



Western Strategies Center Strategic Vision

Colorado Springs, El Paso County, and the Rocky Mountain Region have many challenges for the elected leadership of the various communities. While the elected bodies are usually engaged in response to short term problems due to their immediacy, there is a substantial need for dispassionate analyses of the longer range issues and the associated strategic planning they require. Western Strategies Center will provide the needed analysis.

Western Strategies Center (WSC) is a nonprofit category 501(c)3 policy center dedicated to identifying implementable solutions to problems affecting Colorado Springs, El Paso County and the Rocky Mountain Region. WSC's initial focus is El Paso County. As the Center grows, that focus will broaden to include the Rocky Mountain Region. The organization is non-partisan, capable of conducting, accepting, and evaluating research and proposed solutions. WSC policy documents will provide courses of action as well as associated implementation strategies. WSC will treat persons served as well as staff with the utmost of professionalism and respect.

1. Vision

Reasoned, researched, and non-partisan approaches to solving problems are needed to address issues affecting the Rocky Mountain Region.

2. Mission

Western Strategies Center develops non-partisan solutions and implementation plans for policy issues at the local, state, regional, and federal levels.

We:

- conduct research and/or build on research from other entities
- recommend courses of action for resolving problems
- develop strategic plans for successful implementation of these projects
- host seminars and forums to discuss issues and solutions
- provide academic opportunities to interns and resident scholars

3. Target Audience

The Target Audience for the policy documents will include, but are not limited to, the City Council of Colorado Springs, the County Commissioners of El Paso County, the Colorado Springs Chambers of Commerce, the Economic Development Corporation of Colorado Springs, and the state legislative delegation. These individuals and organizations have an interest in community improvement and economic development for the community. In addition, each study will have an associated group of stakeholders unique to that study. These stakeholders will also be part of the Target Audience and will cover the range of private, public, and government organizations that will be interviewed for the study, will review draft products and/or be involved in potential implementation plans.



4. Products

WSC will produce policy documents which will identify an issue or problem, research the issue in depth, and create a series of courses of action to address all or part of the issue or problem. Each course of action will have an implementation strategy.

WSC will also provide roundtables and forums for discussions of problems and issues. Roundtables are those events sponsored by WSC, tied directly to on-going projects. Findings of the roundtables will be incorporated into policy analyses. Forums will be WSC run events, sponsored by other organizations who will establish their own goals and objectives for the forum. WSC will publish the findings of forums as directed.

WSC will have both an intern program and a resident scholar program. Interns will be unpaid positions that may or may not be established in affiliation with a college or university for academic credit. Resident scholars will be placed with WSC by academic institutions and will pay tuition to WSC as part of an academic program.

5. Issue Study Production Process

Issues will be identified and selected based on a prioritized list presented by the CEO to the Board of Directors for discussion. Issues may be submitted by Board, staff and consultants of WSC, primary customers and outside agencies.

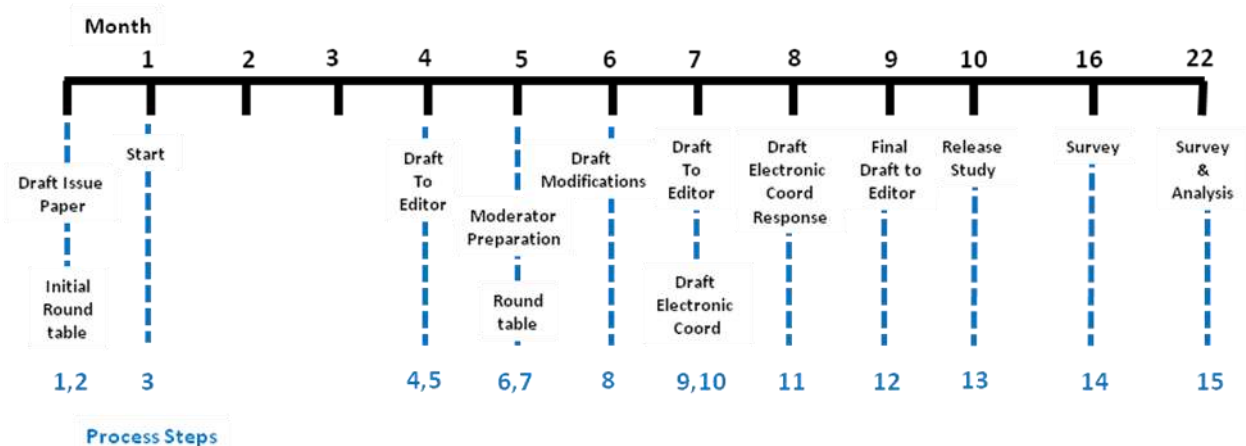
Finalized papers will be delivered to the City Council of Colorado Springs, the County Commissioners of El Paso County, the Greater Colorado Springs Chamber of Commerce, and the Economic Development Corporation of Colorado Springs. Final papers will be provided to all those interviewed as well as local, state, and federal organizations interested in the subject. After a policy paper is finalized and published, it will be reviewed for update on an annual basis.

Process Steps:

1. Submission and approval of the issue topic – based on a draft single page issue paper: problem statement, hypothesis, focus of study. Draft will also include a tentative chapter outline and interview list
2. Ten to fifteen days after the approval, an initial roundtable will be assembled to review the single page issue paper and provide general guidance for the study to proceed.
3. Start date is established – generally the first day of a month
4. The draft study will be completed ninety days after the start date.
5. Upon completion, the draft will be sent to the editor who will have thirty days to review the first draft and send it back to Studies and Analysis
6. Ten to fifteen days after the draft is completed roundtable moderators will review the draft and assemble to discuss the requirements for the general roundtables. Once the draft is reviewed, discussed and modified it will be sent to the roundtable participants.
7. Ten to fifteen days after the draft is completed and reviewed, there will be three, three hour roundtables scheduled over a week:



- a. Period 1 0830-1130 Monday
 - b. Period 2 1300-1600 Wednesday
 - c. Period 3 0830-1130 Friday
8. The draft will be modified based on roundtable feedback, thirty to forty-five days
 9. The modified draft is sent to the editor who will have fifteen days to update the draft
 10. After the editor creates a final draft, it will be sent to all participants for electronic coordination
 11. Fifteen days after transmission of the electronic draft, responses will be due back to WSC
 12. Fifteen days after response date, the final draft will be sent to the editor
 13. Thirty days after transmission of final draft to the editor, the study will be released
 14. Six months after the release of the study, primary and secondary target audiences will be surveyed. The survey will be constructed based on discussions and/or feedback from the target audiences and the evaluation metrics of WSC regarding study effectiveness.
 15. One year after the release of the study, primary and secondary target audiences will be surveyed, and the following questions will be used for future guidance:
 - a. Has the study resulted in any action?
 - i. Inclusion in an agenda of primary or secondary target audience
 - ii. Has a course of action been implemented in whole or part?
 - iii. Has a course of action been the topic of a community discussion in a forum or in the media?
 - b. Is the study complete based on survey responses?
 - c. Should the study be expanded?
 - d. Have new areas of study been identified?
 - e. Will any new study areas require a new and separate study?





Follow on and Refinement

The one year survey analysis will also provide an opportunity to create a focus team. A focus team will be made up of individuals with expertise in the general topic area, and the ability to refine a general topic, Health Care Infrastructure, into related or component areas for study. Continuing the Health Care Infrastructure example, the focus team will identify breakout issues from the original study as well as other related issues identified during the analysis. Thus, a single inital study may result in a number of subsequent studies that will refine the community with greater and greater detail.

6. Product Evaluation.

WSC document evaluation will follow two paths:

- a. Members of the target audiences will receive a survey instrument twice, at the six month and the one year anniversaries of the release of the study. These surveys will contribute to the one year evaluation of the study and the need for additional study and analysis.
- b. Evaluation will also include determining if any of the courses of action were selected by the primary or secondary target audiences for discussion or implementation or whether the COA was the subject for discussion in the community as part of a forum or event

7. Estimate to Complete One Policy Study

One Primary Policy Analyst	\$40,000.00
One Research Assistant	\$20,000.00
Two Subject Matter Consultants	\$40,000.00*
 Estimated total	 \$100,000.00

* Consultants will bill at \$100 per hour with 150 hours for the draft and 50 hours for the final document.

8. Projected Funding Sources

WSC will aggressively pursue start up funding through grant applications as well as identifying and partnering with high net worth individuals. In both cases we are looking for a three year commitment whenever possible. WSC will use targeted mailings as well as on-line access to create a continuous fundraising campaign. Forums and Resident Scholar programs will provide on-going funding streams. WSC will also offer consulting services to other organizations and individuals working on projects with specific support needs.

Budget estimates for the first year of operations, 1 Mar to 31 Dec 07, follow. The three cases are for minimum operations, funding of some salaries and full funding. These projections should be realized by the third year of operations 2009 at the latest. After the first year of operations, the Board of Directors will reassess the financial status of the organization and approve a five year plan for fundraising.



9. Competition and Market Niche

WSC is uniquely positioned in Colorado Springs and El Paso County as the only policy center focused specifically on local issues and solutions. In addition, the WSC methodology includes providing courses of action with associated implementation strategies for community leaders and decision makers.

10. Location and Organization

WSC is located at 711 South Tejon Street, Suite 200 in Colorado Springs, Colorado. Staff members are at the office location; consultants are part of a distributed network that may work from home or office in support of specific projects. Seminars and forums will be hosted at local area facilities specializing in those types of events.

11. Strategic Projection

WSC will grow, but will always strive to keep general overhead low to the benefit of the issue studies. Growth will be accomplished in general phase over the next five years with projections updated annually for the next five years

- a. **First three years of operations.** For the first three years of operations, WSC will provide the primary and secondary target audiences with high quality studies reflecting the goal of improving the community as defined by the study. Starting with the second year of operations, the fiscal year will align with the calendar year, 1 January 2008 to 31 December 2008. The first year of operations has a fiscal year running from 26 February 2007 to 31 December 2007, based on the date of incorporation. Budget projections at attachment 1 show goals for Stages 1 through 3 of funding. We will reach Stage 3 no later than 31 December 2009.
 - i. **Organization.** The organization of WSC will grow through 31 December 2007 to include additional researchers, consultants, resident scholars, interns, and volunteers as well as a full time events coordinator and an assistant for human resources. By 31 December 2009, the staff will grow to include a full time fundraising director and an assistant for management information systems.
 - ii. **Fundraising and Budget.** As outlined in attachments at the end of this plan, the budget is anticipated to rise to an annual requirement of over \$600,000. Most funding during this time will come from grants. Salaries will be paid based on cash flow until a stable annual budget is reached at or about the \$500,000 mark. During the first year of operations the board, in coordination with the staff, will create a five year plan for funding. This plan will be implemented when approved, no later than 31 December 2008.



- iii. **Operations.** For the first three years, WSC intends to average one to two studies per year. The rate of production may be modified based on the interest of consultants, the availability of funding, and the number of researchers, interns, and volunteers. WSC will provide consulting on projects as available and will conduct forums on the same basis. Consulting and forums are fee based.

- b. **Years Four and Five of Operations.** During this time period, WSC will continue to produce studies, complete expansion of the staff, and complete implementation of all programs.
 - i. **Organization.** By 2011 the organization of WSC will expand to include a full time bookkeeper, a human resources director and administrative assistant, and an administrative assistant for the fundraising director. This should complete the initial growth of WSC.

 - ii. **Fundraising and Budget.** Subject to the five year plan approved and implemented in coordination with the board of directors, WSC will decrease its reliance on grants and transition to funded studies and direct appeals to contributors as well as fee based consulting and forums.

 - iii. **Operations.** The number of studies, consulting contracts and forums will reflect the process outline as well as the increase in staff.

The following diagram illustrates the intended growth of WSC through year five of operations. Color coding indicates green positions currently filled and not anticipated to change, blue positions currently filled and will change, and red positions that are not filled yet, but should be by 2011.



31 December 2007 (v4)

Board of Directors
Howard Brooks
Catherine Coulter Calvin
Rosemary Harris
Manuel Navarro
Erv Rokke
Jim Stewart
Chris Tremaroli

Board of Advisors
Chris Findlater
Bobby & Renee Hartsliel
Alan Higbie
Dr. Kailish Jaitly
Justin Melat
Jay Patel

Grant Writing
Dr. Wendy Limbert
Dr. Pam Shipp

**President & Chief
Executive Officer**
Jay Fawcett

**Vice President & Chief
Operating Officer**
Sally Davis

**Vice President of
Programs**
Elaine Iler

Chief Financial Officer
Ann O'Brien

**Director of Studies
& Analysis**
Dr. Wendy Limbert

Researchers
Steven Beard

**Director of
Academic Programs**
Dr. Tom Mowle

Event Coordinator

Consultants
Dave Anderson
Ed Herlik
Dr. Mark Johnson
Dr. Pam Shipp
Stephanie Willis

Interns
Bethany Miller
Anna Nemanich

**Human Resources
Assistant**

Volunteers

**Resident
Scholars**



**Western Strategies Budget Estimates
FY 2007**

Office ADP

laptop with docking station support	\$2,000.00	4	\$8,000.00
wireless internet hub	\$300.00		\$300.00

Rent

	\$1,400.00	9	\$13,600.00
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Furniture

Workspace	\$300.00	5	\$1,500.00
Reception			\$600.00

Utilities

Internet set up	\$59.99		\$59.99
Internet	\$69.25	10	\$692.50
Telephone	\$153.00	10	\$1,530.00

Web Site

Initial setup	\$1,000.00		\$1,000.00
Monthly Hosting	\$30.00	9	\$270.00

Office Supplies

Set up	\$1,000.00		\$1,000.00
Monthly	\$200.00	9	\$1,800.00

Marketing

\$10,000.00

Non Personnel Total

\$40,352.49

Salaries

9 months \$90,000.00

Travel

\$1,000.00

Associates

\$100.00 per hour \$40,000.00

Total 1

\$171,352.49



FY 2008

Rent	\$1,400.00	12	\$16,800.00
Furniture			
Reception			\$600.00
Utilities			
Internet	\$69.25	12	\$831.00
Telephone	\$153.00	12	\$1,836.00
Web Site			
Updates	\$1,000.00		\$1,000.00
Monthly Hosting	\$45.00	12	\$540.00
Office Supplies			
Monthly	\$200.00	12	\$2,400.00
Marketing			\$20,000.00
Non Personnel Total			\$44,007.00
Salaries		12 months	\$252,000.00
Travel			\$5,000.00
Associates	\$100.00	per hour	\$50,000.00
Total 2			\$351,007.00



FY 2009

Rent	\$1,400.00	12	\$16,800.00
Utilities			
Internet	\$69.25	12	\$831.00
Telephone	\$153.00	12	\$1,836.00
Web Site			
Updates	\$1,000.00		\$1,000.00
Monthly Hosting	\$45.00	12	\$540.00
Office Supplies			
Monthly	\$200.00	12	\$2,400.00
Marketing			\$50,000.00
Non Personnel Total			\$73,407.00
Salaries		12 months	\$504,000.00
Travel			\$15,000.00
Associates	\$100.00	per hour	\$60,000.00
Total 3			\$652,407.00