Commonwealth of Virginia
Executive Branch Strategic Planning, Service Area Planning, and Performance-Based Budgeting

Strategic & Service Area Planning: Overview and Training

August 2007

Office of the Secretary of Finance
Department of Planning and Budget

Introductions

Facilitators

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Agenda

- Opening Remarks & Session Objectives
- Administrative Items: Facilities, Session Guidelines, Lunch, etc.
- How Can We Help?
- Training Session, Part 1. Strategic & Service Area Plan Components
  - Refresher
  - What has changed?
- Training Session, Part 2. Improving Strategic & Service Area Plans
  - SWOT Analysis Overview
  - Mission
  - Objectives
  - Measures
  - Key Objective and Key Measures
  - Strategies
- Review and Questions
- Training Session Feedback

How Can We Help?

To help us provide you the best value in attending this training session, identify ways in which we can help you improve your agency's plans.

What questions, issues or concerns do you have in reference to planning?

Part 1: Strategic and Service Area Plan Components - *Structure Overview*

AGENCY STRATEGIC PLAN STRUCTURE

Mission
Vision
Values (optional)

Executive Progress Report
- Current service performance
- Productivity
- Major initiatives & related progress
- Virginia ranking & trends
- Customer trends & coverage
- Future direction, expectations & priorities
- Impediments

Background Information
- Statutory authority
- Customers: customer base; anticipated changes in base
- Partners (optional)
- Products & services: current products and services, factors impacting products and services, anticipated changes to products and services
- Resources: financial summary, human resource summary, information technology summary (***New: Instructions for IT summary)***, capital investments summary

Goals
- Goal: goal summary and alignment
- ***New: Standard goal, objective and measure for "Commonwealth Preparedness"***
- ***New: Standard objective and measure for "Agency Administration" if there is not an Administration & Support or similar service area in the agency***
- Objectives, measures & strategies (optional)
- Measurement information (for listed measures): measure, measure type, measure frequency, data source & calculation, baseline, target
- Strategies

Appendices
A. Information technology
B. Additional statutory authority information (optional)
C. Organizational structure (optional)

SERVICE AREA PLAN STRUCTURE

Background Information
- Service area description
- Alignment to mission
- Statutory authority
- Customers: customer base; anticipated changes in base
- Partners (optional)
- Products & services: current products and services, factors impacting products and services, anticipated changes to products and services
- Resources: financial summary, human resource summary (optional)

Objectives & Measures
- Description
- ***New: Standard objective and measure for "Agency Administration" if there is an Administration & Support or similar service area in the agency***
- ***New: Identification of key objective(s) and key measures***
- Alignment
- Priority
- Measurement information: measure, measure type, measure frequency, data source & calculation, baseline, target
- Strategies

Appendices
A. Additional statutory authority information (optional)

Your initial plan should not be constrained by resources. Instead, anticipate the base budget and any decision packages you will be submitting when developing your objectives, targets and strategies. Your plans will need to be revised to bring them in line with available resources at future points (i.e., based on the introduced budget in January or the final budget approved by the General Assembly).

5

Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

1. Web-enabled system for recording and reporting plan information (page 7)

2. Information technology summary and appendix format and requirements (pages 8-22)

3. Inclusion of a standard objective and associated measure for each agency for Commonwealth Preparedness (page 23)

4. Information about the impact that an aging population has on the agency (page 24)

5. Inclusion of a standard objective and associated measure for each agency for Agency Administration (page 25)

6. Identification of key objectives and key measures; standard format for phrasing key objectives and key measures (page 26)

7. Completion of a S.W.O.T. analysis (page 27; details on pages 28-33)

Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

Web-enabled System for Recording and Reporting Plan Information

- Scott Hubbard, DPB

- Replacement for Microsoft Access database used in last biennium

- Access to system
    - www.vaperforms.viginia.gov
    - Login I.D. and password
    - New users: complete an access request form located on the left-hand navigation bar

- Web application: pre-populated with your latest plan information to serve as a base for this planning cycle; may not include the objectives and measures (key and non-key) as the information may not have been current

- Spell check alternatives

- Whom to contact for system problems or user training

Information Technology Summary Format and Requirements

- Constance Scott, VITA

- A new portfolio management system called ProSight has been implemented to capture IT strategic planning information and generate Appendix A. CATSPA has been retired and is available for read only, historical purposes.

- Two new tables have been added to the IT Summary Section:

  - Agency IT Current Services, and

  - Projected Total IT Budget, which is the Agency IT Current Services + Proposed IT Investments.
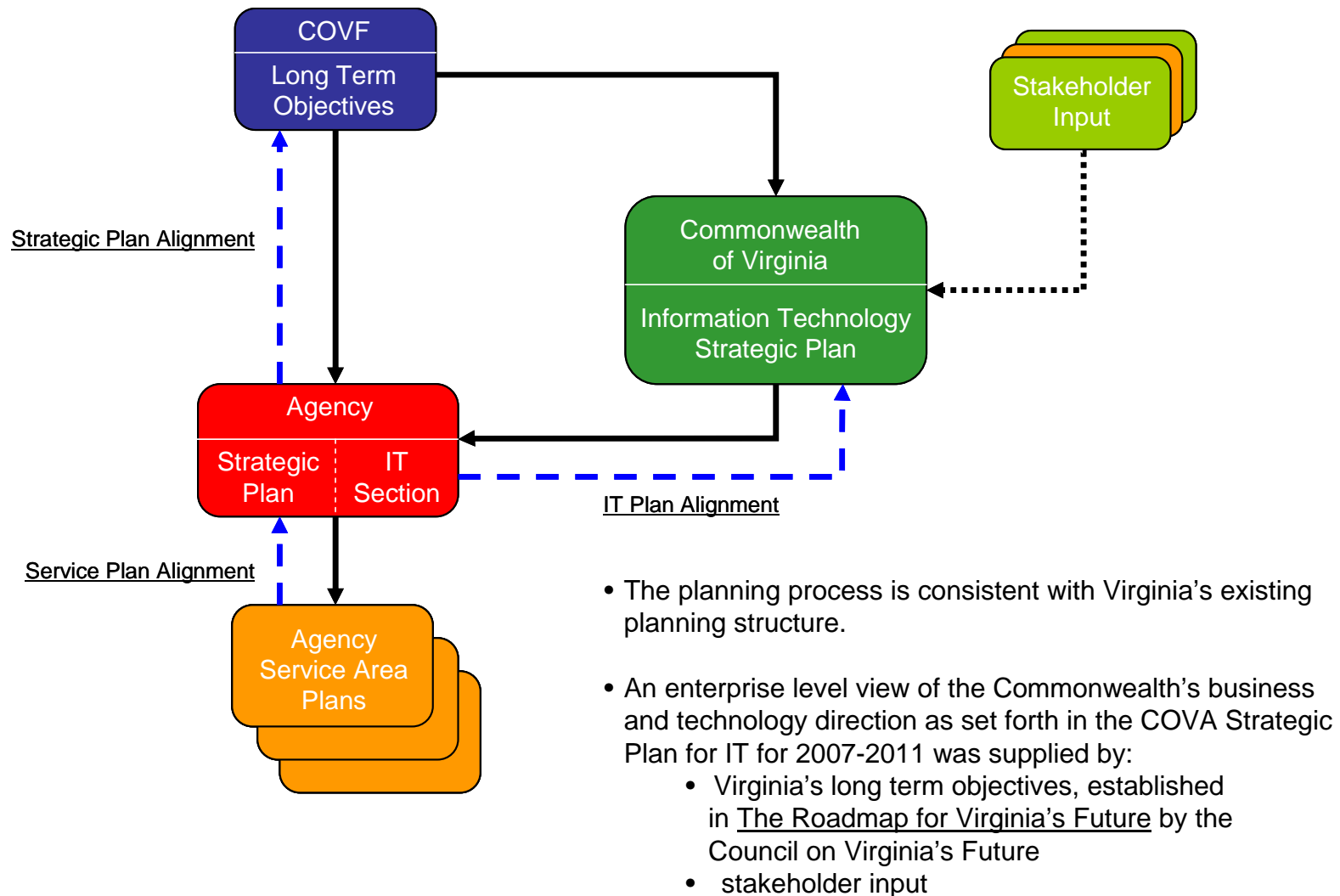
Presentation Topics:

• Review the IT Components of the Agency Strategic Planning Process
  - Information Technology Summary
  - Appendix A
  - Funding Updates
  - Certification
• Question & Answer Discussion

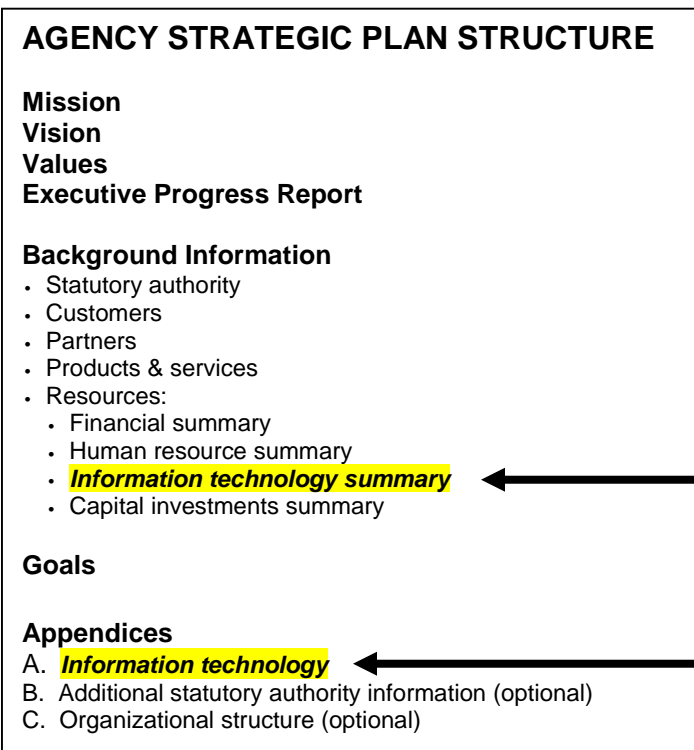# Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

Information Technology Summary: The ITSP Process

COVF

Long Term Objectives

Stakeholder Input

Strategic Plan Alignment

Commonwealth of Virginia

Information Technology Strategic Plan

Agency

Strategic Plan | IT Section

IT Plan Alignment

Service Plan Alignment

Agency Service Area Plans

- The planning process is consistent with Virginia's existing planning structure.

- An enterprise level view of the Commonwealth's business and technology direction as set forth in the COVA Strategic Plan for IT for 2007-2011 was supplied by:
    - Virginia's long term objectives, established in The Roadmap for Virginia's Future by the Council on Virginia's Future
    - stakeholder input

Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

Agency Strategic Plan Structure

AGENCY STRATEGIC PLAN STRUCTURE

Mission
Vision
Values
Executive Progress Report

Background Information
- Statutory authority
- Customers
- Partners
- Products & services
- Resources:
  - Financial summary
  - Human resource summary
  - *Information technology summary*
  - Capital investments summary

Goals

Appendices
A. *Information technology*
B. Additional statutory authority information (optional)
C. Organizational structure (optional)

Information Technology Summary
DPB Database
- "How will your IT investments help you move your business organization from where it is today to where it needs to be tomorrow?"

Information Technology – Appendix A
ProSight
- "Proposed IT investments – A list"

Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

Information Technology Summary: IT Summary Section

The IT Summary Section is a <u>collaboration effort between the business and IT divisions within the agency</u>. It cannot be written without input and involvement from both parties.

The resources that are responsible for the agency's business plan must work with the resources responsible for recording IT investments in PROSIGHT to write this section.

- **Current State**
  Where you are today from a business perspective…

- **Factors Impacting Information Technology**
  External factors that have to be addressed ….. Mandates, requirements, increased demands from customer base ….

- **Anticipated Changes/Desired State**
  Where you want to be from a business perspective….

- **Agency IT Investments**
  How will your agency's proposed IT investments move your agency from its current state to its desired future state?

  How do these investments support the Commonwealth's IT Strategic Plan?

  How do these investments, particularly the IT projects, support the Commonwealth's overall long term goals and objectives?

Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

Information Technology Summary: Plan Goals Alignment with Virginia's Long Term Objectives

Virginia's Long Term Objectives Commonwealth Strategic Plan for Information Technology Goals	1 Best-managed state	2 National leader in our economy	3 Elevate the levels of educational preparedness	4 Healthy lives and strong families	5 Protect and conserve our natural, historical and cultural resources
1 Increase accessibility to government	Contributing	Contributing	Contributing	Contributing	Contributing
2 Facilitate IT collaboration and partnerships		**Primary**		Contributing	Contributing
3 Ensure a trusted and reliable technical environment		Contributing		Contributing	Contributing
4 Create a reputation of performance for technology	**Primary**				
5 Increase workforce productivity through the use of technology			**Primary**	Contributing	

Virginia government trends were aligned to the long term objectives throughout the planning process, ensuring the final plan supports Virginia's objectives.
- Primary: Directly supports the goal or objective
- Contributing: Indirectly supports the goal or objective

Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

Information Technology Summary: Plan Goals Alignment with Virginia's Long Term Objectives
– Example –

Virginia's Long Term Objectives / Agency Investments		1 Best-managed state	2 National leader in our economy	3 Elevate the levels of educational preparedness	4 Healthy lives and strong families	5 Protect and conserve our natural, historical and cultural resources
1	Investment 1	Contributing			Contributing	
2	Investment 2	Contributing	**Primary**			
3	Investment 3			Contributing	Contributing	
4	Investment 4	**Primary**				
5	Investment 5			**Primary**		Contributing

Align each investment to the appropriate long term objectives in the planning process, ensuring the final plan supports Virginia's long term objectives. This is done in ProSight with a detailed explanation in the IT Summary Section.

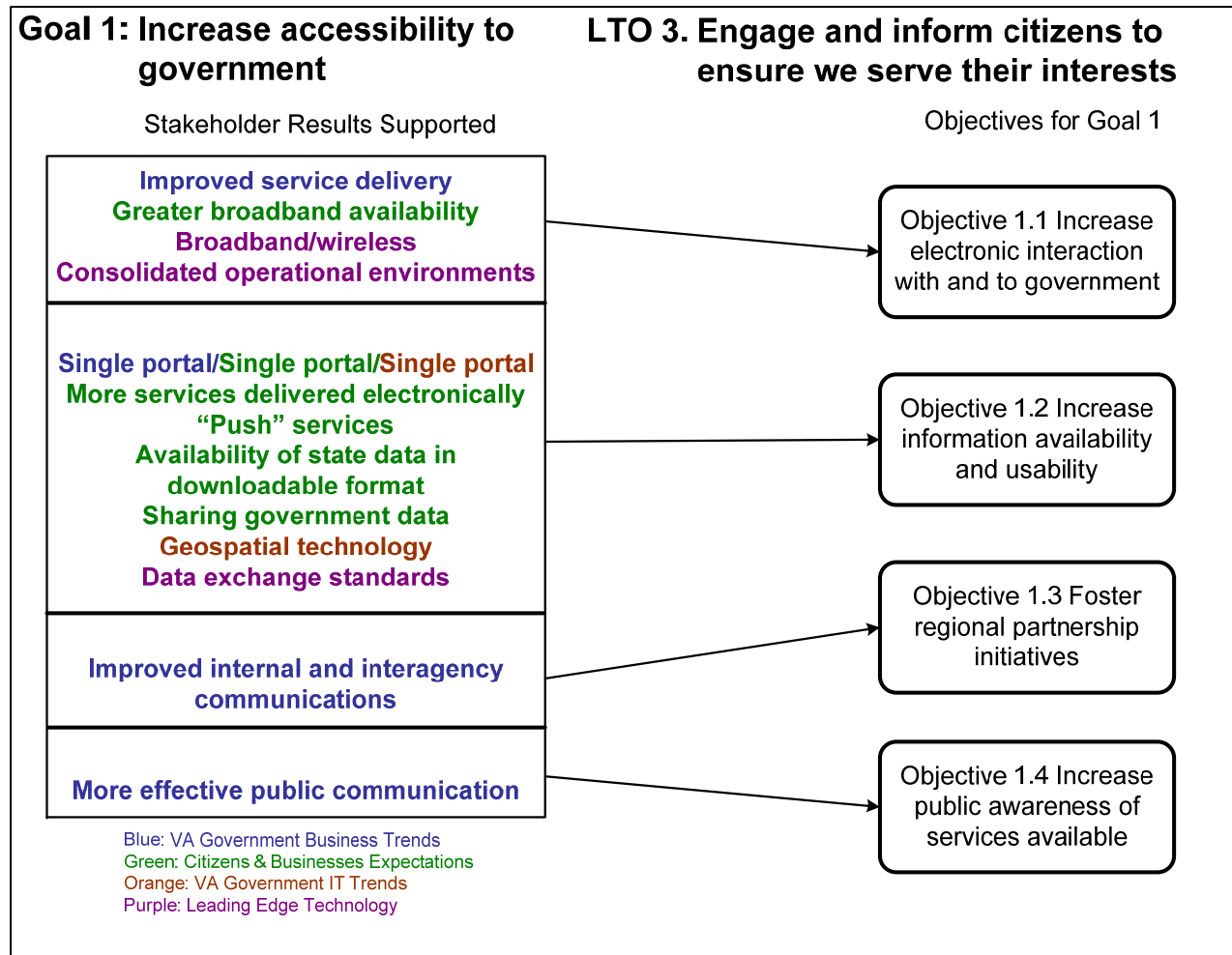# Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

Information Technology Summary: Plan Goals Alignment with Virginia's Long Term Objectives – Example –

Commonwealth Strategic Plan for Information Technology Goals Agency Investments	1 Increase accessibility to government	2 Facilitate IT collaboration and partnerships	3 Ensure a trusted and reliable technical environment	4 Create a reputation of performance for technology	5 Increase workforce productivity through the use of technology
1 Investment 1	Contributing	Contributing	**Primary**		Contributing
2 Investment 2		**Primary**	Contributing		Contributing
3 Investment 3		**Primary**	Contributing		Contributing
4 Investment 4			**Primary**		
5 Investment 5				**Primary**	Contributing

Align each investment to the technology goals during the planning process, ensuring the final plan supports the Commonwealth Strategic Plan for Information Technology. This is done in ProSight with a detailed explanation in the IT Summary Section.

Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

Information Technology Summary: Stakeholder Results Supported

Goal 1: Increase accessibility to government

LTO 3. Engage and inform citizens to ensure we serve their interests

Stakeholder Results Supported

Objectives for Goal 1

Improved service delivery
Greater broadband availability
Broadband/wireless
Consolidated operational environments

Objective 1.1 Increase electronic interaction with and to government

Single portal/Single portal/Single portal
More services delivered electronically
"Push" services
Availability of state data in downloadable format
Sharing government data
Geospatial technology
Data exchange standards

Objective 1.2 Increase information availability and usability

Improved internal and interagency communications

Objective 1.3 Foster regional partnership initiatives

More effective public communication

Objective 1.4 Increase public awareness of services available

Blue: VA Government Business Trends
Green: Citizens & Businesses Expectations
Orange: VA Government IT Trends
Purple: Leading Edge Technology

Enterprise-level business and technology themes captured through stakeholder workshops and input have been aligned to the supporting plan objectives.

Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

Information Technology Summary: Documenting IT Costs – Agency IT Current Services

Category	Cost - Year One		Cost - Year Two		•Total Cost
	General Fund	Nongeneral Fund	General Fund	Nongeneral Fund	
VITA Service Fees (Infrastructure Costs)					
Specialized Infrastructure Costs (out of scope to VITA)					
Application Costs (out of scope to VITA)					
Agency IT Current Services					

When calculating figures for the upcoming budget biennium use the following business rules:
- Year One = DPB base budget for IT given to the agency
- Year Two = Year One fiscal year budget + proposed changes to agency IT current services for Year One

Ref: Strategic and Service Area Plan Instructions 6/5/2007, Appendix I

Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

Information Technology Summary: Documenting IT Costs – Proposed IT Investments

Category	Cost - Year One		Cost - Year Two		•Total Cost
	General Fund	Nongeneral Fund	General Fund	Nongeneral Fund	
Major IT Projects					
Non-Major IT Projects					
Major IT Procurements					
Non-Major IT Procurements					
Totals					

These cost figures are a rollup by category of the cost figures for each investment found in Appendix A.

17

Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

Information Technology Summary: Documenting IT Costs – Projected Total IT Budget

Category	Cost - Year One		Cost - Year Two		•Total Cost
	General Fund	**Nongeneral Fund**	**General Fund**	**Nongeneral Fund**	
Agency Base Budget					
Proposed Changes to Agency IT Current Services					
Agency Projected Total IT Budget					

The table above is built by carrying forward the cost figures from the prior tables.

Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

Appendix A: Projects, Major and Non-Major

PROJECT NAME: Integrated Systems Redesign					
DESCRIPTION: Redesign DMV core mainframe systems and related applications.					
Is this a proposed project or the continuation of an active project? (Proposed or Continuing)?					Proposed
Appropriation Act/Funding Status					
Planned project start date:		7/1/2006	Planned project end date:		6/30/2009
Estimated Costs:		**Total**	**General Fund**	**Nongeneral Fund**	**Nongeneral Fund Type**
Project Cost (estimate at completion):		$32,600,000.00	$0.00	$32,600,000.00	
Estimated project expenditures first year of biennium:		$4,800,000.00	$0.00	$4,800,000.00	Non-general - State
Estimated project expenditures second year of biennium:		$16,000,000.00	$0.00	$16,000,000.00	Non-general - State
Funding Required:		**Total**	**General Fund**	**Nongeneral Fund**	**Nongeneral Fund Type**
Funding required for first year of biennium:		$0.00	$0.00	$0.00	Non-general - State
Funding required for second year of biennium:		$0.00	$0.00	$0.00	Non-general - State
Service Area:		Weight:			
154 DMV 69902 Information Technology Services		Primary			
154 DMV 60101 Vehicle Regulation Services		Secondary			
154 DMV 60103 Driver Regulation Services		Secondary			
154 DMV 60105 Motor Carrier Regulation Services		Secondary			
154 DMV 69901 General Management and Direction		Secondary			
Project Related Procurements					
Contractor Services for BPR					
Procurement Description:		Through a Statement of Work using an existing Advanced IT Services Contract, DMV is seeking a business process re-engineering contractor who will provide support to the DMV Systems Redesign project during Phases 1, 2, and 3.			
Planned Delivery Date:	9/5/2006	Procurement Cost:	$4,750,000.00		

In ProSight:
- Link each investment to a service area served by the investment.
- Flag the service area that is primary.
- Explain how this investment supports the relevant service area in the IT Summary Section.

19

Ref: Agency Planning Handbook, Page 35

Appendix A: Procurements, Major and Non-Major

Stand Alone Major Procurements

Procurement Name:	Upgrade PBX procurement		
Procurement Description:	Up grade the PBX to new technologies supported by the manufacturer.		
Project Planned Start Date	8/7/2007	Project Planned Completion Date	8/7/2007
Procurement cost (estimate at completion):	$3,200,000.00	Appropriation Act Status	
Service Area:		Weight:	
214 LU 10000 Educational and General Programs		Primary	

Again, in ProSight:
- Link each investment to a service area served by the investment.
- Flag the service area that is primary.
- Explain how this investment supports the relevant service area in the IT Summary Section.

Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

Appendix A: Funding Updates

- When the Appropriation Act has been passed by the General Assembly, agencies are required to update the status of their current projects and procurements to indicate whether or not each has been funded. To accomplish this without creating additional amendments, the AITR should update this information in ProSight.

- A list of the current projects and procurements for the agency will be presented. All items have been set to a default status of "Not Funded." This status can be updated to the following values:
    - Fully Funded GF 100% – Fully funded from general fund dollars.
    - Fully Funded NGF 100% – Fully funded from nongeneral funds.
    - Fully Funded GF/NGF 100% – Fully funded from a mixture of general fund dollars and nongeneral funds.
    - Partially Funded GF – Partially funded from general fund dollars.
    - Partially Funded NGF – Partially funded from nongeneral funds.
    - Partially Funded GF/NGF – Partially funded from a mixture of general fund dollars and nongeneral funds.

Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

Appendix A: Certification

- On September 28, all agency heads are required to certify that the data entered for major IT projects is correct.

- On October 12, all agency heads are required to certify the data entered for the Agency IT Strategic Planning component.

- Certification includes both Appendix A and the IT Summary Section

Contact Information

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Commonwealth Preparedness

Per Executive Order 44 (2007)

There will be a standard goal for all agencies in the agency strategic plan:	We will strengthen the culture of preparedness across state agencies, their employees and customers.
The following text should be used for the Goal Summary & Alignment portion of the agency strategic plan:	This goal ensures compliance with federal and state regulations, polices and procedures for Commonwealth preparedness, as well as guidelines promulgated by the Assistant to the Governor for Commonwealth Preparedness, in collaboration with the Governor's Cabinet, the Commonwealth Preparedness Working Group, the Department of Planning and Budget and the Council on Virginia's Future. The goal supports achievement of the Commonwealth's statewide goal of protecting the public's safety and security, ensuring a fair and effective system of justice and providing a prepared response to emergencies and disasters of all kinds.
There will be a standard objective that supports the above goal for all agencies in the agency strategic plan:	We will be prepared to act in the interest of the citizens of the Commonwealth and its infrastructure during emergency situations by actively planning and training both as an agency and as individuals.
There will be one standard measure associated with this objective for all agencies:	Agency Continuity of Operations Plan (COOP) Assessment Score • Measure type: Outcome • Measure frequency: Annual • Baseline: 2007 COOP Assessment Results (% out of 100) • Target: Minimum of 75% or, if at 75%, increase the average by 5% each year • Data source and calculation: The COOP Assessment Review is a 24 component assessment tool that helps measure the viability of a COOP plan.
There will be one standard strategy for all agencies:	The agency Emergency Coordination Officer will stay in continuous communication with the Office of Commonwealth Preparedness and the Virginia Department of Emergency Management.
The following is a guideline for each agency to develop its own/unique strategy:	The agency will determine preparedness enhancements needed at the agency level from federal and state guidance and from comparison of current capability and then distribute funding to meet target increases.

Curtis Brown, OCP

Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

Impact of Aging Population on Agencies

- A requirement was enacted in 2006 that each agency shall include in its strategic plan "*(a)n analysis of the impact that the aging of the population will have on its ability to deliver services and a description of how the agency is responding to these changes."* (VA Code § 2.2-5510.A.4)

- It was amended in 2007, i.e., "*Each agency shall report by November 15 of each year to the Department for the Aging its progress in addressing the impact of the aging of the population, according to guidance established by the Secretary of Health and Human Resources. Based upon information received, the Department for the Aging shall prepare a report summarizing the progress made by the agencies and submit such report to the Governor and the General Assembly by June 30 of the following year.*"

- The Virginia Department of Aging (VDA) will send instructions for completing the analysis to agencies by mid-September.

- Completed reports are to be sent from agencies to VDA.

- The analysis should be included in the Executive Progress Report - Customer Trends & Coverage section of the agency strategic plan.

Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

Agency Administration

There will be a standard objective for all agencies:	To ensure that resources are used efficiently and programs are managed effectively, and in a manner consistent with applicable state and federal requirements.
There will be a standard measure associated with this objective for all agencies:	Percent of scorecard categories marked as "meets expectations" for the agency • Measure type: Outcome • Measure frequency: Quarterly • Baseline: The 2007 score of the agency • Target: To be developed by each agency • Data source and calculation: The Management Scorecard grades agencies on six criteria. Take the number of cases where your agency scored "Meets Expectations" and divide by six. For example, if your agency "Meets Expectation" in four cases, and "Needs Improvement" in two, divide four by six, to receive a score of 67.7%. This number will serve as your agency's baseline as we head into the new biennium.
Notes:	The Virginia Performs Management Scorecard program has served as a common gauge of agency operations over the past several years. To help punctuate these accomplishments, the Governor's Office would like to include the results of your performance in your strategic and service area plans. This addition should be made to the Administrative and Support Service Area of your service area plan. If your agency does not have an Administrative and Support Service Area, then choose the most logical service area where an administrative type of objective would fit. If your agency does not have any service area appropriate for this objective, include it in your agency's strategic plan. You may find your agency's most recent scores at: http://vaperforms.virginia.gov/agencylevel/src/scorecardresults.cfm

Part 1: Strategic and Service Area Plan Components – *What Has Changed?*

Key Objectives and Key Measures

- Key *objectives* are the desired outcomes for an agency's major programs or activities, that reflect the agency's primary mission.

- Key *measures* are indicators of how well an agency program is performing with respect to the key objectives.

- If a measure is designated as "key," the objective to which it aligns is automatically designated as "key."

- Key objectives and measures are approved and monitored by the Governor's Office and reviewed as part of the budget decision-making process.

- If you wish to make a change (e.g., add, delete, revise) a key objective or key measure, DPB will facilitate obtaining approval through the Governor's Office. Please notify your DPB analyst of any changes in advance of requesting approval.

- Standard phrasing will be required for key objectives and key measure summaries.

More details later…

Completion of a S.W.O.T. Analysis

- S.W.O.T stands for Strengths, Weaknesses, Opportunities, and Threats.

- A S.W.O.T. analysis must be completed by each agency.

- Aim: To identify and focus on your agency's most valuable assets, areas for improvement and external issues that should be taken into account as long-term plans are created.

- The S.W.O.T. analysis can be done for the agency as a whole or for each objective.

- The S.W.O.T. analysis is not required to be physically submitted with your strategic plan, but must be retained on-site at each agency for the life of the agency's strategic plan. *(Ref: Strategic and Service Area Plan Instructions 6/5/2007, Page 2)*

- The Department of Planning and Budget and the Department of Accounts may request to see an agency's S.W.O.T. analysis at any given time.

Ron Necessary or Joe Kapelewski, DOA

Part 2: Improving Strategic and Service Area Plans – *S.W.O.T. Analysis Overview*

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS

A S.W.O.T. analysis…

- is a tool that can be used to identify assets an organization may have at its disposal to address issues and risks that may impede progress toward stated objectives.

- makes management aware of the identified factors and ensures they are considered in the decision making processes.

Internal Perspective

STRENGTHS - *Attributes of the agency that are helpful to achieving the desired objective.*

WEAKNESSES - *Attributes of the agency that are harmful or hinder achieving the desired objective.*

External Perspective

OPPORTUNITIES - *External conditions that are helpful to achieving the desired objective.*

THREATS - *External conditions that are harmful or hinder achieving the desired objective.*

Ref: Strategic and Service Area Plan Instructions 6/5/2007, Appendix I

Part 2: Improving Strategic and Service Area Plans – *S.W.O.T. Analysis Overview*

Strengths

Attributes of the agency that are helpful to achieving the desired objective.

- What does your agency do better than most others?
- What do others perceive as your strengths?
- What are the things you know you are good at?

Weaknesses

Attributes of the agency that are harmful or hinder achieving the desired objective.

- What can be improved?
- What do others perceive as your weaknesses?

Examples:
- Employee expertise
- Agency culture
- Experienced employees
- Operational efficiency
- Access to resources
- Agency reputation

Examples:
- Employee demographics (e.g., high percentage of employees are of retirement age)
- Items mentioned under strengths but of a negative nature
- Lack of cross-training leading to key person dependencies
- Outdated computer system

29

Ref: Strategic and Service Area Plan Instructions 6/5/2007, Appendix I

Part 2: Improving Strategic and Service Area Plans – *S.W.O.T. Analysis Overview*

Opportunities
External conditions that are helpful to achieving the desired objective.

> ↜ What trends are occurring that you can take advantage of?
>
> ↜ What external activities are taking place that you can take advantage of?
>
> ↜ What opportunities exist in the following areas?*
> - Customers
> - Industry (e.g, education, health care)
> - Society
> - Technology
> - Economy
> - Environment
> - Politics
>
> *Source: James L. Morrison, UNC

Examples
↜ New technologies

↜ Changes in statewide policies

↜ Demographic changes among your customers or potential customers

↜ One time events

↜ Collaborative efforts with outside entities

Part 2: Improving Strategic and Service Area Plans – *S.W.O.T. Analysis Overview*

Threats

External conditions that are harmful or hinder achieving the mission or goals

↬ What threats exist that could exploit the agency's weaknesses and have a serious impact on agency operations?

↬ What obstacles does your agency face with respect to the following?*
  - Customers
  - Industry (e.g, education, health care)
  - Society
  - Technology
  - Economy
  - Environment
  - Politics

*Source: James L. Morrison, UNC

Examples
↬ Access to resources
↬ New legislation

S.W.O.T. Tips

- ↳ Start by defining a desired end state or objective.

- ↳ Include input from all members of your management team from different disciplines.

- ↳ Don't confuse opportunities external to the agency with strengths internal to the agency.

- ↳ Be realistic about agency strengths and weaknesses.

- ↳ Make sure the S.W.O.T. describes "conditions." Don't confuse the conditions with potential strategies.

- ↳ Clarify how your existing investments either advance or fail to fully address your ability to accomplish the objectives.

- ↳ Surface opportunities that might allow you to redeploy existing assets or use fewer assets to accomplish the objectives.

- ↳ Be specific.

- ↳ Avoid complexity and excess analysis.

- ↳ Keep it short and simple.

S.W.O.T. Methods

Ref: Strategic and Service Area Plan Instructions 6/5/2007, Appendix I

Part 2: Improving Strategic and Service Area Plans – *S.W.O.T. Analysis Matrix*

	Strengths (Internal) 1. 2. 3.	Weaknesses (Internal) 1. 2. 3.
Opportunities (External) 1. 2. 3.	*Leverage strengths to exploit new opportunities.*	*Eliminate weaknesses that are barriers to taking advantage of opportunities.*
Threats (External) 1. 2. 3.	*Use strengths to defend against threats.*	*Address weaknesses that could be exploited by threats.*

A Mission Statement is:

✤ A statement of purpose

✤ The fundamental reason for an organization's existence

✤ Something that describes what you do on a daily basis

✤ A statement that describes what you do for your customers

Department of Planning & Budget Mission Statement

We advise the Governor on how to wisely use public resources. We analyze, develop, and carry out fiscal, programmatic, and regulatory policies that benefit Virginians.

Department of Taxation Mission Statement

The Virginia Department of Taxation's mission is to serve the public by administering the tax laws of the Commonwealth of Virginia with integrity, efficiency, and consistency.

34

Examples of Poorly Written Mission Statements

1. Become a $125 billion company by the year 2010.

2. To be the premier provider in our industry.

3. As ambitious employees of our budding corporation, we as a whole shall aim to affordably manufacture the highest quality products that will exponentially increase mankind's eternal quest for a higher worldwide standard of living.*

4. We produce new and dynamically innovative products from new ideas, using new approaches, in the most cost-effective manner, with strong financial support from various industry leaders.*

Source: http://www.tcnj.edu/~rgraham/rhetoric/mission-statements.html

Notes: Reasons Why These Examples Are Not Good

_____

_____

_____

_____

_____

Better Examples

Do you recognize these mission statements?
1. Explore strange new worlds, seek out new life and new civilizations and boldly go where no man has gone before
2. To organize the world's information and make it universally accessible and useful

Examples from Virginia State Government:
1. Department of Social Services: People helping people triumph over poverty, abuse and neglect, to shape strong futures for themselves, their families and communities

2. The Virginia Department for the Aging (VDA) works with 25 local Area Agencies on Aging (AAAs) as well as various other public and private organizations to help older Virginians and their families find the services and information they need.

3. Virginia Department of Transportation (VDOT) is responsible for building, maintaining and operating the state's roads, bridges and tunnels.

Exercise: Characteristics of Good Mission Statements

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Exercise

Within your groups, review each other's mission statements and, where appropriate, offer suggestions for improvement.

Report what you found and your suggested improvements.

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Part 2: Improving Strategic and Service Area Plans – *Today's Examples*

The "Everyman" Mission Statement:
"To stay healthy and build a secure financial future."

Dept. of Environmental Quality (DEQ) Mission Statement:
The mission of the Department of Environmental Quality is to protect and improve the environment and the well being of all Virginians.

An Objective is:

A description of the results that, when achieved, move an organization toward its stated goals.

 ✣ There can be any number of objectives associated with a goal.

 ✣ Service area objectives are objectives the service area will undertake in support of mandates or/and the organization's mission.

Characteristics

 ✣ Describes the results needed to accomplish a higher level goal.

 ✣ An objective developed for a service area plan must align to a goal in the agency's strategic plan.

 ✣ Objectives should be included in an agency's <u>strategic plan</u> if the objective cuts across multiple service areas.

 ✣ Should start with an action verb phrase or have an action verb phrase that follows an introductory phrase.

 ✣ Should be easily understood by citizens.

 ✣ Should be measurable.

 ✣ **Key objectives** must begin with "We will" and be followed by an action verb phrase.

If the service area objective is a key objective, you will need to go through your Secretary to obtain the Governor's Office approval to delete or modify the objective. (Ref: Strategic and Service Area Plan Instructions 6/5/2007, Page 9)

Ref: Agency Planning Handbook, Page 29

Objective Example:

Goal: Provide state-of-the-art financial management for the
Commonwealth to protect its fiscal integrity.
↓

Objective: Develop a financially balanced and structurally sound
budget for Virginia.

Examples of Poorly Written Objectives

Provide financial assistance.
Complete hardware upgrades in the Roanoke office.

Part 2: Improving Strategic and Service Area Plans – *Today's Examples*

The "Everyman" Mission Statement:
"To stay healthy and build a secure financial future."
↓

The "Everyman" Goal:
"Maintain good physical health."
↓

The "Everyman" Objective:
"Ensure stable and healthy blood pressure levels."

Dept. of Environmental Quality (DEQ) Mission Statement:
The mission of the Department of Environmental Quality is to protect and improve the environment and the well being of all Virginians.
↓

DEQ Goal:
Program Capability: Achieve focused,more efficient programs to meet or exceed environmental standards.
↓

VA Water Quality Fund Service Area Objective:
Improve and protect water quality, especially in the Chesapeake Bay and its tidal rivers.

Exercise

Within your groups, review a few objectives and, where appropriate, offer suggestions for improvement.

Report what you found and your suggested improvements.

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Exercise: Tips for Determining Which Objectives are "Key" Objectives

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What is a measure?

A measure is a management tool - an indicator used to determine the effect that strategies, initiatives and activities are having in accomplishing desired results.

It is a tool to assist in the decision making process.

"If the service area measure is a key measure, you will need to go through your Secretary to obtain the Governor's Office approval to delete or modify the measure."

(Ref: Strategic and Service Area Plan Instructions 6/5/2007, Page 9)

44

A measure is made up of a number of elements.

The <u>Measure</u> Itself

    ✎ *What is to be measured*

The Measurement <u>Type</u>

    ✎ *Input, Output, Outcome*

The Measurement <u>Frequency</u>

    ✎ *How often the measure is reviewed*

The Measurement <u>Data Source & Calculation</u>

    ✎ *Source of the data and any calculation performed*

The Measurement <u>Baseline</u>

    ✎ *The point from which measurement will be taken and progress assessed; for new measures*

The Measurement <u>Target</u>

    ✎ *The level of performance you are striving to achieve*

The Measure Itself

A valid indicator for the objective that helps you ensure you are moving toward the desired result

Examples:
- ↳ Violent crime rate
- ↳ Average citizen satisfaction rating
- ↳ Employee turnover rate

Exercise: Are these measures?

1. Between FY 2006 and FY2011, approximately 219,000 claims are expected to be submitted under the FHA loss mitigation program.

2. Publish regulations for FHA mortgage insurance programs that increase lender compliance and accountability.

3. Enforcement of RESPA and the Interstate Land Sales Act will reduce unnecessary housing costs.

4. FHA increases the percentage of at-risk loans that substantively comply with FHA program requirements.

Tips for Developing Measures

↬ To develop a measure, ask the following question: *What data will I monitor to determine whether I'm making progress toward achievement of this objective?* Your answer will likely begin with a phrase similar to these: *the number of, the percentage of, the rate of, the degree to which.*

↬ Consistent formatting across agencies reduces confusion.
  - Keep the wording of the measure neutral. Avoid writing measures that start with a verb phrase (e.g., to improve, reduce). It makes them sound like goals, objectives or targets and may cause confusion.

  - Separate the measure from the target, as designated in the structure of the plan.

↬ Don't confuse the measures with strategies, which tell you what you will be doing to achieve an objective. Strategies are things like programs, initiatives, studies and projects. The effects of the strategies will be reflected in the measures.

↬ When designing and reporting measures, try to avoid "cumulative" data.

↬ Ensure the measure is written so that it is easily understood by citizens.

↬ Key measures are <u>summaries</u> of the measures themselves and the targets, so they will be written in a specific way.

Part 2: Improving Strategic and Service Area Plans – *Today's Examples*

The "Everyman" Mission Statement:
"To stay healthy and build a secure financial future."
↓
The "Everyman" Goal:
"Maintain good physical health."
↓
The "Everyman" Objective:
"Ensure stable and healthy blood pressure levels."
↓
The "Everyman" Measure:
"Blood Pressure"

Dept. of Environmental Quality (DEQ) Mission Statement:
The mission of the Department of Environmental Quality is to protect and improve the environment and the well being of all Virginians.
↓
DEQ Goal:
Program Capability: Achieve focused,more efficient programs to meet or exceed environmental standards.
↓
VA Water Quality Fund Service Area Objective:
Improve and protect water quality, especially in the Chesapeake Bay and its tidal rivers.
↓
The Measure:
Number of pounds of phosphorus nutrients discharged from significant point sources in the Chesapeake Bay watershed

Measurement Exercise

Working in your groups, review your measures to see what changes could be made to improve the measures.

Part #1:

1. Determine if the measures are truly measures. If not, rewrite them to turn them into measures.

2. Determine if any measures should be replaced, deleted or added.

3. Make other revisions to the measures to make them more understandable.

4. Provide one example on a flipchart to review with the entire group.

Part 2: Improving Strategic and Service Area Plans – *Anatomy of a Measure*

There are three types of measures: Input, Output and Outcome

Input Measure

Definition:
- A measure that describes the amount of resources used to conduct an activity, produce an output or provide a service
- A measure that describes the volume of incoming work to be processed;
- Usually consists of a single numeric value (e.g., $2,000 spent on conference fees)
- A type of workload measure

Examples:
- *Number of hours used to analyze a new software package*
- *Amount of money invested*
- *Number of incoming phone calls to the I.T. help desk*

Output Measure

Definition:
- A measure that describes the amount of work completed or output produced
- Usually consists of a single numeric value (e.g., 47 people trained)
- A type of workload measure

Examples:
- *Number of service calls closed*
- *Number of customer calls completed*
- *Number of system updates completed*
- *Number of care packages delivered*

Outcome Measure

Definition:
- A measure that describes the results achieved by an activity compared to the activity's intended purpose
- The extent to which a service or activity has impacted its intended audience

Examples:
- *Problem resolution rate*
- *Customer satisfaction rate*
- *Employee retention*

★ The Governor has asked that agencies use, to the extent possible, **outcome** measures for their objectives.

Ref: Strategic and Service Area Plan Instructions 6/5/2007, Page 9)

50

Part 2: Improving Strategic and Service Area Plans – *Today's Examples*

The "Everyman" Mission Statement:
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The "Everyman" Objective:
"Ensure stable and healthy blood pressure levels."
↓

The "Everyman" Measure:
"Blood Pressure"
↓

The "Everyman" Measurement Type:
"Outcome"

Dept. of Environmental Quality (DEQ) Mission Statement:
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Program Capability: Achieve focused,more efficient programs to meet or exceed environmental standards.
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VA Water Quality Fund Service Area Objective:
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↓

The Measure:
Number of pounds of phosphorus nutrients discharged from significant point sources in the Chesapeake Bay watershed
↓

The Measurement Type:
Outcome

Measurement Frequency

✺ *Measurement frequency is the cycle at which the measure will be reviewed and monitored.*

Typical Frequencies

✺ *Monthly, quarterly, every six months, annually and bi-annually*

✺ *There is also an "Other" option. If selected, you must document what the frequency will be.*

✺ *"Key" measures should be reported quarterly, if possible.*

For a measure to be a useful management and decision-making tool, it must be monitored regularly and reviewed frequently enough to enable people to take any necessary corrective action in a timely manner.

Part 2: Improving Strategic and Service Area Plans – *Today's Examples*

The "Everyman" Mission Statement:
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↓
The "Everyman" Objective:
"Ensure stable and healthy blood pressure levels."
↓
The "Everyman" Measure:
"Blood Pressure"
↓
The "Everyman" Measurement Type:
"Outcome"
↓
The "Everyman" Measurement Frequency:
"Every 6 months"

Dept. of Environmental Quality (DEQ) Mission Statement:
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Program Capability: Achieve focused,more efficient programs to meet or exceed environmental standards.
↓
VA Water Quality Fund Service Area Objective:
Improve and protect water quality, especially in the Chesapeake Bay and its tidal rivers.
↓
The Measure:
Number of pounds of phosphorus nutrients discharged from significant point sources in the Chesapeake Bay watershed
↓
The Measurement Type:
Outcome
↓
The Measurement Frequency:
Annual

Measurement Data Source & Calculation

↳ Identify the source of the measurement data that will be used and give a description of how any calculations for the measure will work.

Example of a data source: Survey of customers as they complete their interaction with the local departments (Note: You may wish to provide the name of the survey).

Example of the calculation: Calculate an average customer satisfaction rating for each survey question for all completed surveys received in a locality in a given calendar month. Aggregate the data for all localities in a region to provide an organization-wide score.

54

Part 2: Improving Strategic and Service Area Plans – *Today's Examples*

The "Everyman" Mission Statement:
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The "Everyman" Objective:
"Ensure stable and healthy blood pressure levels."
↓
The "Everyman" Measure:
"Blood Pressure"
↓
The "Everyman" Measurement Type:
"Outcome"
↓
The "Everyman" Measurement Frequency:
"Every 6 months"
↓
Data Source & Calculation:
"Data will be supplied by doctor. No calculation."

Dept. of Environmental Quality (DEQ) Mission Statement:
The mission of the Department of Environmental Quality is to protect and improve the environment and the well being of all Virginians.
↓
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↓
VA Water Quality Fund Service Area Objective:
Improve and protect water quality, especially in the Chesapeake Bay and its tidal rivers.
↓
The Measure:
Number of pounds of phosphorus nutrients discharged from significant point sources in the Chesapeake Bay watershed
↓
The Measurement Type:
Outcome
↓
The Measurement Frequency:
Annual
↓
Data Source & Calculation:
Pounds of nutrients discharged each year is obtained from permit data available in CEDS, annual WQIF reports, CBP Watershed Model, and other sources.

Measurement Baseline

✥ A baseline is the starting point from which an organization monitors progress. It may be the current state or an earlier point in time, from which you have been monitoring progress.

✥ Each *new* measure established will ultimately need to have an associated baseline*.*

✥ The baseline should include, if available, the most recent performance data and the date.

Example: Average customer satisfaction rating of 4.5 (on a scale of 1-5) as of 12/31/06

56

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The "Everyman" Objective:
"Ensure stable and healthy blood pressure levels."
↓

The "Everyman" Measure:
"Blood Pressure"
↓

The "Everyman" Measurement Type:
"Outcome"
↓

The "Everyman" Measurement Frequency:
"Every 6 months"
↓

Data Source & Calculation:
"Data will be supplied by doctor. No calculation."
↓

The "Everyman" Measurement Baseline:
"140/100 as of 3/31/07 "

Dept. of Environmental Quality (DEQ) Mission Statement:
The mission of the Department of Environmental Quality is to protect and improve the environment and the well being of all Virginians.
↓

DEQ Goal:
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↓

VA Water Quality Fund Service Area Objective:
Improve and protect water quality, especially in the Chesapeake Bay and its tidal rivers.
↓

The Measure:
Number of pounds of phosphorus nutrients discharged from significant point sources in the Chesapeake Bay watershed
↓

The Measurement Type:
Outcome
↓

The Measurement Frequency:
Annual
↓

Data Source & Calculation:
Pounds of nutrients discharged each year is obtained from permit data available in CEDS, annual WQIF reports, CBP Watershed Model, and other sources.
↓

The Measurement Baseline:
25.73 million pounds as of 12/31/2004

Measurement Target

✤ A target is the specific level of performance the organization is striving to achieve. It is a desired level of performance of an objective that can be measured within a specific point in time; usually expressed as a number or percentage.

> *Example:*
> • *3% increase in FY2007 and in FY2008*

✤ If you have long-term targets (ones that exceed the biennium), set interim targets that relate to the second year of the budget biennium to report in your plan.

✤ If your performance consistently exceeds your target, it is time to reassess the target.

✤ Ensure targets are challenging, but realistic and achievable.

✤ Consider where the target places Virginia among other states. Check targets against national data from other states and avoid, where possible, setting targets that fall below other states.

Part 2: Improving Strategic and Service Area Plans – *Today's Examples*

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The "Everyman" Measure:
"Blood Pressure"
↓
The "Everyman" Measurement Type:
"Outcome"
↓
The "Everyman" Measurement Frequency:
"Every 6 months"
↓
Data Source & Calculation:
"Data will be supplied by doctor. No calculation."
↓
The "Everyman" Measurement Baseline:
"140/100 as of 3/31/07 "
↓
The "Everyman" Measurement Target:
"120/70 as of 12/31/07 "

Dept. of Environmental Quality (DEQ) Mission Statement:
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↓
DEQ Goal:
Program Capability: Achieve focused,more efficient programs to meet or exceed environmental standards.
↓
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Improve and protect water quality, especially in the Chesapeake Bay and its tidal rivers.
↓
The Measure:
Number of pounds of phosphorus nutrients discharged from significant point sources in the Chesapeake Bay watershed
↓
The Measurement Type:
Outcome
↓
The Measurement Frequency:
Annual
↓
Data Source & Calculation:
Pounds of nutrients discharged each year is obtained from permit data available in CEDS, annual WQIF reports, CBP Watershed Model, and other sources.
↓
The Measurement Baseline:
25.73 million pounds as of 12/31/2004
↓
The Measurement Target
Maximum of 24.5 million pounds by 12/31/2008

Measurement Exercise

Working in your groups, review your measures to see what changes could be made to improve the measures.

Part #2:

1. For the measures you worked with in part #1, review the entire "anatomy" of each (e.g., frequency, baseline, type of measure, target, data source and calculation, etc.).

2. Make changes, as needed, to improve the measurement elements.

Key Measures

- ***Key measures*** are indicators of how well an agency is performing on the major or most important programs or activities (i.e., the key objectives) that reflect the agency's primary mission.

- If a measure is designated as "key," the objective to which it aligns is automatically designated as "key."

- Standard phrasing will be required for key measures. The required phrasing results in a ***Key Measure Summary***, reported as follows: They start with the phrase "We will…" The sentence that follows the introductory phrase combines the measure with the target to create a summary of desired performance, communicated in a citizen-friendly manner.

- A field has been developed in the strategic planning area of Virginia Performs. If you check the "Governor's Key" box to designate a measure as a "key measure," a new field entitled *Key Measure Summary* will pop up. Record your "We will…" statement for the key measure in that field. The key measure summary statement will appear in the measures information section in your agency's strategic or service area plan with the title "Key Measure Summary." Note: The "Governor's Key" box is only checked if the measure has been approved as key by the Governor's office.

Ref: Agency Planning Handbook, Page 44

Writing a Key Measure Summary

Objective & Measure as Reported in the *Department of Juvenile Justice Service Area Plan*		Conversion to a Key Objective and a Key Measure Summary
Objective: To decrease the number of repeat juvenile offenders in Virginia, specifically those convicted of a new misdemeanor or felony within one year of being placed on probation with DJJ.	→	**Key Objective**: We will decrease the number of repeat juvenile offenders in Virginia, specifically those convicted of a new misdemeanor or felony within one year of being placed on probation with the Department of Juvenile Justice.
Measure: Percentage of juveniles convicted of a new misdemeanor or felony within a year of being placed on probation	→	**Key Measure Summary**: We will reduce the percentage of juveniles convicted of a new misdemeanor or felony within a year of being placed on probation to 20.6% or less by 12/1/2008.
Target Value: 20.6% or less	→	
Target Date: 12/1/2008	→	

Ref: Agency Planning Handbook, Page 44

Measurement Exercise – Part #3

1. Select key measures reported by your agencies.

2. Rewrite them into the "key measure summary" format.

3. Prepare one for presentation to the entire group.

Strategies

ᨆ Strategies are actions that support the accomplishment of the plan and
   deliver the results needed to accomplish objectives.

ᨆ Normally these strategies become action plans and specific tasks within or
   across service areas.

ᨆ While monitoring measures, it is the adjustment of these strategies that will
   influence the direction of the measures.

>   *Examples:*
>   ᨆ   *Develop customer service standards.*
>   ᨆ   *Develop and deliver customer service training.*
>   ᨆ   *Establish a culture that believes good customer service is everyone's job.*

Ref: Agency Planning Handbook, Page 32

Strategy Exercise:

The "Everyman" Objective:
"Ensure stable and healthy blood pressure levels."

↓

The "Everyman" Measurement Target:
"Decrease blood pressure levels to 120/80 by 9/30/07."

What strategies can be employed to achieve our objective and target?

_____

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Part 2: Improving Strategic and Service Area Plans – *Strategy Exercise*

<u>Strategy Exercise:</u>

Assess and discuss strategies for 1-2 objectives in your group.
Recommend ways to improve them, if appropriate.

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Key Objectives & Key Measures

↳ Key <u>objectives</u> reflect the most critical, desired outcomes for your agency's major programs or activities.

↳ The required format for key objectives (We will…) sends a strong message about the outcome upon which your agency intends to focus important resources.

↳ Key <u>measures</u>, written in a standard "*key measure summary"* format, inform others about how you will monitor your success in achieving the key objective and about the specific performance target you intend to achieve.

↳ Key objectives and key measures are monitored by the Governor's Office and reviewed as part of the budget decision-making process.

↳ Therefore, designating an objective or measure as "key" requires thoughtful consideration.

Ref: Agency Planning Handbook, Page 44

Part 2: Improving Strategic and Service Area Plans – *Next Steps*

The due dates for plans is <u>9/28/07</u>.

We recognize how busy all of you are, so we thought we would provide a checklist to help you get organized to update your strategic and service area plans.

1. Determine who should be involved in updating the plans.

2. Identify elements in the plans that <u>do not need revision</u> (e.g., mission, vision, statutory authority, background information).

3. Determine what elements requiring revision need to be worked on by the "whole group" and where you can "divide and conquer."

4. If "dividing and conquering," agree to standard formats for making revisions to reduce editing time. In addition, set deadlines and stick to them to minimize last minute work or late submissions.

5. Figure out how to do the S.W.O.T. analysis. There are several approaches you can use, from brainstorming to reviews of studies done by experts in your agency's field.

6. Use the S.W.O.T. analysis as input for developing goals, objectives and strategies.

7. Spend time clarifying your key objectives and key measures to ensure they accurately reflect the most critical things you want to accomplish over the next biennium. Make sure the key objectives and key measure summaries follow the required "We will…" format.

8. Make your revisions. Make sure all elements of the plans are written so that the public can understand. Avoid jargon.

9. Proofread the final document for errors.

10. Enter the data to VA Performs.

11. Determine how you will communicate the plans to your staff and how you will use the plans to manage your organization. Set a schedule for reviews of measures and strategies.

12. Post the plans on your website.

Part 2: Improving Strategic and Service Area Plans – *Class Summary*

Review & Questions:

Did we cover all of the items you identified at the beginning of the session?

Do you have any additional questions or suggestions about what was covered today?

Session Feedback:

What was good about today's session?

What would you change about today's session?

Planning Resources:

For detailed instructions on how to use the web-based tool and for access to the latest version of the agency planning handbook, go to www.DPB.virginia.gov.

℘

If you have questions, call your DPB analyst.

Thank You

Let's Adjourn!