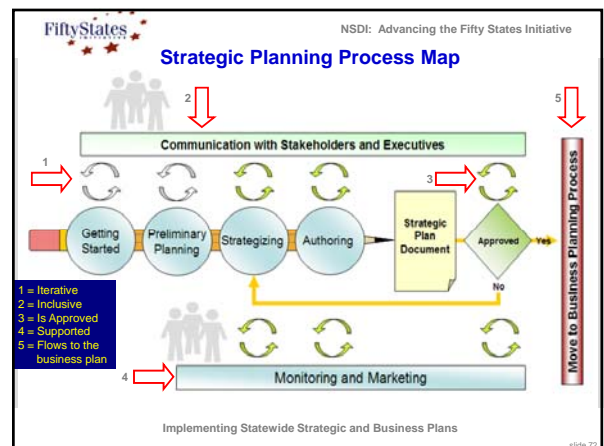
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Who is our Target Audience?

- What does FGDC expect and what does the Federal government need to understand about our state?
- Who owns the plan?
 - State government?
 - Geospatial stakeholders at large?
 - The "coordination council"?
- Who is the plan aimed at? Who do you need to convince?
 - Decision makers?
 - Stakeholders?
 - What would make them support this initiative?
- Are there any political barriers?
 - Election Year/Transition Year
 - Party in control
 - Timing can be everything

There is no single "right answer" – it will vary from state to state


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What do the Strategic Plan Guidelines achieve?

- Provides a **Consistent Framework** for Articulating:
 - Purpose and drivers
 - Roles of participants
 - Strengths & Weaknesses
 - Objectives and long-term Vision
 - Values (e.g. "free flow of data")
- Provides FGDC a means of more easily "comparing and contrasting" plans




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Let's take a look inside the Strategic Plan Guidelines

Straightforward high-level outline of 6 sections

- Executive Summary
- Current Situation
- Vision and Goals
- Requirements
- Implementation Program
- Appendix: Strategic Planning Methodology

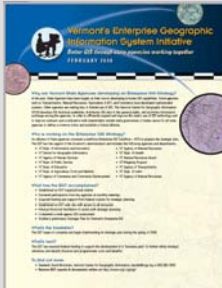


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1. Executive Summary

- Executive Level Presentation
 - 2 – 10 pages
 - Or, two documents: short, very-short
 - MA: 75 page document, 5 page Executive Summary
 - Plus 10 page "standalone" extended summary
 - VT: "standalone" 2 page brochure
- Strategic objectives of plan
- Key findings that support objectives
- Benefits to be realized
- Resource and budget requirements
- Simplified timeline




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2. Current Situation

- Assessment of the status quo
 - Who are we?
 - Stakeholder community characterization
 - Where are we now?
 - GIS and governance history/legislation
 - Relative to NSGIC/FGDC 9-criteria
 - Framework data set status
 - Identify relevant issues where GIS matters
 - What's on the governor's agenda?
 - How do we interact with the Federal government?
- SWOT
 - Strengths and Weaknesses
 - Opportunities and Threats
 - Generally, one of the meatier sections of the plan
 - What's going well?
 - Where are the gaps/problems?



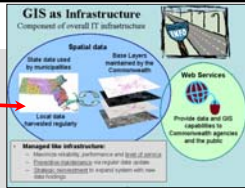
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4. Vision and Goals

- Is the overarching goal is SSDI?
- Vision Statement/Definition
 - Statement of values
- Strategic Goals
 - High level
- Articulating programmatic goals
 - What is needed to achieve the vision?
 - Series of projects and initiatives
- Monitoring and Measuring Success
 - Key success factors?
 - Performance metrics?
- Realistic short and long-term horizons

The goals are your recommendations



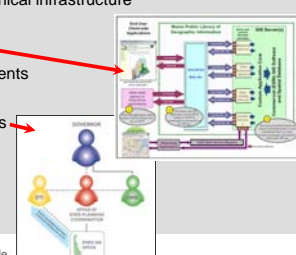
The Kansas Geographic Information System Partnership initiative will be a collaborative effort among the statewide geospatial community that delivers robust, map-based, geospatial information and services to support policy and decision making at all levels of government, to provide access to public information and to enhance the safety, economy, environment and quality of life in Kansas.

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5. Requirements

- Once there's consensus on *what to do*, this is a simple enumeration of new requirements to make progress
- Assessment of *existing resources* already available to support
 - Assessment of existing technical infrastructure
 - Data Requirements
 - Technology Requirements
 - Human Resource Requirements
 - Standards
 - Organizational Requirements
 - Executive support
 - Coordination
 - Policy
 - Staffing
 - Budget
 - Risk assessment



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Business Plan Purpose

- To support the **successful implementation** of the programs identified in your organization's **Strategic Plan**.
- Provides the **details** of the steps required to achieve the goals identified.
- Lays out a **schedule** for the order and timing of the steps.
- Makes a sound **business case** to one or more of the decision makers to approve and provide the resources needed to achieve your goals (funding, staffing, time, etc)

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What should be in a Business Plan?

- Describes **who** you are
- Describes **what** you want to achieve
- Describes the **benefits** to be realized
- Quantifies **cost**
- Details potential return on investment, cost benefit (or not?)
- Outlines an **implementation plan**
- Provides evidence of **due diligence**

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FiftyStates NSDI: Advancing the Fifty States Initiative

Business Planning: New Minimum Required Elements

- Section 1: Executive Summary** must include:
 - What outcome(s) are you proposing to accomplish?
 - What do you need to do it?
- Section 2: Program Goals** must include:
 - What are the specific programmatic goals for this BP and which Strategic Goals do they relate to?
 - What are the success factors for each programmatic goal?
- Section 3: Benefits and Justification** must include:
 - Why do you want to do this?
- Section 4: Requirements and Costs** must include:
 - What is your organizational approach?
 - Estimated total costs?
 - Required standards?
- Section 5: Implementation Program** must include:
 - Proposed phasing and milestones
 - Budget
- Section 6: Measuring Success and Feedback for Recalibration** must include:
 - Criteria for performance measurement

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Strategic Plan vs. Business Plan

Business plans should relate to Strategic objectives
 Business Plans come from goals
 You can have more than one Business Plan

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FiftyStates NSDI: Advancing the Fifty States Initiative

Strategic Plan vs. Business Plan in Kansas

The Kansas Geographic Information System Partnership initiative will be a collaborative effort among the statewide geospatial community that delivers robust, map-based, geospatial information and services to support policy and decision making at all levels of government, to provide access to public information and to enhance the safety, economy, environment and quality of life in Kansas.

Primary Strategic Goal

Programmatic Goals

- GOAL 1: Improved Statewide Elevation Data
- GOAL 2: Sustainable funding
- GOAL 3: Outreach to local Government
- GOAL 4: Statewide Parcel Data
- GOAL 5: Fund improvements to additional data layers
- GOAL 6: High-res orthoimagery
- GOAL 7: Statewide Critical Infrastructure data
- GOAL 8: Electronic distribution of PLS data to public

Strategic Plan identified **eight programmatic goals** in support of the overarching Primary Strategic Goal
 The first **programmatic goal** was the focus of the Business Plan

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Strategic Plan vs. Business Plan in Connecticut

Primary Strategic Goal: Improve coordination of Geospatial activities at all government levels in the State of Connecticut in support of their SSDI

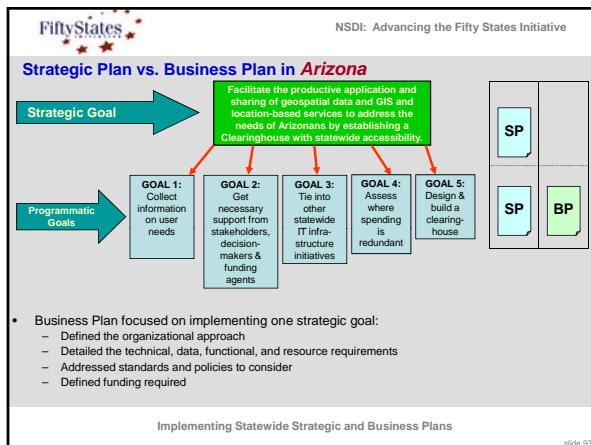
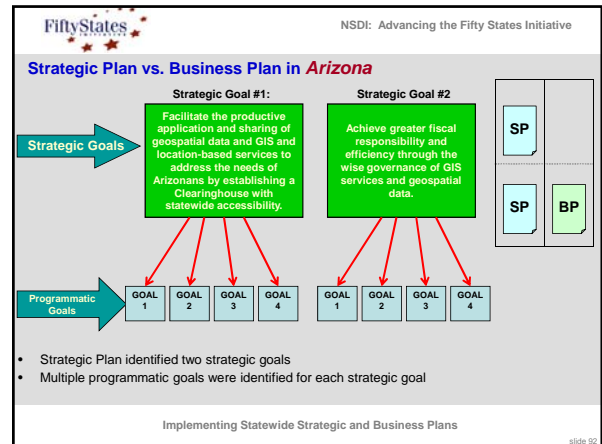
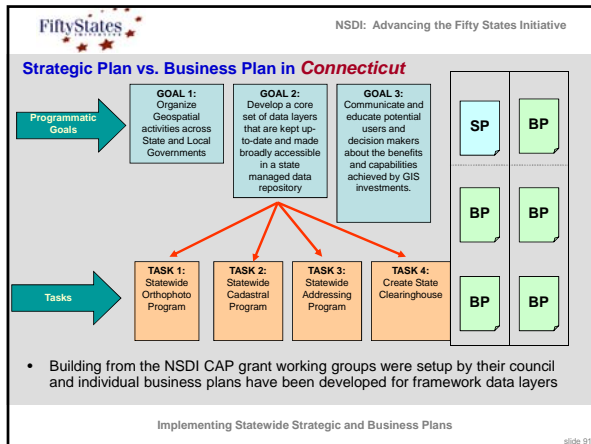
Programmatic Goals

- GOAL 1: Organize Geospatial activities across State and Local Governments
- GOAL 2: Develop a core set of data layers that are kept up-to-date and made broadly accessible in a state managed data repository
- GOAL 3: Communicate and educate potential users and decision makers about the benefits and capabilities achieved by GIS investments.

Strategic Plan identified **three goals** that needed to be met to achieve the primary strategic goal
 An overall Business Plan that:

- Detailed the status of each of the programs
- Addressed phasing of strategic goals
- Laid out important state initiatives to tie to
- Defined funding required

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- FiftyStates NSDI: Advancing the Fifty States Initiative
- ### When writing a Business Plan think of these things:
- **Relevant** to the decision makers
 - **Short, clear and concise**
 - Easy to read and approve (minimize GIS lingo)
 - **Compelling**
 - **Credible** and factually correct
 - **Action oriented**
- Content is aimed at a very specific readership*
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Strategic Plan vs. Business Plan, structural differences and similarities...

Strategic Plan	Business Plan
• Executive Summary	• Executive Summary
• Current Situation	• Program Goals
• Vision and Goals	• Program Benefits and Justification
• Requirements	• Program Requirements and Costs
• Implementation Program	• Organizational Approach
• Appendix (Strategic Planning Methodology)	• Implementation Plan

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Strategic Plan vs. Business Plan, content differences and similarities...

Strategic Plan	Business Plan
• Executive level presentation	• Detailed presentation
• Can have supporting or reference docs	• Should stand alone
• Defines strategic objectives of plan	• Details objectives into actionable items
• Outlines benefits to be realized	• Makes business case
• Outlines resources needed	• Details resources needs
• Simplified timeline	• Detailed implementation plan
• High-level budget estimates	• Detailed budget
• Identifies target audience	• Aimed at getting approval and funding
• Includes communication strategy	• Includes marketing or branding

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Business Plan: Program Benefits and Justification

Quantitative

Measuring the value of your proposal enhances credibility

- ROI assessment
- Cost Savings
- Time saving
- Cost avoidance
- Cost of doing nothing
- Revenue Generation

ROI = (benefit-cost)/cost

Measurement Metrics:

- Time
- CB Ratio
- Dollars
- % Increase
- Annualized Staff Reduction

•GIT Business Case Development and ROI Literature Review
 •GITA Research Division
 •The Business Benefits of GIS: An ROI Approach (PA Consulting Group, ESRI Press)

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Business Plan: Program Benefits and Justification

Qualitative

Non-Financial/Hard to quantify/Collateral Benefits

- Meeting a mandated requirement
- Societal/community benefit
 - Better or more available data
 - More efficient data exchange
 - Improved customer service
 - Improved quality of life
 - Better management of environment
 - Saving life's
 - Improved Decision Making
 - Increase in responsiveness
- Spin-off benefits
 - Improved mapping
 - Response to the unexpected
 - Enhanced revenue
 - Improved efficiency
- Benefit accrual

Georgia, Case for a GIO

In the event of an emergency or to fulfill national and state legal requirements, the Georgia GIS Clearinghouse is not currently enabled to provide a complete list of assets when queried.

Oregon GIS Utility Initiative

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Business Plan: Program Requirements and Costs

Budget Requirements

- Short-term, long-term projected costs broken down as appropriate:
 - Planning, acquisition, implementation, operations, maintenance, consultant, other
- Cost of the Status Quo
- Sources of funding:
 - General funds, mission specific, service fees, permits/licenses, grants, cost recovery
 - What is the source of funding over the long-term?
- Remaining insulated from being cut

Phase I costs estimates:
 Low estimate: \$815,000
 High estimate: \$1,477,000
 Phase II cost estimates:
 Low estimate: \$1,016,000
 High estimate: \$2,032,000
 Total Cost: \$1,831,000 - \$3,509,000
 Average: \$2,670,000

Breakdown by activity (calculated from the average of low/high bracket):
 Hardware & Software: 17.4%
 Professional Services: 25.0%
 Application Development: 57.6%

Commonwealth of Massachusetts Investment Brief for parcels data development

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Risk Assessment

- What is Risk?
 - Uncertainty about a situation
 - Program not successful
 - Loss of key people
 - Conflicts with mandates
- Part of planning
- What is the likelihood and potential impact
- How to mitigate

Identify
 Quantify
 Plan Response
 Monitor

Probability	4	Medium	Critical
	3		
	2	Low	High
	1		
			Impact
			1 2 3 4

Oregon GIS Utility Initiative

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Marketing Plan

- Develop a message
 - What is the objective?
 - What is the value proposition?
 - How does this initiative directly support other 'high visibility' initiatives?
 - How does your message support your stakeholder community?
- Develop collaterals
- Deliver the message
 - To:
 - Senior level decision makers
 - Other 'change' agents
 - Stakeholders
 - By:
 - Website
 - Special events
 - Presentations at workshops, conferences, other
 - Site visits
 - Press releases

Are you ready with the 2 minute synopsis (ready with sales pitch)?

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Summary...The Business Plan

- Business Plan is designed to **detail steps** to follow to **achieve one or more goals**
- Makes a compelling **business case** for:
 - what you want to achieve
 - what **benefits** to be realized
 - **Relevancy** to the organization
- **Targeted** document aimed at the decision makers
- Plan is "fresh" for a short period so "act"
- Leverage the geo-community and other resources
 - NSGI website – Hot Topics / 50 State Initiative
 - Other State activities and plans
 - Take credit for your successes

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Examples of Business Plans that have been completed or are under development through the CAP program

<p>Data Centric</p> <p>Administrative Boundaries: IA, AR, DC Cadastral: CT, SD, MO, IA, MI, AR, DC Elevation: KS, IA, MI, DC Geodetic Control: IA, DC Hydrography: IA, MI, DC Imagery: CA, CT, IA, MI, AR, DC Transportation: IA, CT, MI, DC Addressing: CT, IA, DC Centerlines: CT, AR, DC</p>	<p>Coordination & Governance</p> <p>Coordinating Body: FL, IN, WV, CT, UT, IA, HI GIO: WY, NH, MD, AZ State Office: MD, CT, WY, OK Council Structure: MD Communication/Marketing: CT, MD, OK, HI</p>
<p>Infrastructure</p> <p>Clearinghouse: UT, CT, AZ Technical Environment: OK, RI, ID Land Records: ME Applications & Services: DC</p>	<p>Funding</p> <p>Sustainable Funding: NC, CT, MD, AR ROI: IA, IN, WY</p>

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Business Planning Lesson's Learned

- Show **knowledge** and **awareness** of your state's budget climate and cycle (FY)
- Ask other states for **case studies**
- Answer the question, "**Who cares?**"
- **Who** you are trying to **convince** that your program initiative is worthy of their support (and ultimately, funding)
- Make it clear whom the **participants** are in your program initiative (i.e., if approved, who gets the work done, and how are they held accountable?)
- Develop a **clear plan of action** and milestones, with phases if appropriate – phasing can make the program initiative more palatable (and more realistic)
- Plan to show success along the way

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How do you improve your chances of success?

- Don'ts...
 - Write **complex** or **confusing** plans
 - **Assume** people know what you are talking about
 - Skip number crunching
 - **Inflate** the numbers
- Do's...
 - **Independent evaluation** of reasonableness
 - **Articulate** the compelling **reasons** for funding your project
 - Provide a **consistent message** about solving problems
 - Be **confident** and always prepared to make your case
 - Be **reasonable** and always ready with intelligent compromises

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Business Planning Questions and Answers



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2010 NSGIC Mid-Year Conference

Fifty States "Next Steps" and Wrap Up

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Making Progress



- **Strategic and Business Plans have been completed (or are underway) for 43 states & territories**
- Recognized progress has been made (and documented) toward SSDI and NSDI at individual state level
 - Organizational Change and Alignment – GIOs, GIS/IT alignment
 - Investments in statewide framework data layers
 - Stakeholder coordination – new or reinvigorated coordination entities and participation
 - Clearinghouse enhancements and upgrades

Your hard work is producing results.

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FiftyStates NSDI: Advancing the Fifty States Initiative

Challenges and Opportunities

18,000+ municipalities
 3,141 counties
 700+ regional & tribal org.
 50 states plus territories
 Federal Agencies
 Private Sector

X

Multiple framework
 data themes plus
 attributes

+

Funding
 Policy
 Standards
 Technology
 QA/QC
 Maintenance

- Vision for NSDI – “common objectives and products”
- Data Discovery and Delivery
- Progress Measurement
- Best Practices, Lessons Learned, Guidelines
- Sustainable Funding
- Shifting from Planning to Implementation

Advancing NSDI - It's still a big challenge!

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Recommendations – *Catalog Success*

1. Create Measurements of Success for NSDI
 - Data and non-data related metrics
 - Standardized measures of critical components, e.g., Maturity Assessment Model
 - Additional individual but comparable metrics to be identified during development of SP and BP
 - Self- assessment + Concurrence statements
 - Streamlined reporting system(s)
2. FGDC Should Create a Best Practices Library of Federal Agency and Statewide Case Studies for Common Issues and Opportunities
 - Document quantitative and qualitative successes, resources, strategies, methods

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FiftyStates NSDI: Advancing the Fifty States Initiative

Recommendations – *Shift Emphasis*

3. Fifty States Initiative CAP Grant Emphasis Should Shift from Strategic Planning to Business Planning
 - State strategic plans have identified numerous programmatic goals and worthwhile initiatives
 - Detailed business planning leads to funding and implementation
 - FGDC/NSGIC Business Planning Guidelines help states to make the business case
4. States Should Be Able to Use Fifty States Initiative CAP Grants to Catalyze Implementation Action on Their Strategic and Business Plans
 - CAP Grant seed funding for implementation projects can catalyze action and leverage other funding resources
 - Tied to SP and BP development, matching funds, benefits NSDI, progress reporting

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FiftyStates NSDI: Advancing the Fifty States Initiative

Recommendations – *Extend & Align*

5. FGDC Should Consider CAP Strategic and Business Planning Awards to Regional, County, and Local Governments
 - Regional entities play important role in aggregating and stewarding data
 - Linked to CAP Grant SP and BP at state level
 - Fosters inter-governmental coordination and cooperation
6. The CAP Grant Fifty States Initiative Grant Process Should be Aligned with Other Federal Grant and Funding Programs Targeted to States
 - E.g., ARRA funded Broadband Mapping, Transportation, ...
7. Continue and Strengthen Fifty States Initiative Communications and Marketing Activities

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FiftyStates NSDI: Advancing the Fifty States Initiative

Recommendations in Summary

1. Create Measurements of Success for NSDI
2. FGDC Should Create a Best Practices Library of Federal Agency and Statewide Case Studies for Common Issues and Opportunities
3. Fifty States Initiative CAP Grant Emphasis Should Shift from Strategic Planning to Business Planning
4. States Should Be Able to Use Fifty States Initiative CAP Grants to Catalyze Implementation Action on Their Strategic and Business Plans
5. FGDC Should Consider CAP Strategic and Business Planning Awards to Regional, County, and Local Governments
6. The CAP Grant Fifty States Initiative Grant Process Should be Aligned with Other Federal Grant and Funding Programs Targeted to States
7. Continue and Strengthen Fifty States Initiative Communications and Marketing Activities

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FiftyStates NSDI: Advancing the Fifty States Initiative



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