



**M E M O**

**County  
Administrator**

Robert W. Wilson  
701-241-5770  
wilsonro@casscountynd.gov

TO: County Commissioners  
FROM: Robert W. Wilson  
DATE: April 13, 2022  
SUBJECT: Strategic Plan Agreement

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This item has been discussed at several previous Board meetings. Attached is the agreement with JM Strategies to provide Strategic Planning services to Cass County in 2022.

This is a budgeted item and a scheduled update for the County's strategic plan.

The cost is \$5,000. This is within a Department Head's spending authority, but there was a previous discussion that the agreement would be scheduled for consideration as a consent agenda item. I will work with Mr. Matthews to schedule the required sessions through the late summer and early fall of this year.

**SUGGESTED MOTION: Authorize the Chair to sign Proposal for Strategic Planning Services with JM Strategies.**

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211 Ninth Street South  
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[www.casscountynd.gov](http://www.casscountynd.gov)

# PROPOSAL FOR STRATEGIC PLANNING SERVICES

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Cass County Government

April 2022

**Primary Contact Information:**

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STRATEGIES

# PROPOSAL FOR STRATEGIC PLANNING SERVICES

**Prepared For:** Cass County Government

**Prepared By:** Jason Matthews, Owner  
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## 1. PROPOSED SCOPE OF WORK

JM Strategies (Consultant) will provide services that will update Cass County Government's Strategic Plan. To achieve this objective, JM Strategies will utilize a comprehensive planning approach that includes the following proposed elements...

- **Managing the Planning Process:** In collaboration with Cass County Administrator Robert Wilson, JM Strategies will manage and facilitate the process, including developing an engagement plan and project timeline.
- **All-Staff Online Survey:** Comprehensive research is the foundation of all effective strategic planning. As such, this updated plan will be anchored in the feedback collected through an all-staff survey. In consultation with the county administrator, JM Strategies will develop and administer an online survey for all Cass County government employees. The survey will...
  - 1) Assess attitudes and perceptions of Cass County government's mission, vision, and services;
  - 2) evaluate key elements of the current strategic plan;
  - 3) and identify internal and external issues impacting county government.

The survey data will be examined for common themes and areas of focus, which will provide the framework for the planning process.

- **Identification:** JM Strategies will present the findings to invited county officials in a report and professional briefing (either in-person or virtual). Based on the findings of the all-staff survey, designated county officials and JM Strategies will identify areas of focus and issues to address in the planning process. Following identification of areas of focus and issues, the Consultant and the county administrator will determine the planning model and appropriate metrics.
- **Facilitating the Planning Retreat:** JM Strategies, in collaboration with the county administrator, will organize an in-person planning session with invited county officials. The session will take place over the course of one or two business days. The session's agenda will be collaboratively developed.
- **Draft and Submit Updated Plan:** JM Strategies will write the updated plan and present it to the county administrator for review and revisions. Upon incorporation of changes, the plan will then be presented to invited county officials for further feedback.
- **Submit Final Updated Plan:** JM Strategies will produce and present a final updated Strategic Plan for final approval.

## 2. JM STRATEGIES' APPROACH TO STRATEGIC PLANNING

Strategic planning is an important process that allows organizations to create a focused roadmap for their work. The planning process should be holistic and inclusive and provide not only an assessment of the current operational environment, but also an educated guess about – and an opportunity to shape – the future operational environment the organization will encounter. From JM Strategies' perspective and experience, three essential elements comprise any successful strategic plan...

- 1) **Identifying or Affirming an Organization's Purpose.** Creating or reviewing its mission and vision.
- 2) **Defining or Affirming Its Values.** Identifying and applying the organization's values to its work.
- 3) **Determining What It Will Do and How It Will Do It.** Setting specific goals and objectives and defining the practical steps necessary to achieving desired outcomes.

Fortunately, Cass County understands the value and importance of strategic plans. JM Strategies will develop a process that will complement current initiatives and utilize a full stakeholder engagement approach that will intentionally seek feedback from all employees and relevant stakeholder groups. As information is gathered, analyzed and refined, it creates a narrowing effect and enables Cass County to coalesce around common themes and goals.



Based on JM Strategies' experience, these four factors are critical to a productive and rewarding planning process...

- **Engagement:** Engaging with stakeholders at all levels which provides input and ensures commitment to the final plan.
- **Communication:** Stakeholders must understand their roles in contributing to the planning process and in ultimate implementation of the plan. Everyone should know both the importance of strategic planning to an organization's success and their responsibility in working towards that success.
- **Challenging:** Complacency must be challenged in the process. Simply saying "we've always done this" or "we tried that and it didn't work" are banished phrases in the planning process.
- **Clarity:** Goals and objectives must be clearly understood. Failure takes up residence when goals and objectives are vague and overly broad.

When understood and followed in the planning process, these four factors result in the creation of strategic plans where organizations understand the big picture, are focused on what truly matters, and are empowered to make smarter decisions.

### 3. ABOUT JM STRATEGIES

#### 3.1 Company Profile

JM Strategies LLC was founded in 2013. The firm provides strategic planning, facilitation, research, public relations, association management, and public affairs consulting services to nonprofits, businesses, city and county governments, state agencies, trade associations, and policy coalitions. JM Strategies is owned and operated by Jason Matthews, who is the firm's sole employee and will be the sole consultant on this project.

#### 3.2 Consultant Qualifications

Jason Matthews, owner of JM Strategies, has more than a decade of experience in strategic planning, facilitation, research, public relations, association management, and public affairs. He is an experienced facilitator adept at assisting organizations in identifying their members' strengths, refocusing on their core mission, revitalizing their boards, increasing their membership, raising their public profile, and deepening their impact. When it comes to communications and public affairs, Jason has crafted winning strategies for clients in the private and public sectors. He has advised clients ranging from the nation's largest independently owned coal company to regional businesses, nonprofits, and public policy groups. Jason has directed state and federal lobbying initiatives and has served as a senior strategist on four successful bipartisan statewide measure campaigns.

Jason earned a bachelor's degree in political science from the University of North Dakota and master's degree in management from the University of Mary.

Jason is an adjunct political science instructor at Bismarck State College (BSC) and also teaches for the Osher Lifelong Learning Institute (OLLI) and Humanities North Dakota. Involved in various community and professional activities, he is the president of the Missouri Valley Heritage Alliance (formerly the Fort Abraham Lincoln Foundation), a member of the Bismarck Rotary Club, the Sons of the American Legion, and previously served as the president of the Friends of the Bismarck Public Library. In 2016, Governor Jack Dalrymple appointed Jason to the North Dakota Library Coordinating Council; Governor Doug Burgum reappointed him in 2017 and 2019.

Jason is a 2007 graduate of the Bismarck-Mandan Chamber's Leadership Bismarck-Mandan program and was named in 2014 as one of the "Forty Under 40" business and community leaders by the *Bismarck Tribune*. He lives in Bismarck with his wife and two daughters.

#### 3.3 Clients

JM Strategies has directed strategic planning, research, and facilitation projects for these clients...

##### **Businesses and Economic Development Groups**

- Bismarck Mandan EDC
- Bowman County Development Corporation
- Jamestown-Stutsman Development Corporation
- Hebron Economic Development Corporation
- Lewis & Clark Development Group
- N.D. Association of Regional Councils
- Southwest REAP Investment Board
- Wahpeton CDC
- Breckenridge (MN) Port Authority
- Dakota Western Bank
- Tri-Energy Cooperative

##### **Professional, Advocacy, & Trade Associations**

- Greater North Dakota Chamber
- North Dakota Realtors Association
- North Dakota Association of Counties
- North Dakota Head Start Association
- North Dakota Library Association
- North Dakota Medical Association
- North Dakota United

## Nonprofits

- North Dakota Community Foundation
- Early Explorers Head Start & Early Head Start
- Missouri Valley Coalition for Homeless Persons
- Southwest Area Career & Technical Academy
- Friends of the Rail Bridge
- Camp of the Cross Ministries
- Friends of Lake Sakakawea

## Government

- Cass County Government
- N.D. Dept. of Corrections & Rehabilitation
- N.D. Department of Human Services
- North Dakota Head Start Collaboration Office
- North Dakota State Library
- Tennessee State Library & Archives
- City of Beach, North Dakota
- City of Mandan, North Dakota
- Dunn County Government

### 3.4 Client References

Cass County Government may contact any of the following clients for references...

- **City of Beach**  
Kim Gaugler, City Auditor – (701) 872-6087 / cityofbeach@midstate.net
- **Bismarck Mandan Chamber EDC**  
Brian Ritter, President – (701) 223-5660 / britter@bmcedc.com  
Nathan Schneider, Vice President – (701) 223-5660 / nschneider@bmcedc.com
- **Lewis & Clark Development Group**  
Brent Ekstrom, Executive Director – (701) 667-7624 / brent@lcdgroup.org
- **Southern Valley Economic Development Authority (SVEDA)**  
Justin Neppel, SVEDA Executive Director – (701) 671-2682 / justin@sveda.biz  
Perry Miller, Wahpeton City Council Member – (701) 640-1974 / pdmiller@midco.net
- **North Dakota State Library**  
Mary Soucie, State Librarian – (701) 328-4622 / msoucie@nd.gov
- **Tennessee State Library & Archives**  
Jennifer Cowan-Henderson, Director of Planning & Development – (615) 741-1923 / jennifer.cowan-henderson@tn.gov
- **Dunn County Government**  
Tracey Dolezal, County Auditor & Treasurer – (701) 573-9900 / tracey.dolezal@dunncountynd.org
- **North Dakota Association of Counties**  
Terry O. Traynor, Executive Director – (701) 328-7300 / terry.traynor@ndaco.org

### 3.5 Additional Experience

JM Strategies has also provided public relations and advocacy services for these public affairs firms: Locust Street Group (Washington, DC), LS2 Group (Des Moines), and Pearson Public Affairs (Oklahoma City).

#### 4. ASSUMPTIONS & ACCOUNTABILITIES

While scoping this project, JM Strategies used the following assumptions in crafting this proposal:

- 1) Cass County Administrator Robert Wilson will be the key point of contact for JM Strategies.
- 2) JM Strategies will mostly work remotely from Bismarck and engage in meetings via Zoom (or Teams), telephone, email, and other electronic means with the county administrator and any other designated representatives.
- 3) JM Strategies will travel to Fargo up to three times to meet with the planning team, facilitate the planning retreat, and present the final updated plan to the County Commission.
- 4) The process will conclude no later than October 28, 2022.
- 5) Modifications to the scope of work and fee structure will be made with the agreement of both parties.

JM Strategies' accountability includes:

- Regularly scheduled meetings/telephone calls with the county administrator and other designated representatives.
- Maintain client confidentiality.
- Adherence to agreed-upon deadlines.
- Progress reports via email, telephone, or in-person.

Cass County Government's accountability includes:

- Access to designated representatives on mutually convenient dates and times.
- Access to any relevant records – excluding confidential files – which may be of value to this project.
- Providing meeting room(s), supplies, and use of printers/copiers and other necessary materials and support for the planning session and project meetings.
- Mutual agreement on dates and times for the online survey, planning retreat, and project meetings.
- Paying for lodging costs.
- Payment in conformance with the terms as listed below.

Our joint accountabilities includes: We will...

- Mutually agree to a schedule for all project deliverables.
- Alert each other of anything we learn that may materially affect the success of the project.
- Respect each other's confidentiality and proprietary materials and approaches.
- Achieve reasonable accommodations for any unforeseen developments, priorities, conflicts, etc.

#### 5. FEES FOR SERVICES & TERM OF THIS PROPOSAL

A complete project price of \$5,000 is proposed for this project. This amount covers project management, client meetings, survey research, and facilitation of the planning retreat. Cass County will be responsible for arranging and paying for lodging costs. JM Strategies waives all mileage costs for this project.

Based on JM Strategies' previous work with Cass County, no down payment is required to commence work. JM Strategies will submit an invoice for payment in full to the county administrator upon approval of the updated plan. Cass County will have 30 business days from receipt of the invoice to pay.

JM Strategies will employ the services of a professional graphic designer to design and layout the final Strategic Plan. Costs for these services are included in the final price.

**“Do Not Exceed” Pricing Principle:** JM Strategies believes the best billing process is the simplest and most straightforward from the very outset of any project. As such, JM Strategies operates under a “Do Not Exceed” pricing principle. The fee quoted in this proposal is the one the Client will pay. Of course, unforeseen developments do occasionally occur. In such an unlikely event, JM Strategies and the county administrator will achieve a reasonable accommodation to resolve the matter.

## CONSULTING AGREEMENT

IN WITNESS THEREOF, the parties have agreed to the work described herein and to the terms and conditions provided and agreed to.

**JM Strategies, LLC:**

**Cass County Government:**

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Date:

Date:



