## Appendix C: Agency Strategic Planning Horizon Worksheet

This worksheet contains all the fields in Horizon. Agencies should complete this worksheet before entering their plan data into Horizon. Using the worksheet will facilitate review, approval and data entry.

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| 1. | Agency:  Select the agency name from the drop down menu. | |
| 2. | Mission:  *The mission explains the purpose of the organization and why the agency exists.* | |
| 3. | Vision:  *The vision paints a picture of a desired future, one that is both challenging, yet possible to attain. It defines and provides an optimistic view of where the organization wants to be in the future.* | |
| 4. | Core Values:  *Core values are those ideas and beliefs that really matter to the organization; the enduring tenants to guide the work of the organization.* | |
| 5. | Challenges:  Identify the key challenges facing your agency for this planning cycle. The challenges are the critical issues that result from the agency’s environmental scan. Consider changes to federal and state laws; policies or mission changes; trends affecting services, workforce and technology; risks identified through audits or disaster planning; demographic trends; customer needs; budget allocations; workforce gaps; and other internal and external factors affecting operations and services. | |
| 6. | Workforce Planning:  The Department of Administrative Services (DOAS) relies on workforce planning data from the agency strategic plans to develop the state’s enterprise workforce plan.  Workforce Gaps:  What workforce gaps have you identified that may impede achievement of the agency mission or strategic goals? (Check all that apply.)  ( ) Skill levels/competencies  ( ) Diversity/EEO gaps (age, race, gender, ADA)  ( ) Staffing levels  ( ) Turnover/retirements  ( ) None  ( ) Other: ­­­­­­­­­­­­­­­­ | | |
| 7. | Critical Positions:  *Which critical positions and job families are most difficult to fill, develop and retain?* | | |
| 8. | Workforce Strategies:  What strategies will you implement to ensure your workforce is equipped to carry out its mission and strategic goals? (Check all that apply.)  ( ) Employee development (e.g., training, mentoring, job shadowing)  ( ) Succession planning  ( ) Rewards and recognition (e.g., incentive pay, pay for performance, acknowledgement of accomplishments)  ( ) Work-life Balance (e.g., telework, alternate work schedules)  ( ) Recruitment  ( ) Re-structuring programs or positions (e.g., consolidate or automate functions)  ( ) None  ( ) Other | | |
| 9. | Annual BLLIP Updates  Georgia state agencies enter facility and real property information in a consolidated building data warehouse called Building, Land and Lease Inventory of Property (BLLIP). The State Properties Commission uses this data for facility and space planning. Therefore, it is important that agencies update the system data regularly.  Indicate below whether the agency’s facility manager has updated BLIPP for the current fiscal year. If not, please ask the agency facility manager to update the agency facility and space information at: <https://www.realpropertiesgeorgia.org/bllip/Home.do;jsessionid=BECF0520851BECCE49599F7916CEA4A8.tomcat02f>  ( ) Yes, agency updated BLLIP this fiscal year  ( ) No, BLIPP has not been updated. I have contacted the facility manager to request completion of the annual BLLIP update. | | |
| 10. | Enterprise Ideas:  Agencies are encouraged to share ideas and solutions that would improve state services. List any ideas and suggestions for cost saving measures and efficiency improvements that can be implemented in your agency or across state government. | | |
| 11. | List of Documents Attached  Agencies are encouraged to attach supplemental information that will enhance or support the content of the strategic plan information in Horizon. For example, many agencies prepare formal strategic plan documents for their stakeholders and oversight boards. Other agencies may have performance reviews, program evaluations or other assessment tools that provide contect for their strategic goals. | | |
| 12. | Agency Goal:  A result or outcome one is trying to achieve. Typically, agencies have between 3 to 5 high-level goals in an agency strategic plan. | | |
| 13. | Measurable Objective (X as of Date to Y by Date):  Each goal is required to have at least one measurable objective to gauge the agency’s success at achieving the strategic goal. Measurable objectives need to be “SMART” (Specific, Measurable, Attainable, Relevant, Time-bound). Measurable objectives are to be stated as from “X as of Date to Y by Date,” where X is the baseline performance and Y is the performance you hope to achieve by the end of the four-year planning cycle. | | |
| 14. | State Policy Area/Goal:  Review the state strategic goals and identify up to two state strategic goals to which the agency strategic goal best aligns. | | |
|  | **Agency Strategy/Initiative** *(Complete this section for each strategy.)*  A strategy offers a coherent set of actions that has a reasoned chance of working to improve results. The strategy articulates what the agency will do to achieve the goal. | | |
| 1. | Strategy:  Succinctly describe what the agency will do to achieve the strategic goal. The strategy appears in the Executive Summary report for the agency strategic plan. Please be descriptive enough that readers can understand how the agency plans to achieve its stated goals. A strategy starts with a verb; a title is not sufficient. | | |
| 2. | Strategy Detail:  The strategy detail provides additional information about the strategy and is accessed by enterprise support agencies and Horizon users seeking more explanation about the strategy or initiative. | | |
| 3. | Anticipated Benefits (Check all that apply)  Select the appropriate response describing anticipated benefits of the strategy once implemented. | | |
|  | ( ) Improved or enhanced services  ( ) Improved operations or efficiency  ( ) Improved client outcomes  ( ) Risk mitigation (security, public safety, disaster preparedness, address audit findings) | ( ) Additional revenue/cost savings  ( ) Improved employee morale/more qualified workforce  ( ) None of the above | |
| 4. | Contact Information:  Please provide contact information for the person responsible for the success of this strategy. This is the person OPB and other enterprise support agencies would contact in the event of follow-up questions.  🗹 (Click here to populate fields from staff currently listed in the Horizon system)  Name:  Title/Position:  Telephone:  Email: | | |
|  | **Budget Implications** *(Complete this section for each strategy.)* | | |
| 5. | Budget Programs Affected  Which agency budgeted programs are impacted by this strategy? | | |
| 6. | Estimate the costs of implementing this strategy. Indicate what is included in this estimate and whether procurement is needed. Once implemented, will the project have ongoing maintenance or operational costs?  Cost Estimate:  What does this cost estimate include?  Will there be ongoing annual operating or maintenance costs? ( ) No ( ) Yes | | |
| 7. | Budget Impact:  Will implementation of this strategy be done with funds within the agency base, require a state budget enhancement or be paid from another funding source?  ( ) Base budget  ( ) State funding enhancement (includes capital outlay requests)  ( ) Other funding source (e.g., federal funds or grant)  ( ) None | | |
| 8. | Start Date:  When do you plan to start working on this strategy?  ( ) FY 2013 or prior  ( ) FY 2014  ( ) FY 2015  ( ) FY 2016 | | |
| 9. | Critical Deadlines:  Are there any critical external deadlines related to this strategy? This may include statutory implementation dates or mandatory compliance deadlines.  ( ) No  ( ) Yes. If yes, provide date and explain | | |
| 10. | Key Agency Partners (Check all that apply.)  Identify the key partners needed for successful implementation of the strategy. These should be partners, rather than stakeholders. If you will need technical assistance from the support agencies for procurements, staffing or technology investments, please include the appropriate enterprise support agencies among your agency partners. | | |
|  | State Agencies  ( ) Office of Planning and Budget  ( ) Department of Administrative Services  ( ) Georgia Technology Authority  ( ) State Properties Commission  ( )  *(select from Horizon menu via BudgetNet)* | ( ) Federal agencies  ( ) Local governments (i.e., city or county)  ( ) Non-governmental or non-profit organizations  ( ) Private sector | |
|  | **Staffing Implications** *(Complete this section for each strategy.)* | | |
| 11. | Staffing Implications: (Select all that apply.)  A strategy has staffing implications if it affects the amount, composition or effectiveness of the workforce, or if its implementation would be made more successful through strategic workforce planning. Select the staffing implications related to the strategy.  ( ) Increases staffing levels by \_\_\_\_ contracted/state FTEs  ( ) Decreases staffing levels by \_\_\_\_ contracted/state FTEs  ( ) Re-structures program or positions  ( ) Requires development of skill sets or competencies  ( ) Requires targeted recruitment  ( ) Other  ( ) None *(If none, skip to IT Dependencies.)* | | |
| 12. | Description of Staffing Implications:  Provide additional information explaining the staffing implications selected above*.* | | |
|  | **IT Dependencies** *(Complete this section for each strategy.)* | | |
| 13. | IT Dependencies: (Select all that apply.)  A strategy is IT dependent if its success depends on a technology solution or IT support. The Georgia Technology Authority uses this information to plan for enterprise-wide technology needs and help agencies use technology more effectively. This information is instrumental in creating the Georgia Enterprise IT Strategic Plan. Please indicate whether this strategy is IT-dependent and if so, which of the following categories best describe how technology will be used.  ( ) Re-design business processes (i.e., re-engineer or automate processes)  ( ) Improve customer access to online services  ( ) Improve workforce mobility (i.e., remote access to agency applications)  ( ) Expand the use of data for decision making (e.g., business intelligence, big data, decision support, etc.)  ( ) Expand the ability to share data with other organizations  ( ) Establish or expand network connectivity  ( ) Improve agency business continuity or disaster recovery  ( ) Other (please describe briefly):  ( ) None *(If none, skip to Facilities or Space Implications.)* | | |
|  | **Facilities or Space Implications** *(Complete this section for each strategy.)* | | |
| 14. | Facilities or Space Implications  A strategy has facilities or space implications if it requires acquisition of additional property, relocates or reconfigures an office space or state facility, or if it would be made more successful through strategic facility planning. The State Property Commission uses this information to identify and plan for enterprise and agency space management and property acquisition needs.  ( ) Requires new construction, facility renovation or facility consolidation  ( ) Increases or decreases office space or other facility  ( ) Requires a land acquisition  ( ) None *(If none, skip to Plan Submission.)* | | |
| 15. | Description of space or facility request:  Describe the space or facility project in greater detail, including any requirements or specifications related to the project. | | |
| 16. | Number of People Affected:  Estimate the number of people (e.g., staff, students, visitors) affected by this space or facility request. | | |
| 17. | Space or Facility Location:  Identify the county or counties in which the affected space or facility will be located.  ( ) county ( ) county | | |
|  | **Plan Submission** | | |
| 18. | Review/Approval  Once submitted, agency plans are considered final and are posted to OPB’s web site. OPB encourages agencies to proof content for spelling and readability prior to submission.  🞎 Agency management has approved strategic plan content for submission to OPB. | | |