



Governor's Office of  
PLANNING AND BUDGET  
THE STATE OF GEORGIA

# Agency Strategic Planning

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For FY 2018



# Introduction to the 2018 Cycle

- The Office of Planning and Budget
  - Coordinates the state's strategic planning process
  - Ensures plans are consistent with state goals
  - Works with other ESA agencies to assist with planning and initiatives
- Our goal is to make strategic planning
  - Valuable
  - Flexible
  - Focused



# The Value of a Strategic Plan

- A strategic plan should
  - Communicate a clear direction for employees, customers, and stakeholders
  - Be a point of reference for evaluating budget requests
  - Give ESA agencies an idea of assistance needed to help support your agency and interagency initiatives



# Budget Requests

- Strategic plans are not budget requests
  - Budget requests should be submitted in September per the instructions sent out by OPB in the summer
  - Approval of strategic plans does not constitute approval of any budget requests
  - While an expected cost may be included in a plan, it is not a strategy itself



# ESA Page and Review

- ESA One Pager
  - Separate document from plan
  - Summarize budgetary, technological, workforce, and capital asset needs referenced in the plans
  - Include contact information for a follow-up from ESA agencies
- Review Process by OPB
  - Will provide feedback on plan receipt and review
  - Will generally provide forward-looking feedback



# Performance Measure Clarification

- Agency Plan Measures
  - No quarterly or biannual updates
  - Provide progress/status updates for key objectives and strategies in annual plan update
- Program Performance Measures
  - Report as usual to BudgetTool in September
- Strategic Indicators
  - Being reevaluated and will provide update soon



# To Update or To Create?

- When updating your plan, keep in mind new information, such as
  - Completed Goals/Strategies
  - Funding
  - Legislative/Policy changes
  - Trends in plan measures
- Creating a new plan is an option if you do not have an existing plan or want to start from scratch
- The provided guidelines can help with plan creation or improvement



# Components of a Good Strategic Plan

- Mission Statement
- Vision
- Environmental Scan
- Goals
  - Measurable Objectives
  - Strategies
- Summary ESA Page





# Mission and Vision

- Mission
  - The purpose of the organization and why the agency exists
  - Ex: *The mission of the XYZ agency is to provide access to affordable, quality healthcare to Georgians through effective planning, purchasing, and oversight.*
- Vision Statement
  - An optimistic view of the desired future; should be realistic, but challenging
  - Ex: *The ABC agency will be recognized as the guiding force for innovative public policy and sound fiscal management.*



# Environmental Scan

- A thorough analysis of the organization's internal and external environment and relevant trends.
- Information that may be used include
  - Workforce trends
  - Economic indicators
  - Technology initiatives
  - Employee and customer feedback
  - Previous program results



# Goals and More

- Goals
  - High-level and spans over the duration of the plan
  - Ex: *Improve the customer experience for licensing applicants.*
- Measurable Objectives
  - Measures the progress of the goals
  - Ex: *Decrease call hold times from 20 minutes in 2014 to 5 minutes in 2016, based on a monthly average.*
- Strategies
  - Actions taken to achieve goals
  - Ex: *Enhance website self-service options, implement interactive voice recognition (IVR) technology*



# Format of Measurable Objectives

- The X as of date to Y as of date format works well but is not required
- The most important components for objectives:
  - They show how the goal is being met
  - It is clear how success will be measured



# Design and Templates

- The templates were provided for the plans themselves and only if you needed it
- Designs are entirely up to the agency with only the requirements that it be easy to read and to print
- Talk to us if you have questions about any unique designs or formats



# Submission

- Plans are due **June 30<sup>th</sup>, 2017**, and will be submitted to [plans@opb.Georgia.gov](mailto:plans@opb.Georgia.gov)
  - Word, PDF or Excel
  - Easily readable when printed out
- OPB will be available to meet individually for plan guidance
  - Anna Wrigley Miller: [Anna.Miller@OPB.Georgia.gov](mailto:Anna.Miller@OPB.Georgia.gov)
  - Meaghan Ryan: [Meaghan.Ryan@OPB.Georgia.gov](mailto:Meaghan.Ryan@OPB.Georgia.gov)