

AGENCY PLANNING HANDBOOK

An agency resource for implementation of Virginia's performance management system, which encompasses agency strategic plans, program/service area plans, Executive Progress Reports, and performance measures

*Department of Planning and Budget
2014-2016 Biennium
Produced: May 2014*

AGENCY PLANNING HANDBOOK

The Code of Virginia in § 2.2-1501 charges the Department of Planning and Budget with:

11. (Effective until July 1, 2017) Development, coordination and implementation of a performance management system involving strategic planning, performance measurement, evaluation, and performance budgeting within state government. The Department shall ensure that information generated from these processes is useful for managing and improving the efficiency and effectiveness of state government operations, and is available to citizens and public officials.

12. Development, implementation and management of an Internet-based information technology system to ensure that citizens have access to performance information.

The following handbook provides information and guidelines for implementation of Virginia's performance management system, which encompasses agency strategic and program/service area plans, Executive Progress Reports, and performance measures.

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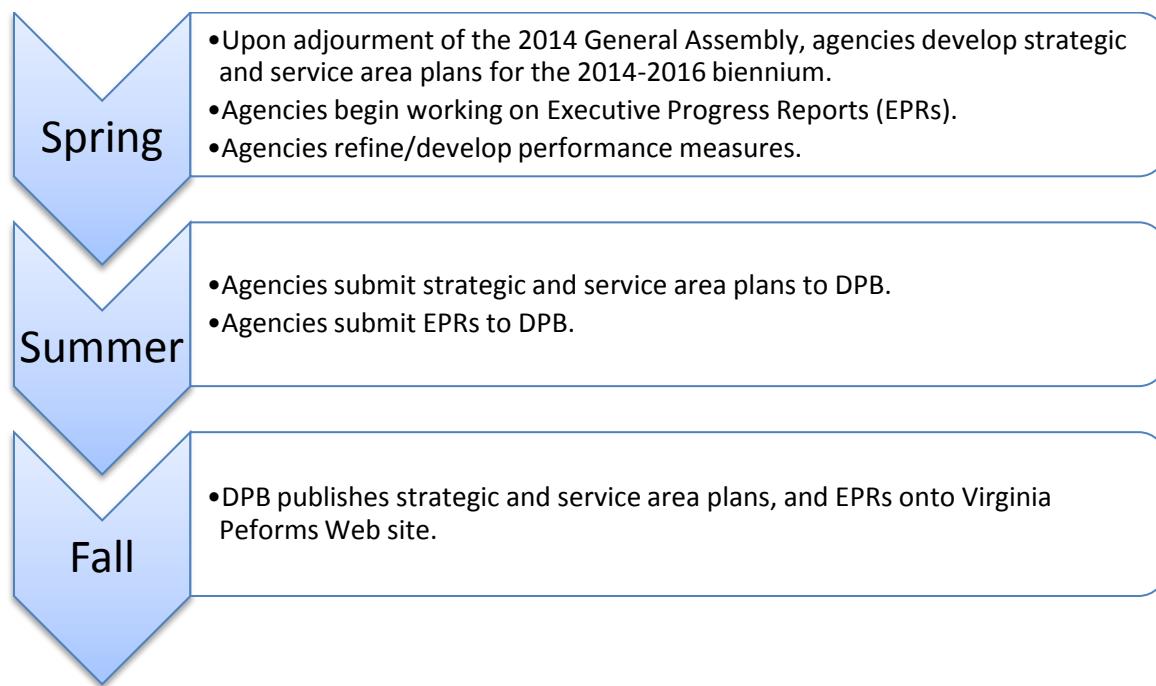
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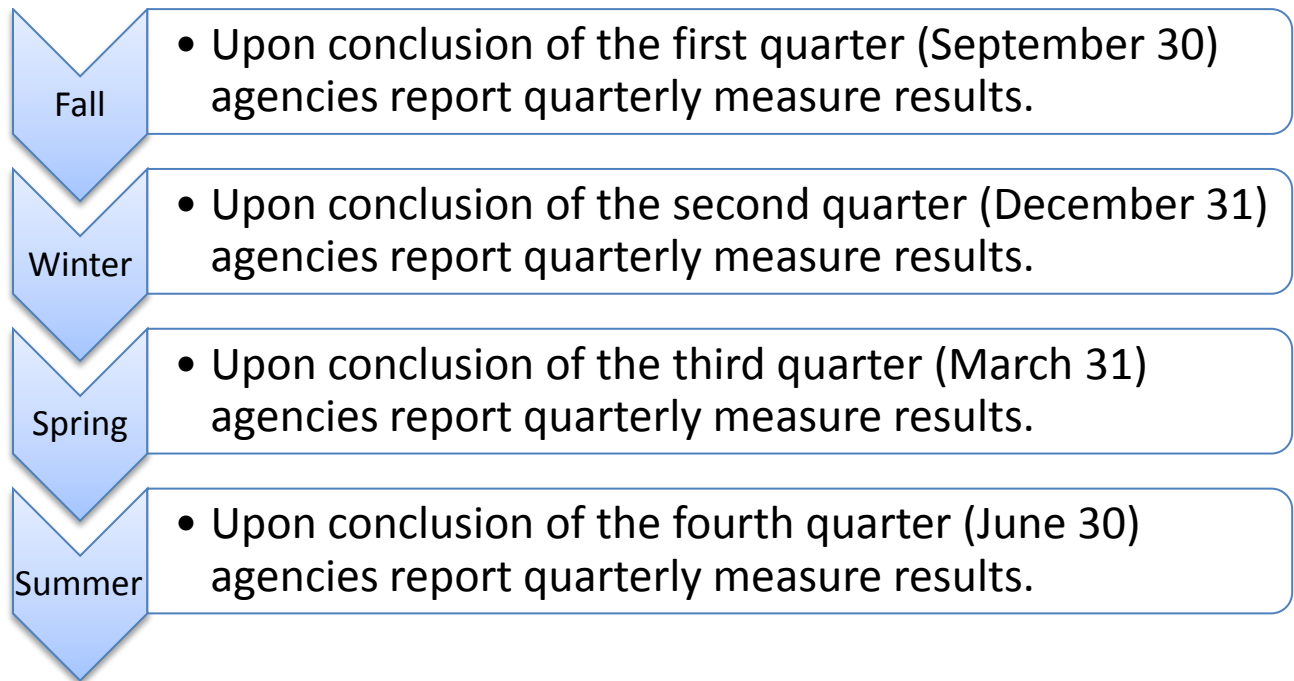
THE PLANNING CYCLE

Beginning with the 2014-2016 biennial budget cycle, the performance management cycle has been modified to better align with adoption and implementation of the biennial budget. The chart below is intended to provide agencies with the estimated planning cycle, actual deadlines will be provided to agencies by The Department of Planning and Budget (DPB).

Development of Strategic Plans, Service Area Plans, Executive Progress Reports and Performance Measures:



Performance Measure Reporting:



HIGHLIGHTS OF IMPROVEMENTS TO PERFORMANCE MANAGEMENT SYSTEM

Overall System Highlights:

- Streamlined the Performance Budgeting (PB) System architecture to allow more system flexibility.
- Log-in and security are maintained in the PB System.
- Agencies have the ability to self publish measure results and program/service area plans. DPB retains the authority to publish changes to measures and Executive Progress Reports. Detailed information regarding the authority structure can be found in the “Roles and Responsibilities” section of this handbook.

Strategic Plan Highlights:

- Financials are populated from the PB System, with the ability for agencies to override numbers to account for anomalies in the data.
- Customers are at the agency level only.
- Ability to attach documents or links.

Service Area Plan Highlights:

- Not every service area in the budget is required to have an individual service area plan. Contact your DPB Budget Analyst for more information.
- Financials are populated from the PB System, with the ability for agencies to override numbers to account for anomalies in the data.
- Ability to attach documents or links.

Performance Measure Highlights:

- Measures are at the agency level ONLY. However, agencies will be able to indicate which service areas are impacted by the measure.
- Not all service areas are required to have a performance measure linked/associated with it.
- All measure attributes are in one place in the system.

ROLES AND RESPONSIBILITIES

The Council on Virginia's Future (CVF) was created to develop long-term, results-based planning for state government through the implementation of a Roadmap for Virginia's Future. That Roadmap establishes a long-term vision for the Commonwealth, long-term objectives for state services, and a planning and performance system to measure and evaluate the state's progress toward its goals. The Council works to help guide Virginia in improving outcomes for citizens. Membership is prescribed by law and includes top leadership from the executive and legislative branches of state government, as well as business and community leaders from across the Commonwealth.

The Department of Planning and Budget (DPB), which comes under the Secretary of Finance (SOF), is charged by the Code of Virginia to implement performance management in Virginia.

The CVF, the SOF, and DPB work together to continually improve upon Virginia's performance management success.

The following authority matrix outlines the responsibilities of DPB, the Cabinet and executive branch agencies in relation to strategic planning, performance measures, and the Executive Progress Report. The CVF traditionally "observes" the progress in each of the aspects of performance management.

Category	Action	Agency	DPB	Cabinet
Strategic Plans	Create new plan for biennium	Action	Observe	Comment and Review
	Update plan for General Assembly changes	Action	Observe	Comment and Review
	Update financials to reflect General Assembly changes	Action	Observe	Comment and Review
Performance Measures	Create a new measure	Action	Approve	Observe
	Change an existing measure	Action	Approve	Observe
	Report results	Action	Observe	Observe
	Delete an existing measure	Action	Approve	Observe
Executive Progress Reports	Create "new" EPR for biennium	Action	Approve	Comment and Review
	Update EPR for General Assembly changes	Action	Approve	Comment and Review

STRATEGIC PLANNING HANDBOOK OVERVIEW

The following handbook serves as a tool for users to find definitions, examples, and tips on creating each element of the strategic plan, program/service area plans, and Executive Progress Report. The handbook also includes detailed system instructions on how to navigate through the strategic planning module within the Performance Budgeting System.

Detailed calendars with submission deadlines and time sensitive information will be posted on the DPB Strategic Planning Webpage: <http://dpb.virginia.gov/sp/sp.cfm> and sent via the DPB Strategic Planning list serve.

SYSTEM INSTRUCTIONS – GENERAL

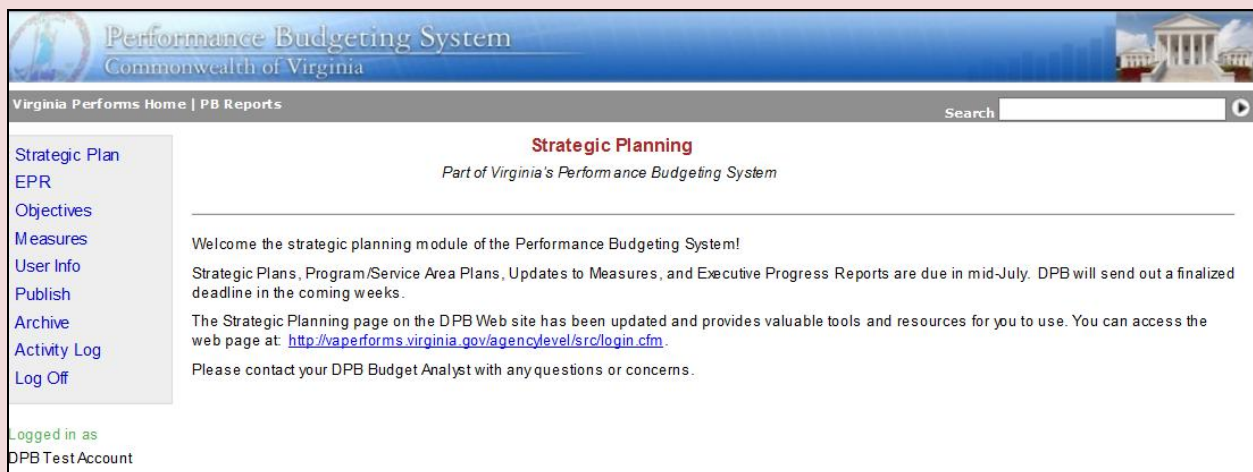
Users will enter the Strategic Planning module through the Performance Budgeting (PB) System. If you do not have login credentials to access the Strategic Planning module you should contact your DPB Budget Analyst.

Step 1 – System Entry:

- Users who have access to the budget modules within the PB system can access the Strategic Planning module via the PB work tray.
- Users who have Strategic Plan access only can access the module using the following link: <http://vaperforms.virginia.gov/agencylevel/src/login.cfm>. It is recommended that you bookmark this link for easy access.
- All users will need to enter their log-in credentials to enter the system.

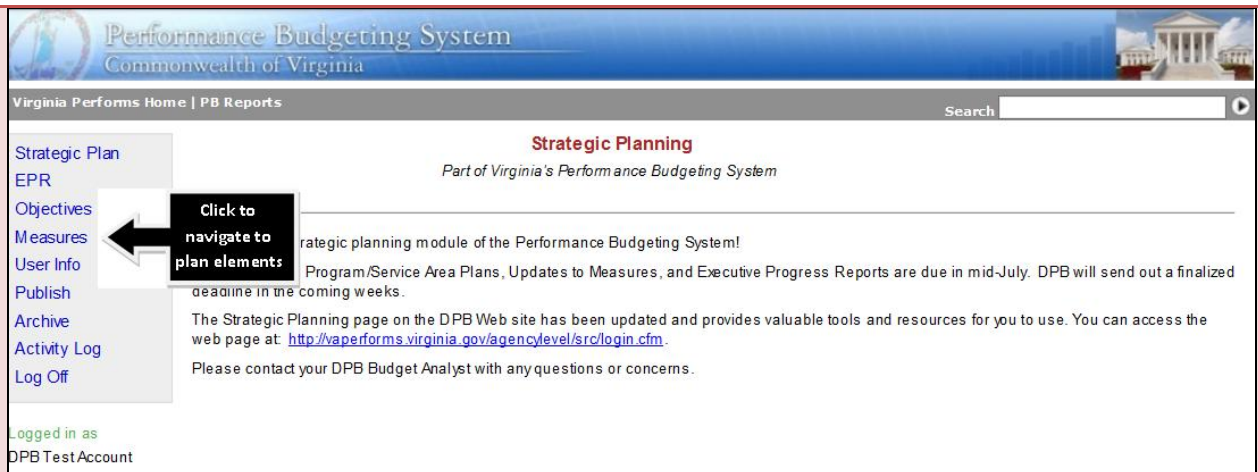
Step 2:

- Once you have access the Strategic Planning module, you will be presented with the following welcome screen. This welcome screen will provide you any important or time sensitive system information as well as upcoming deadlines and events.



Step 3:

- To navigate to various elements of the strategic planning module, use the navigation buttons highlighted in the grey box on the left side of the screen as demonstrated below.



Step 4:

- When selecting the “Strategic Plan” or “EPR” from the navigation menu, you will be presented with a filter that will allow you to select which elements and/or groups of elements of the **strategic plan, program/service area plan, or Executive Progress Report** you wish to edit.
- Click on the elements you wish to select.
- To clear the filter selections, press the “x” in the top left corner of the section you would like to clear.
- To select all the plan elements for a selection, press the “✓” in the top left corner of the section you would like to clear.
- Press Submit.

Performance Budgeting System
Commonwealth of Virginia

Virginia Performs Home | PB Reports Search

Strategic Plan

[EPR](#)

[Objectives](#)

[Measures](#)

[User Info](#)

[Publish](#)

[Archive](#)

[Activity Log](#)

[Log Off](#)

Logged in as
DPB TestAccount

Strategic Plan Filter

Select the strategic planning elements that you would like to work on

Agency

122: Department of Planning and Budget

Plan Version

2014-16

Clear All X

Agency Plan

☒ Mission and Vision

☐ Values

☐ Information Technology

☐ Finance

☐ Customers

☐ Partners

☐ Agency Goals

☐ Objectives

☐ Measures

☐ Supporting Documents

Program /Service Area Plans

71502: Budget Development and Budget Execution Services

71504: Legislation and Executive Order Review Service

71505: Forecasting and Regulatory Review Services

71506: Program Evaluation Services

71598: Administrative Services

☒ Description

☒ Mission Alignment

☐ Products and Services

☐ Finance

☐ Supporting Documents

Select All ✓

Submit **Press Submit**

☐ Show Audit Information

Step 5:

- When selecting “Objectives” or “Measures” from the navigation menu, you will be presented with a listing of your agency objectives and measures. To select an objective or measure to edit, click the name of the objective or measure as demonstrated below.
- Users can create new objectives or measures by selecting the “Create a new Objective/Create a new Measure” button at the top of the form.
- For detailed instructions on creating new or editing objectives and measures, please refer the appropriate section of this handbook.

Performance Budgeting System
Commonwealth of Virginia

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Strategic Plan

[EPR](#)

Objectives

[Measures](#)

[User Info](#)

[Publish](#)

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[Activity Log](#)

[Log Off](#)

Logged in as
DPB TestAccount

Manage Objectives

Click on an objective to edit, Click a column header to resort, [Create a new Objective](#), or change the filter options and [Submit](#)

Objective Name	Objective ID	Version
Develop a financially sound budget in which proposed revenue spending can be maintained by recurring revenue over time.	12271502.001	2014-16 ▼
Develop time for planning for major state programs	122	12271505.002
Ensure accuracy of state budget.	122	12271502.002
Ensure that resources are used efficiently and with applicable state and federal requirements.	122	12271598.001
Facilitate improvement of the efficiency and effectiveness of executive branch agency operations.	122	12271506.001
Facilitate ways for local school divisions to save money in non-instructional areas.	122	12271506.002

Step 6:

- Selecting “User Info” from the navigation menu will provide user account information to include your “User Information” and “Agency Permissions.”
- Please note: User information and agency permissions are based on your Performance Budgeting System credentials, if you believe your “User Info” is incorrect, please contact your DPB Budget Analyst.

Step 7:

- Selecting “Publish” from the navigation menu will provide access to the publishing feature of the module.
- For detailed instructions publishing, please refer the appropriate section of this handbook.

Step 8:

- Selecting “Archive” from the navigation menu will provide access to your agency archive of previous versions of the strategic and program\service area plans, and Executive Progress Reports.

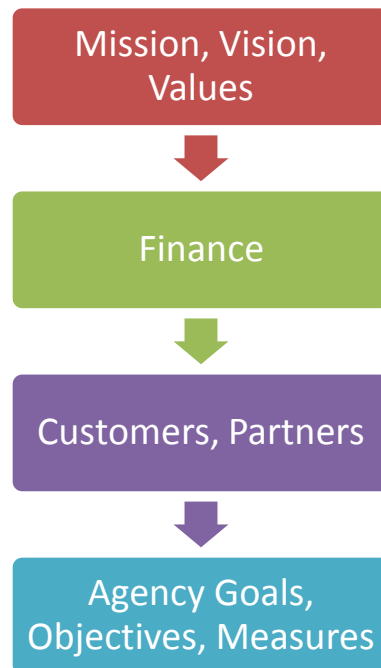
Step 9:

- Selecting the “Activity Log” from the navigation menu will provide a listing of the last major activities/changes saved in the module.

STRATEGIC PLANS

STRATEGIC PLANS: MISSION, VISION, VALUES

A strategic plan provides guidance and direction to the organization and enables its leaders to monitor progress toward the organization's stated goals. The following depicts the overall structure of the agency strategic plan. Following are in-depth explanations of the elements that comprise the strategic plan.



Mission Statement

A mission statement defines or describes an organization's purpose; the fundamental reason for an organization's existence. A mission statement should be broad enough to provide organization-wide strategic direction, yet specific enough to communicate the reason for the organization's existence to those not familiar with its work. Mission statements should be concise and convey the contribution your agency makes to society (e.g., the value you provide to your customers). It should be written so that readers can distinguish it from other mission statements.

Tips for writing a good mission statement:

- Include the agency's name so that the mission statement can stand alone
- Be concise
- Conveys the overarching purpose of the agency
- **Remember – Mission statements are included in the Governor's Executive Budget Document!**

Example of a good mission statement:

The Department of Planning and Budget advises the Governor on how to wisely use public resources for the benefit of all Virginians by analyzing, developing, and carrying out various fiscal, programmatic, and regulatory policies.

Vision Statement

A vision statement is a description of the ideal future state of the organization. It describes the organization at its best – where the organization intends to be in the future or where it should be to best meet the needs of stakeholders.

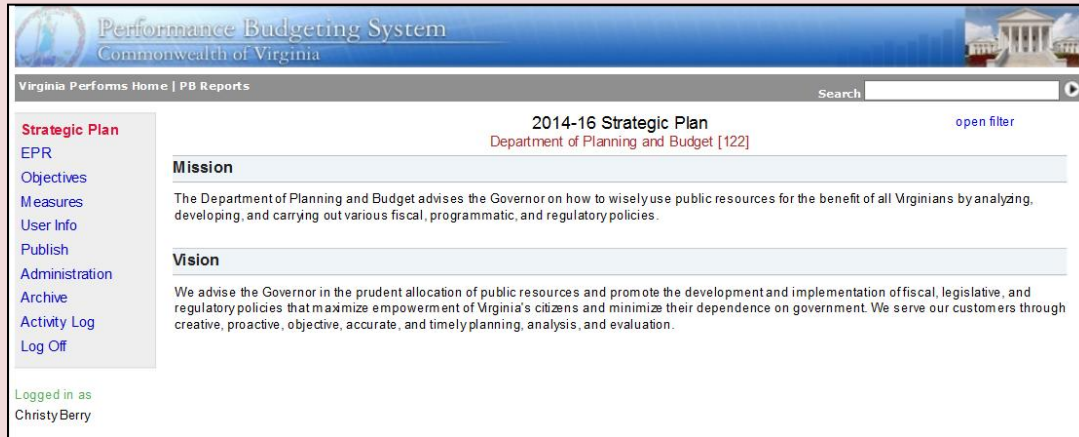
Examples of good vision statements:

- Every resident, visitor, and business in Virginia will have attractive transportation choices – Department of Rail and Public Transportation
- Successful youth, strong families, safe communities – Department of Juvenile Justice

Instructions for entering/editing your mission/vision can be found on the following page.

SYSTEM INSTRUCTIONS – MISSION AND VISION TAB

Step 1: Upon entering the **Mission and Vision** tab you will be presented with the following:



Step 2:

- To edit the "Mission" and "Vision" fields, click in the text and you will be presented a text editing box as demonstrated in the screen shot below.
- Edit the text as necessary. The text box contains limited formatting capabilities.
- Press Save.



Values - OPTIONAL

Values are the principles that govern behavior and the way in which organization and its members conduct business.

Tips for writing values:

- Values are typically listed as words, phrases, or sentences that describe the value
- Values are optional in your strategic plan.
- Bullets are an acceptable format for the listing of values. You may opt to briefly describe the value as well.

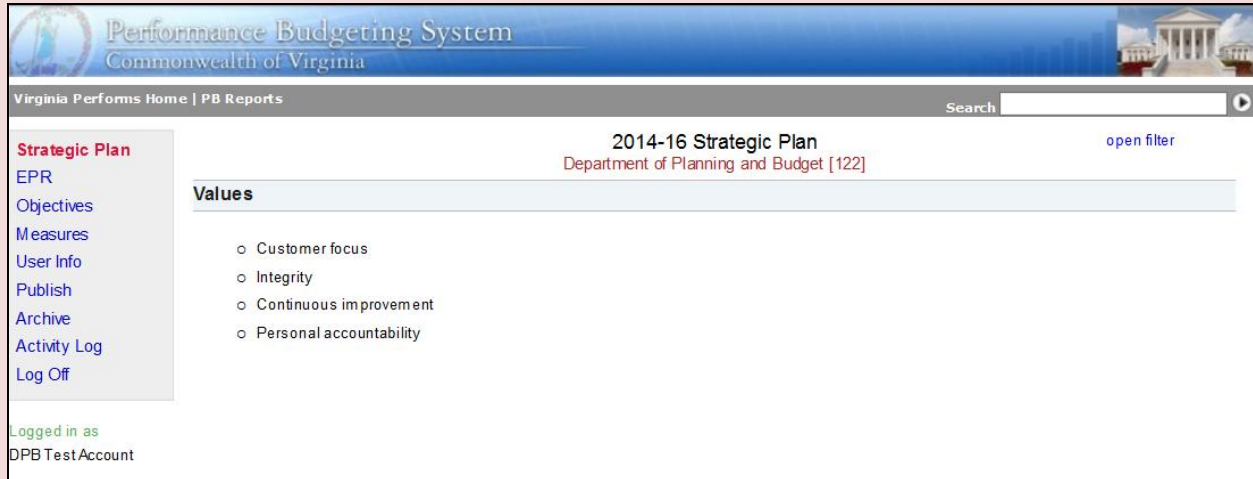
Examples of values:

- Customer focus
- Integrity
- Continuous improvement
- Personal accountability

Instructions for entering/editing your values can be found on the following page.

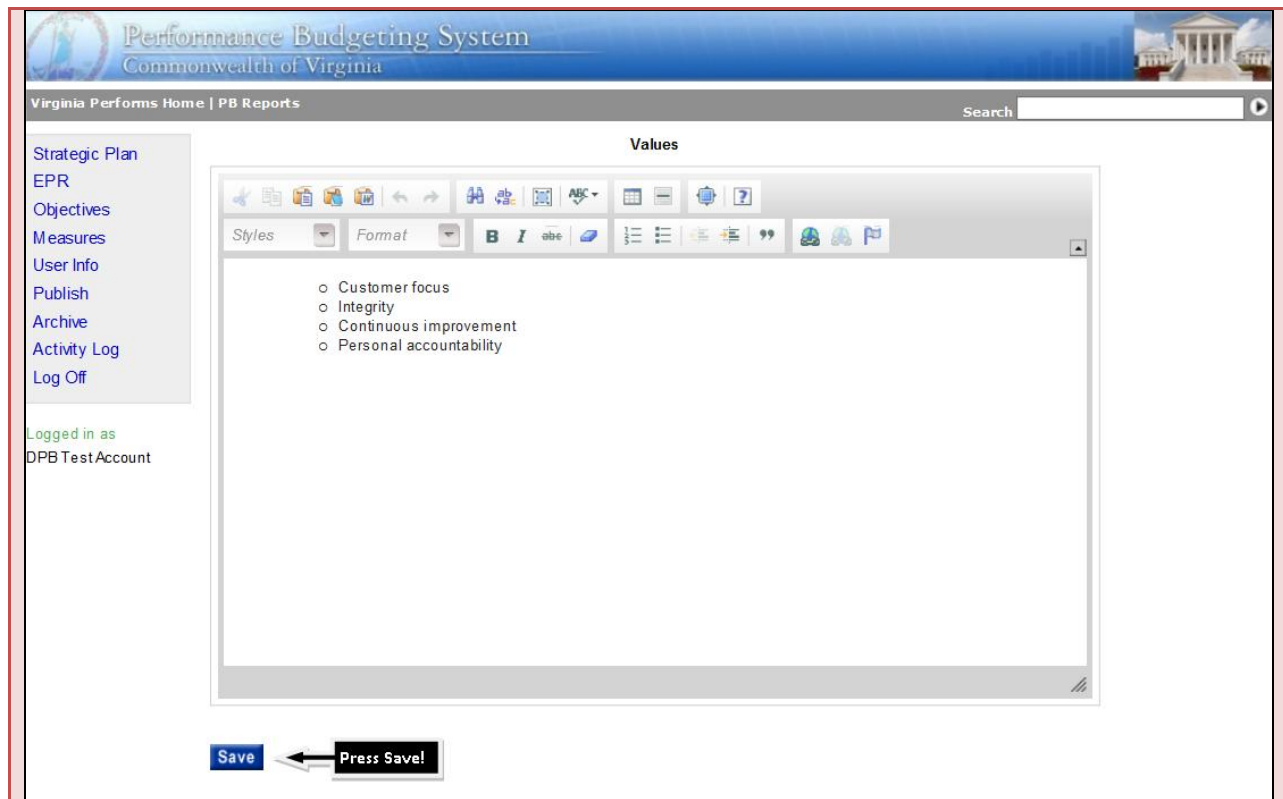
SYSTEM INSTRUCTIONS – VALUES TAB

Step 1: Upon entering the **Values** tab you will be presented with the following:



Step 2:

- To edit the “Values,” click in the text and you will be presented a text editing box as demonstrated in the screen shot below.
- Edit the text as necessary. The text box contains limited formatting capabilities. Bullets are an acceptable format for listing of values.
- Press Save.



STRATEGIC PLANS: INFORMATION TECHNOLOGY

The Information Technology (IT) narrative fields have been moved from the Performance Budgeting System Strategic Planning module to the Commonwealth Technology Portfolio (CTP) system maintained by VITA. VITA will provide agencies with separate instructions and training on these requirements. Please contact your agency AITR for additional information.

STRATEGIC PLANS: FINANCE

Financial Overview

Understanding an agency's financial resources is essential to linking performance management guidelines to the budgeting process. This includes knowing where the resources come from and where they will be spent.

Tips for writing a good financial overview:

- Explain the total spending budget for the agency, the composite funding streams, and any other information that explains the nature and/or destination of the funds
- Talk about what comprises your base budget
- The general tone should not be negative or focused entirely on savings strategies/cuts

Biennial Budget Table

The biennial budget table illustrates the agency's base budget and any changes to that base over the biennium. Changes to base include base budget adjustments and technical adjustments. They also encompass amendments to the base for central appropriation distributions for items such as changes in fringe benefit rates, salary increases, nongeneral fund increases approved administratively that will continue into the new biennium, adjustments to remove one-time expenditures, and to annualize partial year funding.

Tips for using the biennial budget table (screen shots below):

- Base budget is populated from the PB system.
- Changes to the base can also be populated from the PB system by using the "..." import numbers.
- Agencies can overwrite the numbers populated by the PB system in the Changes to Base field if they are incorrect or changes are needed due to anomalies in data.

Instructions for entering/editing your financial information can be found on the following page.

SYSTEM INSTRUCTIONS – FINANCE TAB

Step 1:

- Upon entering the **Finance** tab you will be presented with the following:

The screenshot displays the Virginia Performance Budgeting System interface. At the top, there is a navigation bar with links for Virginia.gov, Online Services, Help, Governor, and General Assembly. Below this is a header for the Performance Budgeting System, Commonwealth of Virginia, with a search bar and a play button icon. The main content area is titled "2014-16 Strategic Plan" and "Department of Planning and Budget [122]". A sidebar on the left contains links for Strategic Plan, EPR, Objectives, Measures, User Info, Publish, Archive, Activity Log, and Log Off. The "Finance" tab is selected, showing a "Financial Overview" section with text about budget support for personnel costs and day-to-day operations. Below this is a "Biennial Budget" table comparing 2015 and 2016 General and Nongeneral Fund appropriations. A note at the bottom states: "(Changes to Initial Appropriation will be 0 when the plan is created. They will change when the plan is updated mid-biennium.)"

Virginia.gov Online Services | Help | Governor | General Assembly

Performance Budgeting System
Commonwealth of Virginia

Virginia Performs Home | PB Reports Search

2014-16 Strategic Plan
Department of Planning and Budget [122] open filter

Finance

Financial Overview

Seventy-eight percent of DPB's general fund budget supports personnel costs: salaries, wages, and fringe benefits. The remaining budget supports day-to-day operations: funding for rent, information technology needs, the School Efficiency Review Program, the Council on Virginia's Future, insurances, training, office supplies, and other miscellaneous costs.

In accordance with Chapter 835, 2012 Virginia Acts of Assembly, the Commonwealth Competition Council was eliminated. The 2013 General Assembly removed the \$250,000 Non-General Fund (NGF) designated for the Commonwealth Competition Council FY 2014.

Biennial Budget

	2015 General Fund	2015 Nongeneral Fund	2016 General Fund	2016 Nongeneral Fund
Initial Appropriation for the Biennium	7,382,224	300,000	7,410,850	300,000
Change to Initial Appropriation	0	0	0	0


(Changes to Initial Appropriation will be 0 when the plan is created. They will change when the plan is updated mid-biennium.)

Step 2:

- To edit the "Financial Overview," click in the text and you will be presented a text editing box as demonstrated in the screen shot below.
- Edit the text as necessary. The text box contains limited formatting capabilities.
- Press Save.


Step 3:

- To edit/update your Biennial Budget, click into the “Biennial Budget” table and you will be presented the ability to either manually enter/update your biennial budget as demonstrated in the screen shot below or to import from the PB System.
- Note: The numbers presented are from the last time you updated/saved.
- To manually enter/edit the numbers, click into the cell you wish to edit and make the change.
- To import your biennial budget from the PB System, click the “import numbers from PB System.” You must do this each time you edit/update your plan, they do not automatically update.
- You can edit the numbers imported from the PB System if needed. This should be done if you have any anomalies in your budget, but should be explained in the financial overview.
- Press Save.



Performance Budgeting System

Commonwealth of Virginia



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Search

[Strategic Plan](#)
[EPR](#)
[Objectives](#)
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[Log Off](#)

2014-16 Biennial Budget

Department of Planning and Budget [122]

Import Numbers

[Import numbers from PB System](#)

Edit the information in the table and click SAVE

	2015 General Fund	2015 Nongeneral Fund	2016 General Fund	2016 Nongeneral Fund
Initial Appropriation for the Biennium	\$7,382,224	\$300,000	\$7,410,850	\$300,000
Change to Initial Appropriation	\$0	\$0	\$0	\$0

Save

Press Save!

Logged in as

DPB TestAccount

STRATEGIC PLANS: CUSTOMERS

Anticipated Changes to Customer Base

Customers are any individual, group of individuals, organization, or organizational units for whom products and services are supplied. Customers can be internal or external. Understanding the composition of your customer base and planning for anticipated changes to the customer base is pivotal in resource planning.

Tips for writing your anticipated changes to customer base:

- Are your customers going to increase or decrease over the next couple of years?
- Are your customers aging?
- Any new federal requirements being placed on your customers?

Current Customer List

Your current customer list should be an inclusive list of the customers/clients you serve. A customer taxonomy referred to as “PredefinedGroup” in the strategic planning system allows for you to select a defined common group of customer and the accompanying field allows for you to define the customer specifically for your agency.

Tips for completing your current customers list:

- Are your customers going to increase or decrease over the next couple of years?
- Citizens of the Commonwealth is too vague, you should define this more discretely.

Instructions for entering/editing your customer information can be found on the following page.

SYSTEM INSTRUCTIONS – CUSTOMERS TAB

Step 1:

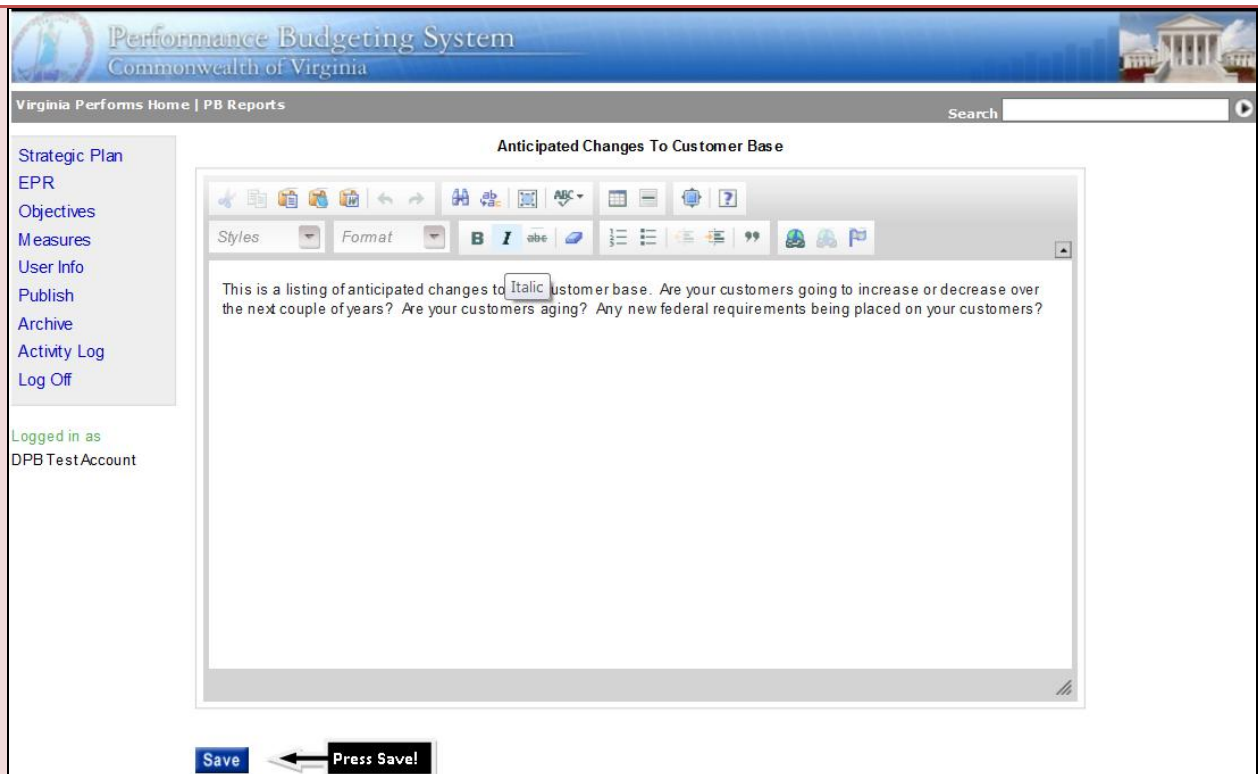
- Upon entering the **Customers** tab you will be presented with the following:

The screenshot displays the Performance Budgeting System interface for the Commonwealth of Virginia. The header includes the system name and a search bar. The left sidebar contains navigation links: Strategic Plan, EPR, Objectives, Measures, User Info, Publish, Archive, Activity Log, and Log Off. The main content area is titled '2014-16 Strategic Plan' and 'Department of Planning and Budget [122]'. Below this, the 'Customers' tab is selected. The 'Anticipated Changes to Customer Base' section contains a text box for user input. The 'Current Customer List' section features a table with five columns: PredefinedGroup, UserDefinedGroup, Number Served Annually, Potential Number of Annual Customers, and Projected Customer Trend. The table lists six customer groups with their respective served and potential numbers and trends.

PredefinedGroup	UserDefinedGroup	Number Served Annually	Potential Number of Annual Customers	Projected Customer Trend
State Agency(s).	State agencies	150	0	Stable
Local or Regional Government Authorities	Local school divisions	32	0	Stable
Governor	Governor's Secretaries and Deputy Secretaries	15	0	Stable
Governor	Governor's Policystaff	15	0	Stable
Governor	Governor	15	0	Stable

Step 2:

- To edit the “Anticipated Changes to Customer Base,” click in the text and you will be presented a text editing box as demonstrated in the screen shot below.
- Edit the text as necessary. The text box contains limited formatting capabilities.
- Press Save.




Step 3:

- To edit/update your Customer, click into the Current Customers table and you will be presented the ability to edit, add, or delete a current customer from the table.
- You should first select the column entitled "PredefinedGroup." This group is from the customer taxonomy (Appendix I).
- After selecting the "PredefinedGroup," you should select the column entitled "UserDefinedGroup" which is essentially your customer in your terminology.
- Key in the number of each customer served annually.
- Key in the potential number of annual customers.
- Select the projected trend in each customer.
- You can prioritize your customers using the arrow keys to the left.
- You can delete customers by using the red "x" on the left.
- To add a customer, you should click insert row which is at the bottom of the grid.
- Press Save.



Performance Budgeting System
Commonwealth of Virginia



Virginia Performs Home | PB Reports

Search

Strategic Plan
EPR
Objectives
Measures
User Info
Publish
Archive
Activity Log
Log Off

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DPB Test Account

Delete Row

Insert Row

2014-16 Current Customers Listing
Department of Planning and Budget [122]

Edit the information in the table and click SAVE

	PredefinedGroup	UserdefinedGroup	Number Served Annually	Potential Number of Annual Customers	Projected Customer Trend
✖ ↓ ↑	State Agency(s),	State agencies	150	0	Stable ▼
✖ ↓ ↑	Local or Regional Government Authorities	Local school divisions	32	0	Stable ▼
✖ ↓ ↑	Governor	Governor's Secretaries and Deputy Secre	15	0	Stable ▼
✖ ↓ ↑	Governor	Governor's Policy staff	15	0	Stable ▼
✖ ↓ ↑	Governor	Governor	15	0	Stable ▼
✖ ↓ ↑	General Assembly	General Assembly members	0	0	Stable ▼
✖ ↓ ↑	State Agency(s),	DPB staff	0	0	Stable ▼
✖ ↓ ↑	Governor	Council on Virginia's Future (members)	0	0	Stable ▼

Insert Row

Save

Press Save!

STRATEGIC PLANS: PARTNERS

Partners - optional

Partners are organizations that a state agency uses or collaborates with to deliver products and services. In Virginia, there are agencies that do not have complete authority and/or responsibility for the delivery of their services to end customers. For example, some agencies deliver their services through a state-supervised, locally administered system. Therefore, the achievement of some of the agency's strategic goals/outcomes may be dependent, in part, on the performance of the agency's partners.

Examples of partners include:

- Private contractors that provide snow removal services
- 120 local departments of social services
- Community action agencies

Instructions for entering/editing your partner information can be found on the following page.

SYSTEM INSTRUCTIONS – PARTNERS TAB

Step 1:

- Upon entering the Partners Tab you will be presented with the following:

Performance Budgeting System
Commonwealth of Virginia

Virginia Performs Home | PB Reports

2014-16 Strategic Plan
Department of Planning and Budget [122] [open filter](#)

Partners

Name	Description
Private contractors that provide snow removal	Snow removal services
120 local departments of social services	DSS
Community action agencies	Neighborhood watch, DARE, etc.

Logged in as
DPB Test Account

Step 2:

- To edit the Partners grid, click in the text and you will be presented with an editable grid.
- You can prioritize your partners using the arrow keys to the left.
- You can delete partners by using the red “x” on the left.
- To add partners, you should click insert row which is at the bottom of the grid.
- Press Save!

Performance Budgeting System
Commonwealth of Virginia

Virginia Performs Home | PB Reports

2014-16 Partners
Department of Planning and Budget [122]

Partners - Edit the information in the table and click SAVE

	Name	Description
✗ ↓ ↑	Private contractors that provide snow removal	Snow removal services
✗ ↓ ↑	120 local departments of social services	DSS
✗ ↓ ↑	Community action agencies	Neighborhood watch, DARE, etc.

[Insert Row](#) [Save](#) **Press Save!**

Logged in as
DPB Test Account

STRATEGIC PLANS: AGENCY GOALS

Goals

Goals are broad statements on the long-term results needed to accomplish the organization's mission and to achieve its vision.

Tips for writing good goals:

- Typically starts with a verb and is phrased in general language (strengthen, serve, become, or improve)
- May include a broad performance target to be achieved in a specific timeframe (to achieve 75 percent improvement by 2014)
- Keep the number of goals manageable – five to seven is considered manageable
- A goal is long-term and may extend past the biennium

Examples of goals:

- Cultivate a diverse workforce capable of accomplishing the system's mission
- Rank among the top 10 states in the U.S. in the number of successful adoptions of children with disabilities
- Enhance the independence, well being, and personal responsibility of customers

Summary and Alignment

Summarizing the purpose of your goal and explaining how the goal aligns with your mission gives the reader a better understanding of the goal.

Tips for writing your summary and alignment:

- Explain what your goal is trying to achieve.
- How does the goal directly impact your agency's mission?
- Does the goal align to an external factor such as a federal mission/program? A statewide program/mission?

Examples of summary and alignment:

- By assisting citizens to become independent and achieve a level of personal responsibility they will, in turn, achieve a higher level of well being. This will increase the available work force within Virginia and assist in economic growth. This aligns with the economic long-term objective

of Virginia. (Goal – Enhance the independence, well being, and personal responsibility of customers).

- In enabling the department to achieve efficiency and effectiveness benefits and to support Virginia’s long-term objective of Best Managed State, it must ensure it has a workforce that is capable of the challenges posed. (Goal – Cultivate a diverse workforce capable of accomplishing the system’s mission.

Long-term goals

Long-term goals have been established by the Council on Virginia’s Future to help define the vision for Virginia’s future: Responsible economic growth, an enviable quality of life, good government, and a well-educated citizenry prepared to lead successful lives and to be engaged in shaping the future of the Commonwealth. The seven long-term goals are as follows:

- **Be a national leader in the preservation and enhancement of our economy.**
- **Elevate the levels of educational preparedness and attainment of our citizens.**
- **Inspire and support Virginians toward health lives and strong and resilient families.**
- **Protect, conserve and wisely develop our natural, cultural and historic resources.**
- **Protect the public’s safety and security, ensure a fair and effective system of justice, and provide a prepared response to emergencies and disasters of all kinds.**
- **Ensure Virginia has a transportation system that is safe, allows easy movement of people and goods, enhances the economy, and improves our quality of life.**
- **Be recognized as the best-managed state in the nation.**

Instructions for entering/editing your agency goals can be found on the following page.

SYSTEM INSTRUCTIONS – AGENCY GOAL TAB

Step 1:

- Upon entering the Agency Goal Tab you will be presented with the following.
- To create a new goal, click the button in the top right corner of the screen.
- To reorder your goals, click the button in the top right corner of the screen.

Performance Budgeting System
Commonwealth of Virginia

Virginia Performs Home | PB Reports

2014-16 Strategic Plan
Department of Planning and Budget [122]

open filter

Agency Goals

Create New Goal

Create New Goal Reorder

Reorder Goals

- Provide the highest quality financial management for the Commonwealth to protect its fiscal integrity.
Summary and Alignment
Accomplishment of this goal helps protect the state's fiscal reputation, its AAA bond rating, and its status as a best-managed state.
- Provide objective, accurate, and timely information with respect to planning and evaluation of fiscal, legislative and regulatory activities, in order to enhance the efficiency and effectiveness of state government.
Summary and Alignment
Accomplishment of this goal helps protect the state's fiscal reputation, its AAA bond rating, and its status as a best-managed state.
- Continue to strengthen communication and relationships with customers.
Summary and Alignment
Accomplishment of this goal would help protect the state's fiscal reputation, its AAA bond rating, and its longstanding status as a best-managed state.

Logged in as
DPB TestAccount

Step 2:

- To create a new goal, once you have clicked the create new goal button, you will be presented with the following screen.
- Enter your new goal in the box and press Save!
- Once you press save, your goal will be saved and appear at the top of your goal listing.

Performance Budgeting System
Commonwealth of Virginia

Virginia Performs Home | PB Reports

2014-16 Strategic Plan
Department of Planning and Budget [122]

open filter

Agency Goals

Create New Goal Reorder

Name of New Goal

Save

Press Save!

- Provide the highest quality financial management for the Commonwealth to protect its fiscal integrity.
Summary and Alignment
Accomplishment of this goal helps protect the state's fiscal reputation, its AAA bond rating, and its status as a best-managed state.
- Provide objective, accurate, and timely information with respect to planning and evaluation of fiscal, legislative and regulatory activities, in order to enhance the efficiency and effectiveness of state government.
Summary and Alignment
Accomplishment of this goal helps protect the state's fiscal reputation, its AAA bond rating, and its status as a best-managed state.
- Continue to strengthen communication and relationships with customers.
Summary and Alignment
Accomplishment of this goal would help protect the state's fiscal reputation, its AAA bond rating, and its longstanding status as a best-managed state.

Logged in as
DPB TestAccount

Step 3:

- To edit your goals and its attributes or to add attributes to a new goal, click on the goal name in the grid presented in Step 1 and you will be presented with a screen that will allow you to edit/modify your goal and its associated attributes.
- Select one state long-term goal that your goal closely aligns with.
- Upon selecting your state long-term goal, you will be prompted with a drop-down menu to select one societal indicator that your goal closely aligns with.
- Please note: if your goal does not align with a state long-term goal or a societal indicator, you do not need to “force” an alignment. However, if your goal does align with a state long-term goal, societal indicator, or both, please ensure you make the alignment.
- To delete a goal, select the “Delete” button at the bottom of the form.

Virginia Performs Home | PB Reports

Search

Strategic Plan
EPR
Objectives
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Agency Goal
2014-16 Agency Plan

Goal Name
Provide the highest quality financial management for the Commonwealth to protect its fiscal integrity.

Goal ID
122.G01

Summary and Alignment
<p>Accomplishment of this goal helps protect the state's fiscal reputation, its AAA bond rating, and its status as a best-managed state.</p>

Logged in as
DPB Test Account

State Long-term Goals (select the most appropriate match)

<input type="checkbox"/> Economy	Be a national leader in the preservation and enhancement of our economy.
<input type="checkbox"/> Education	Elevate the levels of educational preparedness and attainment of our citizens.
<input checked="" type="checkbox"/> Government and Citizens	Be recognized as the best-managed state in the nation.
<input type="checkbox"/> Health & Family	Inspire and support Virginians toward he... milies.
<input type="checkbox"/> Natural Resources	Protect, conserve and wisely develop our natural, historical and cultural resources.
<input type="checkbox"/> Public Interest	Engage and inform citizens to ensure we serve their interests.
<input type="checkbox"/> Public Safety	Protect 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.
<input type="checkbox"/> Transportation	Ensure that Virginia has a transportation system that is safe, enables easy movement of people and goods, enhances the economy and improves our quality of life.


Select the most applicable societal indicator
Government Operations

Press Save

Save Delete Delete Goal


Step 4:

- To reorder your goals, once you have clicked the reorder goal button in the top right corner of the goal screen presented in Step 1, you will be presented with the following screen.
- Reorder your goals by typing the number priority for each of your goals. You should use a numbering scheme that makes it easy for you to add or subtract goals without having to reorder every goal each time you add a new goal. For demonstration purposes, I assigned our new goal as “1.1” so that the goal would show up second my goal list without having to reorder all of my goals.
- Press Submit once you are done reordering your goals.



Performance Budgeting System

Commonwealth of Virginia



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Strategic Plan

EPR

Other

My Goals

Us

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Reorder your goals

Agency Goals

Enter numbers to indicate the order you would like these goals to appear in your plan.

1

Provide the highest quality financial management for the Commonwealth to protect its fiscal integrity.

2

Provide objective, accurate, and timely information with respect to planning and evaluation of fiscal, legislative and regulatory activities, in order to enhance the efficiency and effectiveness of state government.

3

Continue to strengthen communication and relationships with customers.

4

Attract and retain highly qualified and energetic individuals to carry out the mission of the agency.

Submit

Press Submit

Logged in as

DPB Test Account

STRATEGIC PLANS: OBJECTIVES

Objectives

Objectives are 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, but the number should be manageable.

Tips for writing good objectives:

- Should be measurable
- Usually begins with a verb or an introductory phrase, followed by a verb
- May support multiple initiatives or strategies
- Describe the results needed to accomplish a goal
- Collectively may address key business areas

Examples of objectives:

- Enhance food safety and security programs for citizens of the Commonwealth (Supports Goal: Ensure a safe and wholesome food supply)
- Promote through logging inspections the replanting of sites using Reforestation of Timberlands cost share in order to limit the loss of forested acres (Supports Goal: Improve the stewardship, health, and diversity of the forest)

Objective strategies

Objective strategies are actions that support the accomplishment of the strategic plan and deliver the results needed to accomplish the objectives. The methods of achieving an objective are the actions or tasks an agency intends to carry out to accomplish its objectives within a specified time frame. When monitoring measures, it is the adjustment of these strategies that will influence the direction of the measures.

Tips for writing good objectives strategies:

- Succinct
- Explain what the agency is doing to help accomplish its objectives
- Tasks

Examples of objective strategies:

- Customer service standards development

- Development and delivery of customer service training for all employees
- Establishment of an employee awards and recognition program

Instructions for entering/editing your objectives can be found on the following page.

SYSTEM INSTRUCTIONS – OBJECTIVES TAB

NOTE: Users have two options for accessing their objectives. You can access them through the filter navigation or by utilizing the objectives button on the left side of the screen. The system instructions below detail both option for accessing objectives.

Filter navigation

When you select objectives using the filter navigation agency goals will automatically be selected as demonstrated below.

The screenshot shows the 'Performance Budgeting System' interface for the Commonwealth of Virginia. The main heading is '2014-16 Strategic Plan'. Below this is a 'Strategic Plan Filter' section with the instruction 'Select the strategic planning elements that you would like to work on'. The filter includes a dropdown for 'Agency' (122: Department of Planning and Budget) and a dropdown for 'Plan Version' (2014-16). There are two main sections for selecting elements: 'Agency Plan' and 'Program / Service Area Plans'. The 'Agency Plan' section has checkboxes for Mission and Vision, Values, Information Technology, Finance, Customers, Partners, Agency Goals (checked), Objectives (checked), Measures, and Supporting Documents. The 'Program / Service Area Plans' section has checkboxes for Description, Mission Alignment, Products and Services, Finance, and Supporting Documents. A 'Submit' button is located at the bottom left of the filter section. On the left sidebar, there are links for Strategic Plan, EPR, Objectives, Measures, User Info, Publish, Archive, Activity Log, and Log Off. The user is logged in as 'DPB TestAccount'.

Step 1:

- Upon entering the Goal/Objective tab you will be presented with the following. **Please note:** System instructions for modifying agency goals appear in the agency goals section of this handbook.

Performance Budgeting System
Commonwealth of Virginia

Virginia Performs Home | PB Reports Search

Strategic Plan
[EPR](#)
[Objectives](#)
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Logged in as
DPB Test Account

2014-16 Strategic Plan
Department of Planning and Budget [122] [open filter](#)

Agency Goals [Create New Goal](#) [Reorder](#)

- Provide the highest quality financial management for the Commonwealth to protect its fiscal integrity.
Summary and Alignment
 Accomplishment of this goal helps protect the state's fiscal reputation, its AAA bond rating, and its status as a best-managed state.
Associated State Goal
 Government and Citizens: Be recognized as the best-managed state in the nation.
Associated Societal Indicator
 Bond Rating
Objectives [Objective Links for this Goal](#)
 No objectives currently linked to this agency goal
- Provide objective, accurate, and timely information with respect to planning and evaluation of fiscal, legislative and regulatory activities, in order to enhance the efficiency and effectiveness of state government.
Summary and Alignment
 Accomplishment of this goal helps protect the state's fiscal reputation, its AAA bond rating, and its status as a best-managed state.
Objectives [Objective Links for this Goal](#)
 » Strive to maintain a high level of satisfaction from the Governor's Policy Office and the Cabinet regarding information and analysis provided to them by the Department of Planning and Budget (DPB).
Description

Step 2:

- To link or create an objective for a goal, click the "objective links for this goal" button as demonstrated below.

Performance Budgeting System
Commonwealth of Virginia

Virginia Performs Home | PB Reports Search

Strategic Plan
[EPR](#)
[Objectives](#)
[Measures](#)
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[Log Off](#)

Logged in as
DPB Test Account

2014-16 Strategic Plan
Department of Planning and Budget [122] [open filter](#)

Agency Goals [Create New Goal](#) [Reorder](#)

- Provide the highest quality financial management for the Commonwealth to protect its fiscal integrity.
Summary and Alignment
 Accomplishment of this goal helps protect the state's fiscal reputation, its AAA bond rating, and its status as a best-managed state.
Associated State Goal
 Government and Citizens: Be recognized as the best-managed state in the nation.
Associated Societal Indicator
 Bond Rating
Objectives [Objective Links for this Goal](#)
 No objectives currently linked to this agency goal
- Provide objective, accurate, and timely information with respect to planning and evaluation of fiscal, legislative and regulatory activities, in order to enhance the efficiency and effectiveness of state government.
Summary and Alignment
 Accomplishment of this goal helps protect the state's fiscal reputation, its AAA bond rating, and its status as a best-managed state.
Objectives [Objective Links for this Goal](#)
 » Strive to maintain a high level of satisfaction from the Governor's Policy Office and the Cabinet regarding information and analysis provided to them by the Department of Planning and Budget (DPB).
Description

Step 3:

- To link an objective to a goal, choose the previously created objective from the list presented in the grid, and then select "link" which is located on the left side of the grid as demonstrated

below.

- If you need to delete a link, select “unlink” which is located on the left side of the grid.
- You can reorder/prioritize you objective links using the arrows located on the right of the grid.
- Save your links!

Performance Budgeting System
Commonwealth of Virginia

Virginia Performs Home | PB Reports

Strategic Plan Version: 2014-16
Department of Planning and Budget [122] (Goal ID: 122.G01)

Agency Goal: Provide the highest quality financial management for the Commonwealth to protect its fiscal integrity.

Objectives Linked to this Goal

	Objective Name	Objective Id	Reorder
unlink	Develop a financially sound budget in which proposed recurring spending can be maintained by recurring revenue over time.	12271502.001	↓ ↑

Other Objectives Not Linked to this Goal

	Objective Name	Objective Id	Existing Links
link	Strive to maintain a high level of satisfaction from the Governor's Policy Office and the Cabinet regarding information and analysis provided to them by the Department of Planning and Budget (DPB).	12200000.002	122.G02
link	Develop timely and accurate forecasts for major state programs for planning and budgeting purposes.	12271505.002	

Step 4:

- To create a new objective, select “create new objective” at the top of the grid as demonstrated below.

Performance Budgeting System
Commonwealth of Virginia

Virginia Performs Home | PB Reports

Strategic Plan Version: 2014-16
Department of Planning and Budget [122] (Goal ID: 122.G01)

Agency Goal: Provide the highest quality financial management for the Commonwealth to protect its fiscal integrity.

Objectives Linked to this Goal

	Objective Name	Objective Id	Reorder
unlink	Develop a financially sound budget in which proposed recurring spending can be maintained by recurring revenue over time.	12271502.001	↓ ↑

Other Objectives Not Linked to this Goal

	Objective Name	Objective Id	Existing Links
link	Strive to maintain a high level of satisfaction from the Governor's Policy Office and the Cabinet regarding information and analysis provided to them by the Department of Planning and Budget (DPB).	12200000.002	122.G02
link	Develop timely and accurate forecasts for major state programs for planning and budgeting purposes.	12271505.002	

Step 5:

- After choosing to create a new objective, you will be presented with an editable grid where you can create a new objective and provide an objective description as demonstrated below.
- You can also link to an established measure from this screen.
- You can also delete an objective from this screen.

- Press Save!

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Logged in as
DPB TestAccount

Objective

Agency: 122: Department of Planning and Budget

Version: 2014-16

Objective Name: [Text Box]

Description: [Text Box]

Save New Objective

Save Delete

Delete New Objective

Measures linked to this Objective

Measure ID	Measure Name

Link to a Measure

Link to Measure

Update History
No history

Step 6:

- Upon pressing save, you will be presented with options to link the new objective to strategies, goals, and measures as demonstrated in the screen shot below.

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Objective

Agency: [122]

Version: 2014-16

Objective Name: New Objective Name

Description: New Objective Description.

Save Links 122.0001

Save Delete

Delete Links

Add Strategy

Add Strategy Delete the text and save to delete a strategy

Link to Agency Goal

Link to an Agency Goal

Link to a Measure

Link to a Measure

Agency Goals linked to this Objective for 2014-16

Measures linked to this Objective

Measure ID	Measure Name

Step 7:

- To add a strategy, click on the “add strategy” link on the left.
- After clicking you will be presented with a text box that will allow you to add a strategy for the new measure.
- You can add multiple strategies for the new objective by continuing to click the “add strategy”

button.

Performance Budgeting System
Commonwealth of Virginia

Virginia Performs Home | PB Reports

Search

Objective

Agency: [122]
Version: 2014-16
Objective ID: 122.0001

Objective Name
New Objective Name

Description
New Objective Description.

Strategies
New strategy | Add Strategy Text Here

Add Strategy Delete the text and save to delete a strategy

Add Multiple Strategies

Link to an Agency Goal
Link to a Measure

Measure ID	Measure Name
------------	--------------

Step 8:

- To link to an agency goal, click the “link to an agency goal” on the right as demonstrated in Step 6.
- After clicking, you will be presented with a listing of all of your agency goals as demonstrated below.

Performance Budgeting System
Commonwealth of Virginia

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DPB TestAccount

Agency Goals

Click on a Goal to create a link to this objective for your 2014-16 plan

Goal	Goal ID
Attract and retain highly qualified and energetic individuals to carry out the mission of the agency.	122.G04
Continue to strengthen communication and relationships with customers.	122.G03
Provide objective, accurate, and timely information for planning and order to enhance the efficiency and effectiveness of the agency.	122.G02
Provide the highest quality financial management for the Commonwealth to protect its fiscal integrity.	122.G01

Click on goal that links to your objective

Objective ID: 122.0001

Save Delete

Link to an Agency Goal

Link to a Measure

Measures linked to this Objective

Measure ID	Measure Name
------------	--------------

- Click the goal from the list that aligns and links with your newly created objective.
- To unlink a goal from an objective, click the “unlink” button to the right of your goal listing within an objective.
- You can link to more than one agency goal, by continuing to click the “link to agency goal” button.
- Press Save!

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DPB TestAccount

Objective

Agency: [122]
Version: 2014-16

Objective Name
New Objective Name

Description
New Objective Description.

Strategies
[Add Strategy](#) Delete the text and save to delete a strategy

Agency Goals linked to this Objective for 2014-16

Goal	Goal ID
Continue to strengthen communication and relationships with customers.	[122.G03]

Unlink Goals

Link to an Agency Goal

Link to a Measure

Measures linked to this Objective

Measure ID	Measure Name
------------	--------------


Step 9:

- To link to a measure, click the “link to a measure” on the right.
- After clicking, you will be presented with a listing of all of your agency measures as demonstrated below.
- Click the measure code from the list that aligns and links with your newly created object.


The screenshot shows the 'Performance Budgeting System' interface for the Commonwealth of Virginia. The page title is 'Virginia Performs Home | PB Reports'. On the left is a navigation menu with links: Strategic Plan, EPR, Objectives, Measures, User Info, Publish, Archive, Activity Log, and Log Off. The main content area is titled 'Measures' and contains a table of measures linked to Objective ID: 122 0001. A black callout box with a white arrow points to the measure code '12271502.002.002' in the table, with the text 'Click on the measure code that links to your objective'. To the right of the table are buttons for 'Save' and 'Delete', and a 'Link to an Agency Goal' button. Below the table is a section titled 'Measures linked to this Objective' with a table showing 'Measure ID' and 'Measure Name'. At the bottom right, there is a 'Link to a Measure' button.

Measure ID	Measure Name
12200000.002.001	Average rate of survey respondents' satisfaction with the timeliness and quality of the agency's analyses.
12271502.001.001	to recurring general fund spending.
12271502.002.002	s as a percentage of legislative
12271504.001.001	ned to the agency (excluding those marked "no review") for which fiscal impact statements were issued.
12271504.001.003	Average satisfaction rating of the Governor's policy staff with the quality and timeliness of the impact analyses.
12271505.001.001	Percentage of economic impact analyses that are completed within 45 days from receipt of proposed and fast-track (stage) regulatory proposals.
12271505.002.002	Accuracy of the agency's forecast for total state responsible inmate population.
12271506.001.001	Percent of evaluation study recommendations accepted.
12271506.002.001	Percent of school efficiency recommendations implemented.
M122SA12001	Percent of accounts payable transactions that post correctly to the Commonwealth Accounting and Reporting System (CARS)

- To unlink a measure from an objective, click the “unlink” button to the right of your goal listing within an objective.
- You can link to more than one measure, by continuing to click the “link to a measure” button.
- Press Save!



Performance Budgeting System
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Objective

Agency: [122]

Version: 2014-16

Objective Name

New Objective Name

Description

New Objective Description.

Strategies

[Add Strategy](#)
Delete the text and save to delete a strategy

Agency Goals linked to this Objective for 2014-16

Goal

Continue to strengthen communication and relationships with customers. [122.G03]

Measures linked to this Objective

[Link to a Measure](#)

Measure ID	Measure Name
12271502.002.002	Administratively approved appropriations as a percentage of legislative appropriations.

Unlink Measures

[unlink](#)

Save Links

122.0001

Save

Delete

Delete

Link to Additional Agency Measures

Objectives button

Step 1:

- When you select the objectives button from the left side of the screen you will be prompted to select your agency as demonstrated below. If applicable, you are able to narrow your selection by Groups or Secretariats.

Performance Budgeting System
Commonwealth of Virginia

Virginia Performs Home

Select Agencies

122: Department of Planning and Budget
140: Department of Criminal Justice Services
154: Department of Motor Vehicles
403: Department of Game and Inland Fisheries
501: Department of Transportation
601: Department of Health
602: Department of Medical Assistance Services
720: Department of Behavioral Health and Developmental Services
790: Grants to Localities
793: Intellectual Disabilities Training Centers
999: Department of Alcoholic Beverage Control

Filter the agencylist by selecting a secretary or group

Groups

Behavioral Health and Developmental Services
Community College System
Corrections
DPB: Budget Operations
DPB: Commerce and Resources
DPB: Education and Transportation
DPB: General Government
DPB: Health and Human Resources

Secretariats

Administration
Agriculture and Forestry
Central Appropriations
Commerce and Trade
Education
Executive Offices
Finance
General Fund Resources
General Provisions
Health and Human Resources
Independent Agencies
Judicial
Legislative
Natural Resources
Public Safety
State Grants to Nonstate Entities
Technology
Transportation

Submit

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Logged in as
DPB TestAccount

Step 2:

- After selecting your agency, you will be presented with a listing of current objectives and the option to create a new objective as demonstrated below.

Performance Budgeting System
Commonwealth of Virginia

Virginia Performs Home | PB Reports

Manage Objectives

Click on an objective to edit, Click a column header to resort, [Create a new Objective](#), or change the filter options and **Submit**

Objective Name	ID	Version
Develop a financially sound budget in which proposed recurring spending can be maintained by recurring revenue over time.	122	12271502.001
Develop timely and accurate forecasts for major state programs for planning and budgeting purposes.	122	12271505.002
Ensure that the state budget.	122	12271502.002
Ensure that federal resources are used efficiently and with applicable state and	122	12271598.001
Facilitate improvement of the efficiency and effectiveness of executive branch agency operations.	122	12271506.001
Facilitate ways for local school divisions to save money in non-instructional areas.	122	12271506.002
Provide accurate, timely analysis of the fiscal and related impacts of legislation.	122	12271504.001
Provide timely analysis of the economic impact of proposed regulations, with the objective of designing regulations in the most efficient, effective, and least intrusive manner.	122	12271505.001
Strive to maintain a high level of satisfaction from the Governor's Policy Office and the Cabinet regarding information and analysis provided to them by the Department of Planning and Budget (DPB).	122	12200000.002

Create New Objective

2014-16

Goal 122.G02

Click on the Objective to edit/link

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Objectives
Measures
User Info
Publish
Archive
Activity Log
Log Off

Logged in as
DPB TestAccount

Step 3:

- To edit or link a current objective, select the objective text as demonstrated in Step 2.
- To edit the objective name, description, or strategies click in the box and edit as desired.
- To add a strategy, click on the “add strategy” link.
- To link to an agency goal, select the “link to an Agency Goal” link.
- To link to a measure, select the “link to a Measure” link.
- You may also unlink established links to goals and measures by selecting “unlink” for the appropriate goal and/or measure.
- You can delete the entire objective, by selecting the “delete” button.
- Press Save.

The screenshot shows the 'Performance Budgeting System' interface for the Commonwealth of Virginia. The page title is 'Objective'. The agency is 'Department of Planning and Budget [122]' and the version is '2014-16'. The objective ID is '12271505.002'. The objective name is 'Develop timely and accurate forecasts for planning and budgeting purposes.' and the description is 'The Department of Planning and Budget produces annual forecasts for the following significant state programs which are provided to decision makers as key input for each year's budget decisions as Expenditures: Public Safety Admissions and Inmate Population; state juvenile correctional facilities, and Criminal Fund forecast.' The strategies listed are 'Assure forecast results are communicated effectively.', 'Maintain expertise on relevant forecasting techniques and models to maintain quality.', and 'Manage forecast production to optimize usefulness to decision makers.' There is an 'Add Strategy' button and a text input field for adding a new strategy. Below the strategies, there are links to 'Link to an Agency Goal' and 'Link to a Measure'. A table shows the measures linked to this objective, with one measure listed: '12271505.002.002' with the name 'Accuracy of the agency's forecast for total state response'. There are buttons for 'Unlink Measures' and 'unlink'.

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DPB TestAccount

Objective

Agency: Department of Planning and Budget [122]
Version: 2014-16
Objective ID: 12271505.002

Objective Name: Develop timely and accurate forecasts for planning and budgeting purposes. [Edit Objective Name] [Press Save] [Save] [Delete] [Delete Objective]

Description: The Department of Planning and Budget produces annual forecasts for the following significant state programs which are provided to decision makers as key input for each year's budget decisions as Expenditures: Public Safety Admissions and Inmate Population; state juvenile correctional facilities, and Criminal Fund forecast. [Edit Objective Description]

Strategies

Assure forecast results are communicated effectively. [Edit Strategies]
Maintain expertise on relevant forecasting techniques and models to maintain quality.
Manage forecast production to optimize usefulness to decision makers.

Add Strategy [Add Strategy] [Delete the text and save to delete a strategy]

Link to Agency Goal [Link to an Agency Goal]

Link to a Measure [Link to a Measure]

Agency Goals linked to this Objective for 2014-16

Measures linked to this Objective

Measure ID	Measure Name
12271505.002.002	Accuracy of the agency's forecast for total state response

Unlink Measures [unlink]

Step 4:

- To create a new objective, select the “create new objective” link as demonstrated in Step 2.
- Provide an objective name in the “objective name” text field as demonstrated below.
- Provide a description of the new objective in the “description” field.
- You can delete the new objective by selecting “delete.”
- Press Save! You must press “save” in order for you to be able to add a strategy and to link your new objective to goals and measures.

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DPB TestAccount

Objective

Agency
122: Department of Planning and Budget

Version: 2014.16

Objective ID: New

Objective Name

Add Objective
New Name

Save Delete

Description

Add Objective
Description Text Here

Delete New Objective

Step 5:

- To edit the new objectives name, description, or strategies click in the box and edit as desired.
- To add a strategy, click on the “add strategy” link.
- To link to an agency goal, select the “link to an Agency Goal” link.
- To link to a measure, select the “link to a Measure” link.
- You may also unlink established links to goals and measures by selecting “unlink” for the appropriate goal and/or measure.
- You can delete the entire objective, by selecting the “delete” button.
- Press Save.

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Objective

Agency: Department of Planning and Budget [122]

Version: 2014-16

Objective ID: 12271505.002

Press Save

Save Delete

Delete Objective

Objective Name

Develop timely and accurate forecasts for planning and budgeting purposes.

Edit Objective Name

Description

The Department of Planning and Budget produces annual forecasts for the following significant state programs which are provided to decision makers as key input for each year's budget decisions as planning for key budget drivers: Medicaid, Expenditures; Public Safety Admissions and Inmate Population; state juvenile correctional facilities, and detention homes; and Criminal Fund forecast.

Edit Objective Description

Strategies

Assure forecast results are communicated effectively.

Edit Strategies

Maintain expertise on relevant forecasting techniques and models to maintain quality.

Manage forecast production to optimize usefulness to decision makers.

Add Strategy

Link to Agency Goal

Link to an Agency Goal

Link to a Measure

Link to a Measure

Agency Goals linked to this Objective for 2014-16

Measures linked to this Objective

Measure ID	Measure Name	Unlink Measures	unlink
12271505.002.002	Accuracy of the agency's forecast for total state response	Unlink Measures	unlink

STRATEGIC PLANS: MEASURES & MEASURE ATTRIBUTES

Measures

Measures are meaningful indicators used to determine performance, a criterion or value used to determine the magnitude or degree of something, a tool used by management and members of the organization to determine the effect that strategies and activities are having on the accomplishment of accomplishment of objectives and goals.

Tips for writing good measure name:

- Clear; understandable to the general public as well as decision makers
- Focus on the most important thing the agency does
- Do not start with a verb
- Measure Structure:
 - **Data form**
 - *Object*
 - Criterion or modifier

Measure Structure Example: **Percentage** of *productivity measures* that are written in proper format.

Examples of measures:

- Violent crime rate
- Number of escapes from confinement
- Percentage of checks delivered within the designated 30 calendar day timeframe

Measure Class

There are three classes of measures: **Key, Productivity, and Other agency.**

Measure Types: Input, Output, Outcome

Measures occur in one of three different formats: input, output, or outcome.

Input measures describe the amount of resources used to conduct an activity, produce and output, or provide a service; a measure that describes the volume of incoming work to be processed; usually consists of a single numeric value; a type of workload measure.

Output measures describe the amount of work completed or output produced; usually consists of a single numeric value; a type of workload measure.

Outcome measures describe 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 of input, output and outcome measures:

- Input measures:
 - Number of hours used to analyze a new software package
 - Amount of money invested/spent
- Output measures:
 - Number of service calls closed
 - Number of customer calls handled
- Outcome measures:
 - Problem resolution rate
 - Customer satisfaction rate
 - Employee retention

Measure Frequency

Measurement can occur in different cycles: monthly, quarterly, annually, etc. Ensure you collect data for your measure frequency enough to identify problems quickly and enable course corrections.

Measure Frequencies:

- Semi-annual
- Quarterly
- Annually

Data Source and Calculation

Identifies the source of the measurement data that will be used and gives a description of how any calculations for the measure will work. It is beneficial to define terms used in the measure or in the mathematical formula used to calculate the measure and to make a note of what is included or excluded in the calculation.

Tips for writing data source and calculation:

- Be specific as possible
- Don't assume the reader will understand your "industry specific" terminology
- Show the formula being used

Example of data source:

- Customer survey completed as they complete their online transactions, administered by onlinesurvey.net.

Example of calculation:

- Calculate an average customer satisfaction rating for each survey question for all completed surveys submitted in a given calendar month.

Baseline

A baseline is a description or measure of the current state. It is the starting point from which an organization monitors progress. Each new measure established must have a baseline.

Tips for establishing a baseline:

- Include the actual data value
- Include the "as of" date
- Only required for new measures

Examples of baselines:

- 15 crimes in FY 2015 (Measure: Violent crime rate)
- 82 percent, 12/31/2016 (Measure: Employee turnover rate)
- 12 percent for FY 2009 (Measure: Customer satisfaction rating)

Target

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

For the 2014-2016 biennium the required Target Dates are as follows:

ShortTarget 2016: June 30, 2016

LongTarget 2018: June 30, 2018

Agencies are able, not required, to establish a User Defined Target specific to the measure/agency's needs (e.g., the federal government has a set target for a measure included in your agency strategic plan that does not match the required target dates). Targets should follow the tips and examples provided below.

Tips for establishing targets:

- Include the numeric value of the target
- Include the date by which the agency intends to achieve the target
- Short-term and long-term target dates are predetermined by the administrator
- Agencies can established one non-predetermined target/target date, if necessary, to correspond with federal/state/local, etc. requirements.
- Performance should not consistently exceed a target.
- Challenging, but realistic and achievable
- Check targets against national data from other states, where possible, avoid setting targets that fall below other states

Examples of targets:

- Three percent reduction by FY 2016 (Measure: Violent crime rate)
- Two percent reduction in FY 2015 and FY 2016 (Measure: Employee turnover rate)
- 89 percent by 12/31/17 (Measure: Customer satisfaction rating)

Preferred Trend

Preferred trend indicates the desired direction of change in the results reported for the measure.

Preferred trends:

- Maintain
- Increase
- Decrease

Year type

Year type is an element that helps to describe the timing of your measurement.

Year type:

- State Fiscal
- Federal Fiscal
- Calendar

Statistical Unit

The unit of measurement used to calculate your measure result.

Tips for statistical units:

- This is a narrative field that you should define.

Examples of statistical units:

- Dollars
- Inches
- Parts per million

Instructions for entering/editing your objectives can be found on the following page.

SYSTEM INSTRUCTIONS – MEASURES

NOTE: Users have two options for accessing their measures. You can access them through the filter navigation or by utilizing the measures button on the left side of the screen. The system instructions below detail both options for accessing measures; however, it is recommended that if you want to access your measures only to use the measures button on the left side of the screen.

Note: System instructions for entering measure results will be in a separate table.

Filter navigation

When you select measures using the filter navigation agency goals and objectives will automatically be selected as demonstrated below.

Step 1:

- Upon entering the Agency Goal Tab you will be presented with the following.
- Click on the “Measures” associated with the goal and objective, to edit the measure.

Please note: For display purposes the Measures editing screen instructions are separated into steps 2-6

Step 2:

- After clicking on the measure you will be presented with the “Measure” editing screen.
- To edit the “Measure Name,” click in the associated text box and edit your text as necessary.
- To adjust the “Measure Class,” “Frequency,” “Measure Type,” “Preferred Trend,” and “Year Type” use the associated drop down menu.
- To edit the “Statistical Unit,” click in the associated text box and edit your text as necessary.
- To edit the “Data Source and Calculation,” click in the associated text box and edit your text as necessary.
- To retire/deactivate a measure you do not want to continue reporting on, click on the “Retire” button.
- Press Save.

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Measure

Agency: Department of Planning and Budget [122]

Measure ID: 1

Measure Name: survey res

Measure Class: Key

Freq: Annually

Measure Type: Outcome

Preferred Trend: Stable

Year Type: State Fiscal

Statistical Unit: Average rating

Data Source and Calculation: vey of the Governor, Governor's policy staff, and the Governor's Cabinet. Calculation: Sum of ratings number of ratings.</p>

DPB TestAccount

Step 3:

- Following “Data Source and Calculation,” you have the opportunity to link or unlink an objective to the measure as demonstrated in the screen shot below.
- To unlink an objective to the measure, click the “unlink” button on the right of the grid. Be sure that you are in the correct plan version.
- To link an objective to the measure, click the “link to an objective” button and you will be directed to a listing of all objectives. You select the appropriate objective by clicking on the blue objective id as demonstrated in the second screen shot below.
- Please note: If you click on the blue “Objective ID” you will be directed to the objective editing screen.
- Press Save.

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Measure

Agency: Department of Planning and Budget [122] Measure ID: 12200000.002.001

Measure Name: Average rate of survey respondents' satisfaction with the timeliness and quality of the agency's services

Press Save Save Retire

Measure Class: Key Frequency: Annually Measure Type: Outcome Preferred Trend: Stable Year Type: State Fiscal Statistical Unit: Average rating

Data Source and Calculation: <p>Annual survey of the Governor, Governor's policy staff, and the Governor's Cabinet. Calculation: Sum of ratings divided by the number of ratings.</p>

Click the Objective ID to edit an Objective

Link to an Objective

Select Plan Version

Objective ID	Objective Name	Version
12200000.002	Strive to maintain a high level of satisfaction from the Governor's Policy Office regarding information and analysis provided to them by the Department of Planning and Budget (DPB).	2014-16 unlink

Unlink Objective

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Objectives

Click on one of the Objectives to create a link

122.0001	test
12200000.002	Strive to maintain a high level of satisfaction from the Governor's Policy Office and the Cabinet regarding information and analysis provided to them by the Department of Planning and Budget (DPB).
12271502.001	Identify areas in which proposed recurring spending can be reduced over time.
12271502.002	Ensure accurate actions in executing the state budget.
12271504.001	Provide accurate, timely analysis of the fiscal and related impacts of legislation.
12271505.001	Provide timely analysis of the economic impact of proposed regulations, with the objective of designing regulations in the most efficient, effective, and least intrusive manner.
12271505.002	Develop timely and accurate forecasts for major state programs for planning and budgeting purposes.
12271506.001	Facilitate improvement of the efficiency and effectiveness of executive branch agency operations.
12271506.002	Facilitate ways for local school divisions to save money in non-instructional areas.
12271508.001	Ensure that administrative resources are used efficiently and effectively and in a manner that supports the state's mission.

Click to select an Objective

Save Retire

Statistical Unit: Average rating

Link to an Objective for Version: 2014-16

Version
2014-16 unlink

Step 4:

- Following linking your measure to objectives, you have the opportunity to select the service areas affected by this measure as demonstrated in the first screen shot below.
- To add/select a new service area for this measure, click the blue "Add" button and you will be directed to a listing of your agency's service areas. Click the "Name" of the service area you would like to include as demonstrated in the second screen shot below.
- To delete a service area for this measure, click the red "X" button.
- Press Save.

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Objectives linked to this measure [Link to an Objective](#) for Version 2014-16

Objective ID	Objective Name	Version
12200000.002	Strive to maintain a high level of satisfaction from the Governor's Policy Office and the Cabinet regarding information and analysis provided to them by the Department of Planning and Budget (DPB).	2014-16 unlink

Service Areas affected by this measure [Add](#)

Code	Name	
71505	Forecasting and Regulatory Review Services	Delete a Service Area

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Select from this list of valid Service Areas pulled from the PB System

Code	Name
71301	Savings from Management Actions
71502	Budget Development and Budget Execution Service
71504	Legislation and Executive Order Review Service
71505	Forecasting and Regulatory Review Services
71506	Program Evaluation Services
71598	Administrative Services

Click the Name of the Service Area you would like to include

00.002.001

Retire

Step 5:

- After selecting your service areas, you have the opportunity to select the Enterprise Strategy you measure impacts, if applicable as demonstrated in the first screen shot below. Please note: Not all measures will have a direct impact on an Enterprise Strategy.
- To add/select an "Enterprise Strategy" for this measure, click the blue "Add" button and you will be directed to a listing of Enterprise Priorities. First, click the "Enterprise Priority" impacted by your measure. Second, click the "+" to expand the listing to see all of the "Enterprise Strategies" associated with the "Enterprise Priority." Finally, select the "Enterprise Strategy" that you would like to select as demonstrated in the second screen shot below.
- To delete a service area for this measure, click the red "X" button.
- Press Save.

Objectives linked to this measure [Link to an Objective](#) for Version 2014-16

Objective ID	Objective Name	Version
12200000.002	Strive to maintain a high level of satisfaction from the Governor's Policy Office and the Cabinet regarding information and analysis provided to them by the Department of Planning and Budget (DPB).	2014-16 unlink

Service Areas affected by this measure [Add](#)

Code	Name	
71506	Program Evaluation Services	Add an Enterprise Strategy
71301	Savings from Management Actions	Delete a Service Area
71505	Forecasting and Regulatory Review Services	Delete a Service Area

Enterprise Strategies impacted by this measure [Add](#)

Name	
Enhance the productivity and efficiency of state government operations.	Delete an Enterprise Strategy

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Expand the list of Enterprise Priorities and select one of the Strategies

Ensure the long-term financial security of the Commonwealth by promoting effective and efficient financial management, planning, and budgeting.

- Go beyond federal health reform and recommend other innovative health care solutions to provide access to appropriate and affordable health care in an economically responsible manner. Ensure that meaningful reform, including Medicaid reform, is achieved throughout the Commonwealth through approaches that every system, while reducing costs and improving quality.
- Designing a system of individualized services and community-based services and family connections for children in foster care or at risk of coming
- Improve educational success for Virginia's kindergarten through 12th grade school population.
- Improve operations to ensure delivery of government services in the most efficient and effective manner.

Click to expand the list of Enterprise Priorities

Enterprise Strategies

- 109 Continue the long-term process of creating a reliable and efficient citizen-centric environment for doing business with and getting information from the Commonwealth.
- 110 d computer IT infrastructure in a mutually successful partnership.
- 111 management of information technology.
- 103 state government operations.
- 108 Enhance the voter registration process.
- 101 Ensure the long-term viability of the Health Insurance Trust Fund by stabilizing the contributions and employing best practice approaches to manage the long-term cost structure of the fund.
- 105 Increase the use of small agencies receiving services from a shared service provider for functions such as

Select the Enterprise Strategy that impacts your Measure

00.002.001
Retire
014-16
version
014-16 [unlink](#)

Step 6:

- To add your **Baseline** (only for new measures), click in the appropriate cell to add the baseline "date," "value," and if necessary "note."
- To add your Target values, click in the appropriate cell to add the **Short Target 2016** and **Long Target 2018** "date," "value," and if necessary "note."
- Please note: the date for your **Short Target 2016** is "June 30, 2016" and the date for your **Long Target 2018** is "June 30, 2016." You are responsible for keying in these dates.
- To create a User Defined target, key the target name and corresponding attributes outlined in the steps above.

Enterprise Strategies impacted by this measure [Add](#)

Name

Any necessary Notes

Measure Targets and Baseline

	Date	Baseline Date	Value	Baseline Value	Note
Baseline					
Short Target 2016		Target Date			
Long Target 2018			Target Value		
User Defined Target Name		User Defined Target Date		User Defined Target Value	

Measure Results
[Insert Row](#) [Delete Row](#)


Measure Button Navigation

When you select measures using the measure button navigation on the left side of the screen you will be prompted with the following filter, to select the agency in which you are working on measures.


The screenshot displays the 'Performance Budgeting System' for the 'Commonwealth of Virginia'. The interface includes a sidebar on the left with navigation links: Strategic Plan, EPR, Objectives, Measures, User Info, Publish, Archive, Activity Log, and Log Off. Below these links, it shows 'Logged in as DPB TestAccount'. The main content area is titled 'Select Agencies' and contains a list of agencies with their IDs: 122: Department of Planning and Budget, 140: Department of Criminal Justice Services, 154: Department of Motor Vehicles, 403: Department of Game and Inland Fisheries, 501: Department of Transportation, 601: Department of Health, 602: Department of Medical Assistance Services, 720: Department of Behavioral Health and Developmental Services, 790: Grants to Localities, 793: Intellectual Disabilities Training Centers, and 999: Department of Alcoholic Beverage Control. To the right of the agency list is a filter panel titled 'Filter the agencylist by selecting a secretary or group'. It contains two sections: 'Groups' and 'Secretariats'. The 'Groups' section lists: Behavioral Health and Developmental Services, Community College System, Corrections, DPB: Budget Operations, DPB: Commerce and Resources, DPB: Education and Transportation, DPB: General Government, and DPB: Health and Human Resources. The 'Secretariats' section lists: Administration, Agriculture and Forestry, Central Appropriations, Commerce and Trade, Education, Executive Offices, Finance, General Fund Resources, General Provisions, Health and Human Resources, Independent Agencies, Judicial, Legislative, Natural Resources, Public Safety, State Grants to Nonstate Entities, Technology, and Transportation. At the bottom of the main content area, there are two buttons: 'Submit' and 'Press Submit'.

Step 1:

- After selecting your agency you will be presented with a listing of your agency's measures as demonstrated in the screen shot below.
- You have the option to edit a measure or to create a new measure from this screen.



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Measures

Click on a measure name to edit a measure, Click a column header to resort, [Create a new Measure](#), or change the filter options and [Submit](#)

Measure Name	Measure Class	Frequency	Measure ID	Status
<input type="text"/> <div>Click here to create a New Measure</div>				Active
Accuracy of the agency's forecast for total state responsible inmate population.			12271505.002.002	Active
Administratively approved appropriations as a percentage of legislative appropriations.	122	Annually	12271502.002.002	Active
Average rate of survey respondents' satisfaction with the timeliness and quality of the agency's analyses.	122	Annually	12200000.002.001	Active
Average satisfaction rating of the Governor's po and timeliness of the impact analyses.		Annually	12271504.001.003	Active
Percent of accounts payable transactions that p Commonwealth Accounting and Reporting System (CARS)		Annually	M122SA12001	Active
Percent of evaluation study recommendations accepted.	122	Annually	12271506.001.001	Active
Percent of school efficiency recommendations implemented.	122	Annually	12271506.002.001	Active
Percentage of all versions of bills assigned to the agency (excluding those marked "no review") for which fiscal impact statements were issued.	122	Annually	12271504.001.001	Active
Percentage of economic impact analyses that are completed within 45 days from receipt of proposed and fast-track (stage) regulatory proposals.	122	Annually	12271505.001.001	Active
Ratio of recurring general fund revenue to recurring general fund spending.	122	Annually	12271502.001.001	Active

Click on the Measure Name to edit a Measure

Please note: For display purposes the Measures editing screen instructions are separated into steps 2-6

Step 2:

- After clicking on the measure you will be presented with the "Measure" editing screen.
- To edit the "Measure Name," click in the associated text box and edit your text as necessary.
- To adjust the "Measure Class," "Frequency," "Measure Type," "Preferred Trend," and "Year Type" use the associated drop down menu.
- To edit the "Statistical Unit," click in the associated text box and edit your text as necessary.
- To edit the "Data Source and Calculation," click in the associated text box and edit your text as necessary.
- To retire/deactivate a measure you do not want to continue reporting on, click on the "Retire" button.
- Press Save.

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Measure

Agency: Department of Planning and Budget [122]

Measure ID: 12200000.002.001

Measure Name: survey res

Measure Class: Key

Frequency: Annually

Measure Type: Outcome

Preferred Trend: Stable

Year Type: State Fiscal

Statistical Unit: Average rating

Data Source and Calculation: vey of the Governor, Governor's policy staff, and the Governor's Cabinet. Calculation: Sum of ratings number of ratings.</p>

Buttons: Edit Measure Name, Use Drop Downs to Make Selections, Press Save, Save, Retire, Edit Statistical Unit

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Step 3:

- Following “Data Source and Calculation,” you have the opportunity to link or unlink an objective to the measure as demonstrated in the screen shot below.
- To unlink an objective to the measure, click the “unlink” button on the right of the grid. Be sure that you are in the correct plan version.
- To link an objective to the measure, click the “link to an objective” button and you will be directed to a listing of all objectives. You select the appropriate objective by clicking on the blue objective id as demonstrated in the second screen shot below.
- Please note: If you click on the blue “Objective ID” you will be directed to the objective editing screen.
- Press Save.

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Measure

Agency: Department of Planning and Budget [122]

Measure ID: 12200000.002.001

Measure Name: Average rate of survey respondents' satisfaction with the timeliness and quality of the agency's services

Measure Class: Key

Frequency: Annually

Measure Type: Outcome

Preferred Trend: Stable

Year Type: State Fiscal

Statistical Unit: Average rating

Data Source and Calculation: <p>Annual survey of the Governor, Governor's policy staff, and the Governor's Cabinet. Calculation: Sum of ratings divided by the number of ratings.</p>

Buttons: Press Save, Save, Retire, Select Plan Version, Link to an Objective, Unlink Objective

Objective ID	Objective Name	Version
12200000.002	Strive to maintain a high level of satisfaction from the Governor's Policy Cabinet regarding information and analysis provided to them by the Department of Planning and Budget (DPB).	2014-16 unlink

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Objectives

Click on one of the Objectives to create a link

122.0001	test
12200000.002	Strive to maintain a high level of satisfaction from the Governor's Policy Office and the Cabinet regarding information and analysis provided to them by the Department of Planning and Budget (DPB).
12271502.001	Ensure that proposed recurring spending can be sustained over time.
12271502.002	Ensure accurate actions in executing the state budget.
12271504.001	Provide accurate, timely analysis of the fiscal and related impacts of legislation.
12271505.001	Provide timely analysis of the economic impact of proposed regulations, with the objective of designing regulations in the most efficient, effective, and least intrusive manner.
12271505.002	Develop timely and accurate forecasts for major state programs for planning and budgeting purposes.
12271506.001	Facilitate improvement of the efficiency and effectiveness of executive branch agency operations.
12271506.002	Facilitate ways for local school divisions to save money in non-instructional areas.
12271598.001	Ensure that administrative resources are used efficiently and effectively and in a

Click to select an Objective

Measure ID: 12200000.002.001

Save Retire

Statistical Unit
Average rating

Active for Version 2014-16

Version
2014-16 unlink

Step 4:

- Following linking your measure to objectives, you have the opportunity to select the service areas affected by this measure as demonstrated in the first screen shot below.
- To add/select a new service area for this measure, click the blue "Add" button and you will be directed to a listing of your agency's service areas. Click the "Name" of the service area you would like to include as demonstrated in the second screen shot below.
- To delete a service area for this measure, click the red "X" button.
- Press Save.

DPB Test Account

Objectives linked to this measure

Link to an Objective for Version 2014-16

Objective ID	Objective	Version
12200000.002	Strive to maintain a high level of satisfaction from the Governor's Policy Office and the Cabinet regarding information and analysis provided to them by the Department of Planning and Budget.	2014-16 unlink

Add a Service Area

Service Areas affected by this measure [Add](#)

Code	Name
71505	Forecasting and Regulatory Review Services

Delete a Service Area

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Select from this list of valid Service Areas pulled from the PB System

Code	Name
71301	Savings from Management Actions
71502	Budget Development and Budget Execution Services
71504	Legislation and Executive Order Review Service
71505	Forecasting and Regulatory Review Services
71506	Program Evaluation Services
71598	Administrative Services

Click the Name of the Service Area you would like to include

00.002.001

Retire

X

Step 5:

- After selecting your service areas, you have the opportunity to select the Enterprise Strategy you measure impacts, if applicable as demonstrated in the first screen shot below. Please note: Not all measures will have a direct impact on an Enterprise Strategy.
- To add/select an "Enterprise Strategy" for this measure, click the blue "Add" button and you will be directed to a listing of Enterprise Priorities. First, click the "Enterprise Priority" impacted by your measure. Second, click the "+" to expand the listing to see all of the "Enterprise Strategies" associated with the "Enterprise Priority." Finally, select the "Enterprise Strategy" that you would like to select as demonstrated in the second screen shot below.
- To delete a service area for this measure, click the red "X" button.
- Press Save.

Objectives linked to this measure [Link to an Objective](#) for Version 2014-16

Objective ID	Objective Name	Version
12200000.002	Strive to maintain a high level of satisfaction from the Governor's Policy Office and the Cabinet regarding information and analysis provided to them by the Department of Planning and Budget (DPB).	2014-16 unlink

Service Areas affected by this measure [Add](#)

Code	Name	
71506	Program Evaluation Services	X
71301	Savings from Management Actions	X
71505	Forecasting and Regulatory Review Services	X

Add an Enterprise Strategy

Enterprise Strategies impacted by this measure [Add](#)

Name	
Enhance the productivity and efficiency of state government operations.	X

Delete an Enterprise Strategy

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Expand the list of Enterprise Priorities and select one of the Strategies

Ensure the long-term financial security of the Commonwealth by promoting effective and efficient financial management, planning, and budgeting.

- Go beyond federal health reform and recommend other innovative health care solutions to provide access to appropriate and affordable health care in an economically responsible manner. Ensure that meaningful reform, including Medicaid reform, is achieved throughout the Commonwealth through approaches that every system, while reducing costs and improving quality.
- Designing a system of individualized services and community-based services and family connections for children in foster care or at risk of coming
- Improve educational success for Virginia's kindergarten through 12th grade school population.
- Improve operations to ensure delivery of government services in the most efficient and effective manner.

Click to expand the list of Enterprise Priorities

Enterprise Strategies

- 109 Continue the long-term process of creating a reliable and efficient citizen-centric environment for doing business with and getting information from the Commonwealth.
- 110 d computer IT infrastructure in a mutually successful partnership.
- 111 management of information technology.
- 103 state government operations.
- 108 Enhance the voter registration process.
- 101 Ensure the long-term viability of the Health Insurance Trust Fund by stabilizing the contributions and employing best practice approaches to manage the long-term cost structure of the fund.
- 105 Increase the use of small agencies receiving services from a shared service provider for functions such as

Select the Enterprise Strategy that impacts your Measure

00.002.001
Retire
014-16
ersion
014-16 [unlink](#)

Step 6:

- To add your **Baseline** (only for new measures), click in the appropriate cell to add the baseline "date," "value," and if necessary "note."
- To add your Target values, click in the appropriate cell to add the **Short Target 2016** and **Long Target 2018** "date," "value," and if necessary "note."
- Please note: the date for your **Short Target 2016** is "June 30, 2016" and the date for your **Long Target 2018** is "June 30, 2016." You are responsible for keying in these dates.
- To create a User Defined target, key the target name and corresponding attributes outlined in the steps above.

Enterprise Strategies impacted by this measure [Add](#)

Name

Any necessary Notes

Measure Targets and Baseline

	Date	Baseline Date	Value	Baseline Value	Note
Baseline					
Short Target 2016		Target Date			
Long Target 2018			Target Value		
User Defined Target Name		User Defined Target Date		User Defined Target Value	

Measure Results
[Insert Row](#) [Delete Row](#)

Step 7:

- To create a new measure, click on the “Create a new Measure” link.
- Once clicking on the “Create a new Measure” link you will be provided the measure entry screen as demonstrated below.
- Complete all the fields as indicated, reference Step 2 of these Measure system instructions for detailed assistance on completing these fields.
- Press Save.

The screenshot shows the 'Measure' entry screen in the Performance Budgeting System. The header includes the system name and 'Commonwealth of Virginia'. A left sidebar contains navigation links: Strategic Plan, EPR, Objectives, Measures, User Info, Publish, Archive, Activity Log, and Log Off. The main form area is titled 'Measure' and includes a search bar. The 'Agency' dropdown is set to '122: Department of Planning and Budget'. The 'Measure Name' field is empty. A 'Press Save' button with an arrow points to a 'Save' button. Below these are dropdowns for 'Measure Class' (Key), 'Frequency' (Quarterly), 'Measure Type' (Output), 'Preferred Trend' (Increase), and 'Year Type' (State Fiscal). The 'Statistical Unit' field is empty. A 'Data Source and Calculation' text area is at the bottom. A status bar at the bottom left says 'Logged in as DPB TestAccount'. A note at the bottom states: 'Measure Baselines, Targets, Results and other measure information will show up after you have saved once and this measure has been created.'

Step 8:

- After saving, you will be prompted to provide the following: “Objectives linked to this measure,” “Service Areas affected by this measure,” “Enterprise Strategies impacted by this measure,” and “Measure Targets and Baselines.” Please reference Steps 3-6 of these Measure system instructions for detailed assistance on completing these fields.
- Press Save.

STRATEGIC PLANS: MEASURE RESULTS REPORTING

Measure Reporting

Measure result data should be reported on a timely basis in accordance to the measure frequency (annual, bi-annual, or quarterly). Any anomalies with the data should be described with an explanatory note.

Tips for reporting measure data:

- Data should be reported on a timely basis.
- If numbers are preliminary, an explanatory note should be used to explain such.
- Explanatory notes should be used to explain any anomalies or discrepancies in the data.
- Avoid use of jargon or acronyms in explanatory notes.
- It is not appropriate to change measures/measure attributes during measure reporting periods. However, editing a measure to correct a typo or a minor tweak is permitted, but must be approved by your DPB budget analyst.

Please note: Agencies are now responsible for publishing measure results data using the PB based strategic planning system. System instructions are provided on the following page.

SYSTEM INSTRUCTIONS – MEASURE RESULTS

Step 1:

- To report measure results data, access the **Measures** tab either through the **measure button navigation** or the **filter navigation** as described in System Instruction – Measures.
- You will be presented with a listing of your agency's measures as demonstrated in the first screen shot below.
- Select the measure you would like to report measure results for and you will be taken to the "Measure" screen.
- Scroll to the "Measure Results" and you will be presented with a "Measure Results" grid with your historical and current measure results data and prior Explanatory Notes as demonstrated in the second screen shot below.
- To add a new historical row to the "Measure Results" grid, click the "Insert Row" at the top of the grid and a new row will be added to the top of the "Measure Results" grid.
- To delete a historical row from the "Measure Results" grid, click the "Delete Row" and the most historical year will be deleted from the "Measure Results" grid.
- To add an "Explanatory Note" to the "Measure Results" grid, click in the corresponding grid and provide your note.
- Press Save. Save is located at the top to the "Measures" screen.

Performance Budgeting System
Commonwealth of Virginia

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Measures

Click on a measure name to edit a measure, Click a column header to resort, [Create a new Measure](#), or change the filter options and [Submit](#)

Measure Name	Agy	Frequency	Measure ID	Status
Accuracy of the agency's forecast for total state responsible inmate population.	122	Annually	12271505.002.002	Active
Administratively approved appropriations as a percentage of legislative appropriations.			12271502.002.002	Active
Average rate of survey respondents' satisfaction with the timeliness and quality of the agency's analyses.			12200000.002.001	Active
Average satisfaction rating of the Governor's policy staff with the quality and timeliness of the impact analyses.	122	Annually	12271504.001.003	Active
Percent of accounts payable transactions that post correctly to the Commonwealth Accounting and Reporting System (CARS)	122	Annually	M122SA12001	Active
Percent of evaluation study recommendations accepted.	122	Annually	12271506.001.001	Active
Percent of school efficiency recommendations implemented.	122	Annually	12271506.002.001	Active
Percentage of all versions of bills assigned to the agency (excluding those marked "no review") for which fiscal impact statements were issued.	122	Annually	12271504.001.001	Active
Percentage of economic impact analyses that are completed within 45 days from receipt of proposed and fast-track (stage) regulatory proposals.	122	Annually	12271505.001.001	Active
Ratio of recurring general fund revenue to recurring general fund spending.	122	Annually	12271502.001.001	Active
test	122	Quarterly	122.0001	Active

logged in as
DPB Test Account

Measure Results

Insert Row

Delete Row

Delete Historical Year

Insert Historical Year

Year	Result	Explanatory Note	
2006	10.21	The desire is to put as much as possible in the enacted budget and reduce administrative transactions.	⌵
2007	2.36	Therefore, DPB will strive to lower the percent of administrative transactions relative to the amount included in the Appropriation Act. For FY 2011, unanticipated federal grants received by Virginia, nonappropriated fund revenues, and nonappropriated fund distributions of settlement funds in	⬆
2008	3.76	Test Note	⬆
2009	3.45	The desire is to put as much as possible in the enacted budget and reduce administrative transactions. Therefore, DPB will strive to lower the percent of administrative transactions relative to the amount included in the Appropriation Act. For FY 2011, unanticipated federal	⬆
2010	4.31	The desire is to put as much as possible in the enacted budget and reduce administrative transactions. Therefore, DPB will strive to lower the percent of administrative transactions relative to the amount included in the Appropriation Act. For FY 2011, unanticipated federal	⬆
2011	Key in Explanatory Note Here	Another note	⬆
2012	6.45	The desire is to put as much as possible in the enacted budget and reduce administrative transactions. Therefore, DPB will strive to lower the percent of administrative transactions relative to the amount included in the Appropriation Act.	⬆
2013	4.50	Type your Explanatory Note here...	⬆
2014	Key in Measure Result Here		⬆

Press Save at the Top of this Tab!

STRATEGIC PLANS: SUPPORTING DOCUMENTS

Organizational charts and memorandums of understanding (MOU's) are some common documents that help illustrate an agency's mission or organizational dynamic. It is recommended that you upload these to your agency plan.

Instructions for adding supporting documentation can be found on the following page.

SYSTEM INSTRUCTIONS – SUPPORTING DOCUMENTS

Step 1:

- To add a document or link as a supporting document, choose the “supporting documents” field from the filter as demonstrated below.
- Press Submit.

The screenshot shows the 'Performance Budgeting System' interface for the '2014-16 Strategic Plan'. The left sidebar contains navigation links: Strategic Plan, EPR, Objectives, Measures, User Info, Publish, Archive, Activity Log, and Log Off. The main content area is titled '2014-16 Strategic Plan' and includes a 'Strategic Plan Filter' section. This filter has dropdowns for 'Agency' (122: Department of Planning and Budget) and 'Plan Version' (2014-16). Below these are checkboxes for 'Agency Plan' elements: Mission and Vision, Values, Information Technology, Partners, Agency Goals, and Objectives. A 'Select Supporting Documents' button with an arrow points to the 'Supporting Documents' section. This section has checkboxes for Description, Mission Alignment, Products and Services, Finance, and Supporting Documents. On the right, there is a list of supporting documents with 'delete' buttons next to each. At the bottom, there is a 'Submit' button and a 'Press Submit' button with an arrow pointing to it. A 'Show Audit Information' checkbox is also present.

Step 2:

- On the “Supporting Documents” screen you provided a listing of any of your previous supporting documents or links as demonstrated in the first screen shot below.
- To delete a supporting document or link, select the blue “delete” button next to the document you wish to delete.
- To attach a new file/document to your strategic plan, select the “attach file” link at the bottom of the grid and you will be directed to the “Attach” screen as demonstrated in the second screen shot below. Provide a “Title or Short Description” for the file you are attaching. Then “Browse” to where the file is stored on your PC/Network and select. Once the file path is in the “Browse” field, Press “Attach.”
- To attach a link to your strategic plan, select the “Create a Link” link at the bottom of the grid and you will be directed to the “Attach” screen as demonstrated in the third screen shot below. Provide a “Title or Short Description” for the link you are attaching. Then key the address to where the link is located. Once the link address is in the “Link” field, Press “Attach.”

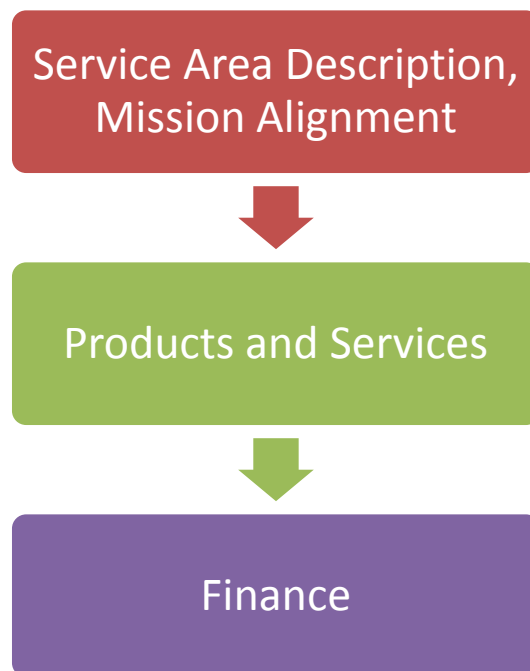
PROGRAM/SERVICE AREA PLANS

PROGRAM/SERVICE AREA PLANS: DESCRIPTION, MISSION ALIGNMENT

Service area plans are management tools that detail what a specific service area is planning to achieve. Service area plans assist management by helping to identify what products and services are supplied to customers and how they align with mandates or the strategic direction of the organization and by identifying current and future resource levels such as funding.

Program plans are allowable for administrative functions only. A program plan is essentially a “roll-up” of service areas to the program area used for budgeting purposes.

The following depicts the overall structure of the program/service area plan:



Program/Service Area Description

A detailed description of the service area provides the reader with an overview of the purpose of the service area.

Tips for writing program/service area description:

- Narrative, not bulleted list
- Should describe what the program/service area does, its purpose
- Highlight products and services
- Avoid the use of jargon and acronyms

Mission Alignment

A description of how the service area supports the mission of the agency.

Tips for writing mission alignment:

- Narrative, not bulleted list
- Should describe how the program/service area does directly impacts the mission of the agency
- It's ok to reference Code sections
- Avoid the use of jargon and acronyms

Instructions for adding description and mission alignment can be found on the following page.

SYSTEM INSTRUCTIONS – PROGRAM/SERVICE AREA PLANS DESCRIPTION & MISSION ALIGNMENT

Step 1:

- To access the **Program/Service Area** you wish to work on, use the Strategic Plan filter and select the service area name as demonstrated below.
- To access the “Description” and “Mission Alignment” select appropriate check box as demonstrated below.
- Press Submit.

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2014-16 Strategic Plan

Strategic Plan Filter
Select the strategic planning elements that you would like to work on

Agency: 122: Department of Planning and Budget

Plan Version: 2014-16

Program / Service Area Plans

- ☐ Mission and Vision
- ☐ Partners
- ☐ Information Technology
- ☐ Finance
- ☐ Customers
- ☐ Measures
- ☐ Supporting Documents

71502: Budget Development and Budget Execution Services


- ☒ Description
- ☒ Mission Alignment
- ☐ Products and Services
- ☐ Finance
- ☐ Supporting Documents

Submit

☐ Show Audit Information

Step 2:

- After selecting the “Program/Service Area” and its accompanying “Description” and “Mission Alignment” you will be presented with the following screen.


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Search

Strategic Plan
[EPR](#)
[Objectives](#)
[Measures](#)
[User Info](#)
[Publish](#)
[Archive](#)
[Activity Log](#)
[Log Off](#)

2014-16 Strategic Plan
Department of Planning and Budget [122]

[open filter](#)

Service Area Plan

Budget Development and Budget Execution Services [71502]

Description of this Program / Service Area
This service area consists of two components – budget development and budget execution. The two work in tandem to produce Virginia's biennial budget and subsequent amended budgets. Each one is described below and is mandated by Section 2.2-1501 of the Code of Virginia. Both components include operating and capital budgets.

Budget development is a methodical process used to create the Governor's executive budget. In general, it begins in the spring with the preparation of budget instructions for state agencies. This initial phase is followed by a second in September or October whereby funding requests for new initiatives are submitted by state agencies to the Department of Planning and Budget (DPB) for analysis and evaluation. This phase also requires DPB staff to make forecasts of major budget drivers. Both phases are essential for making recommendations to the Governor on funding issues and levels. They lead to the production of the budget document, budget bill, budget press package, and any subsequent executive amendments, if necessary. Thereafter, budget development is directed toward analyzing the General Assembly's committee and conference amendments. This effort assists the Governor in taking actions for the reconvened General Assembly session (amendments and item vetoes) and actions on the re-enrolled budget bill. Budget development concludes in late April or early May upon signing of the budget by the Governor.

Budget execution is the implementation component of Virginia's budget process that allows state agencies to spend appropriations. Within this component, appropriations and allotments are reviewed and approved, expenditures are monitored, and instructional guidance is issued to state agencies on matters such as year-end close and new-year start-up. Budget execution also includes the preparation of decision briefs that are used in making certain budgetary decisions. Although much of budget execution follows budget development, it is a year-round activity.

For the 2012-14 biennium, 36.35 positions would support this service area.

Mission Alignment Authority
The two phases of budget development are essential for making recommendations to the Governor on funding issues and position levels that support DPB's mission of advising the Governor on how to wisely use public resources for the benefit of all Virginians.

Budget execution includes the preparation of decision briefs that are used in making certain budgetary decisions, which also supports DPB's mission of advising the Governor on how to wisely use public resources for the benefit of all Virginians.

Step 3:

- To edit the “Description of this Program/Service Area” or “Mission Alignment” click on the text provided and you will be prompted with a text editing box as demonstrated below.
- Edit your text as necessary. You have some limited formatting capabilities in the top tool bar.
- Press Save!

SERVICE AREA PLANS: PRODUCTS AND SERVICES

Products and Services

A product is an item produced by the agency. A service is an action an agency takes to fulfill its mission. Agencies often have many products and services that span the operation of the organization, and even multiple agencies. These products and services impact individuals, groups of individuals, organizations, or organizational units, both internal and external.

Examples of products and services:

- Preparation of the executive budget document
- Research and development
- Drug testing
- Driver's license renewal
- Help desk services
- Program evaluation
- Volunteer recruitment and training

Description of Major Products and Services

Items or assistance an organization provides its customers as of the date of the new strategic plan.

Tips for writing description of major products and services:

- Can be in list format
- Should stand-alone
- Can be short sentences

Anticipated Changes to Products and Services

Any forecasted or predicted change to your products and services.

Examples of anticipated changes to products and services:

- The federal government's restructuring of TANF program is anticipated to increase the services offered, such as employment services that prepare individuals for the workplace.

- The anticipated changes to foster care services will require an increase in the interaction with children requiring or currently in foster care. It is anticipated that this will increase the existing caseloads by 33 percent.

Tips for writing anticipated changes to products and services:

- Should be short sentences
- Should clearly identify the products/services it is addressing
- Should clearly articulate the factors causing the anticipated change.

Factors Impacting Products and Services

Any internal or external influences that may impact your products and services for the biennium.

Examples of factors impacting products and services:

- The implementation of the Child and Family Service Review for foster care will impact the delivery of foster care services.
- The federal government undertaking a review of the Temporary Assistance to Needy Families program.

Tips for writing factors impacting products and services:

- Should be short sentences
- Should clearly identify the products/services it is addressing

Instructions for adding products and services can be found on the following page.

SYSTEM INSTRUCTIONS – PROGRAM/SERVICE AREA PLANS PRODUCTS AND SERVICES

Step 1:

- To select the “Products and Services” for the **Program/Service Area Plan** you would like to edit, select the appropriate check box using the **Strategic Plan Filter** as demonstrated below.
- Press Submit.

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Search

2014-16 Strategic Plan [open filter](#)

Strategic Plan Filter
Select the strategic planning elements that you would like to work on:

Agency: 122: Department of Planning and Budget Plan Version: 2014-16

Agency Plan X ✓

☐ Mission and Vision ☐ Values ☐ Information Technology ☐ Finance ☐ Customers

☐ Partners ☐ Agency Goals ☐ Objectives ☐ Measures ☐ Supporting Documents

Program / Service Area Plans X ✓

71502: Budget Development and Budget Execution Services
71504: Legislation and Executive Order Review Service
71505: Forecasting and Regulatory Review Services
71506: Program Evaluation Services
71598: Administrative Services


☐ Description
☐ Mission Alignment
☒ Products and Services
☐ Finance
☐ Supporting Documents

Check to select Products and Services


Submit **Press Submit**

Step 2:

- After selecting the “Products and Services” you will be presented with the following screen which consists of the three fields related to **Products and Services**: “Description of Products and Services,” “Anticipated Changes,” and “Factors Impacting.”



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Search

Strategic Plan
EPR
Objectives
Measures
User Info
Publish
Archive
Activity Log
Log Off

2014-16 Strategic Plan
Department of Planning and Budget [122]

open filter

Service Area Plan

Budget Development and Budget Execution Services [71502]

Products and Services

Description of Major Products and Services
Budget bill
Budget document
Governor's budget press package
Budget development and execution instructions for state agencies
Analysis of budget proposals and development of recommendations for the Governor
Year-end close and new-year start-up instructions for state agencies
Analyses of budget to expenditures
Decision briefs for budget execution decisions
Planning and performance measure instructions, handbook and training for state agencies
Tracking of agency performance measures
Analyses of federal budget proposals and actions that may affect Virginia
Serve on legislative and executive task forces
Advisory assistance to various panels, committees, and commissions
Presentations on fiscal and budgetary policy

Description of Major Products and Services

Anticipated Changes
Assuming no further rec

Anticipated Changes Products and Services

e are no anticipated changes at this time.

Factors Impacting
Seventy-eight percent of the Department of Planning and Budge
appropriation could adversely impact DPB's ability to deliver pro

Factors Impacting Products and Services

rsonnel costs . Decreasing general fund staffing.

Step 3:

- To edit the "Description of Major Products and Services," "Anticipated Changes," or "Factors Impacting" click on the text provided and you will be prompted with a text editing box as demonstrated below.
- Edit your text as necessary. You have some limited formatting capabilities in the top tool bar.
- Press Save!

SERVICE AREA PLANS: FINANCE

Financial Overview

Understanding an agency's financial resources is essential to linking performance management guidelines to the budgeting process. This includes knowing where the resources come from and where they will be spent at the service area level.

Tips for writing a good financial overview:

- Explain the total spending budget for the service area, the composite funding streams, and any other information that explains the nature and/or destination of the funds
- Talk about what comprises the service areas budget

Biennial Budget Table

The biennial budget table illustrates the agency's base budget for the service area and any changes to that base over the biennium. Changes to base include base budget adjustments and technical adjustments. They also encompass amendments to the base for central appropriation distributions for items such as changes in fringe benefit rates, salary increases, nongeneral fund increases approved administratively that will continue into the new biennium, adjustments to remove one-time expenditures, and to annualize partial year funding.

Tips for using the biennial budget table:

- Service Area base budget is populated from the PB system.
- Changes to the base can also be populated from the PB system by using the "..." import numbers.
- Agencies can overwrite the numbers populated by the PB system in the Changes to Base field if they are incorrect or due to anomalies in data.

Instructions for entering/editing your financial information can be found on the following page.

SYSTEM INSTRUCTIONS – FINANCE TAB

Step 1:

- To select the “Finance” for the **Program/Service Area Plan** you would like to edit, select the appropriate check box using the **Strategic Plan Filter** as demonstrated below.
- Press Submit.

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Commonwealth of Virginia

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Search

2014-16 Strategic Plan

open filter

Strategic Plan Filter
Select the strategic planning elements that you would like to work on

Agency: 122: Department of Planning and Budget Plan Version: 2014-16

Agency Plan X ✓

☐ Mission and Vision ☐ Values ☐ Information Technology ☐ Finance ☐ Customers
☐ Partners ☐ Agency Goals ☐ Objectives ☐ Measures ☐ Supporting Documents

Program / Service Area Plans X ✓

71502: Budget Development and Budget Execution Services
71504: Legislation and Executive Order Review Service
71505: Forecasting and Regulatory Review Services
71506: Program Evaluation Services
71598: Administrative Services

☐ Description
☐ Mission Alignment
☐ Products and Services
☒ Finance
☐ Supporting Documents

Submit

☐ Show Audit Information

Step 2:

- Upon entering the **Finance** tab you will be presented with the following screen shot for the service area you wish to edit.
- Please note: The first time you log into the system, all financials will display “0” until you complete all of the following steps.

Performance Budgeting System
Commonwealth of Virginia

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2014-16 Strategic Plan
Department of Planning and Budget [122]

Service Area Name

Service Area Plan

Budget Development and Budget Execution Services [71502]

Financial Overview
General fund appropriation supports personal and nonpersonal service costs for this service area.

Biennial Budget

	2015 General Fund	2015 Nongeneral Fund	2016 General Fund	2016 Nongeneral Fund
Initial Appropriation for the Biennium	0	0	0	0
Change to Initial Appropriation	0	0	0	0

Logged in as
DPB Test Account

Step3:

- To edit the “Financial Overview,” click in the text and you will be presented a text editing box as demonstrated in the screen shot below.
- Edit the text as necessary. The text box contains limited formatting capabilities.
- Press Save.

Performance Budgeting System
Commonwealth of Virginia

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Financial Overview

General fund appropriation supports p ice costs for this service area.

Limited Formatting Toolbar

Save Press Save!

Logged in as
DPB Test Account

Step 4:

- To edit/update your Biennial Budget, click into the “Biennial Budget” table and you will be presented the ability to either manually enter/update your biennial budget as demonstrated in the screen shot below or to import from the PB System.
- Note: The numbers are “0” until you either manually enter or “import numbers from PB System.”
- To manually enter/edit the numbers, click into the cell you wish to edit and make the change.
- To import your biennial budget from the PB System, click the “import numbers from PB System.” You must do this each time you edit/update your plan, they do not automatically update.
- You can edit the numbers imported from the PB System if needed. This should be done if you have any anomalies in your budget, but should be explained in the financial overview.
- Press Save.

Performance Budgeting System
Commonwealth of Virginia

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2014-16 Financial Table
Department of Planning and Budget [122]

Financial Overview - Edit the information in the table and click SAVE [Import numbers from PB System](#)

	2015 General Fund	2015 Nongeneral Fund	2016 General Fund	
Initial Appropriation for the Biennium	\$0	\$0		
Change to Initial Appropriation	\$0	\$0	\$0	

Save

logged in as
DPB Test Account

SERVICE AREA PLANS: SUPPORTING DOCUMENTATION

Organizational charts and memorandums of understanding (MOU's) are some common documents that help illustrate an agency's mission or organizational dynamic. It is recommended that you upload these to your service area plan.

Instructions for adding supporting documentation can be found on the following page.

SYSTEM INSTRUCTIONS – SERVICE AREA PLANS SUPPORTING DOCUMENTS

Step 1:

- To add a document or link as a supporting document, choose the “supporting documents” field from the filter as demonstrated below.
- Press Submit.

The screenshot shows the 'Performance Budgeting System' interface for the '2014-16 Strategic Plan'. The 'Strategic Plan Filter' section includes a dropdown for 'Agency' (122: Department of Planning and Budget) and a dropdown for 'Plan Version' (2014-16). Below this, there are two sections: 'Agency Plan' and 'Program / Service Area Plans'. The 'Program / Service Area Plans' section has a list of services on the left and a list of checkboxes on the right. The 'Supporting Documents' checkbox is checked. A callout box points to this checkbox with the text 'Select Supporting Documents'. Another callout box points to the 'Submit' button with the text 'Press Submit'.

Step 2:

- On the “Supporting Documents” screen you provided a listing of any of your previous supporting documents or links as demonstrated in the first screen shot below.
- To delete a supporting document or link, select the blue “delete” button next to the document you wish to delete.
- To attach a new file/document to your strategic plan, select the “attach file” link at the bottom of the grid and you will be directed to the “Attach” screen as demonstrated in the second screen shot below. Provide a “Title or Short Description” for the file you are attaching. Then “Browse” to where the file is stored on your PC/Network and select. Once the file path is in the “Browse” field, Press “Attach.”
- To attach a link to your strategic plan, select the “Create a Link” link at the bottom of the grid and you will be directed to the “Attach” screen as demonstrated in the third screen shot below. Provide a “Title or Short Description” for the link you are attaching. Then key the address to where the link is located. Once the link address is in the “Link” field, Press “Attach.”

EXECUTIVE PROGRESS REPORTS

EXECUTIVE PROGRESS REPORTS:

BACKGROUND AND HISTORY

The Executive Progress Report (EPR) provides a concise, strategic profile of a state agency that describes the agency's responsibilities, challenges, performance highlights, and priorities.

Agency Background Statement

Narrative that explains what the agency does and why the agency exists – its purpose, who it serves, what it does for its customers, and key statutory requirements.

Tips for writing a good agency background statement:

- It's ok to mention your statutory authority, but it shouldn't be the only discussion.
- Should be high-level, so the reader gets a general idea of who you are and what you do.
- It should expand on your mission.
- Possible sources for background information: Prior agency strategic plan background information, statutory authority.

Example of a good agency background statement:

VDOT plans, delivers, maintains and operates the transportation network based on the direction of law and the Commonwealth Transportation Board. The network is composed of a variety of assets including vehicle, pedestrian, and bicycle lanes; sidewalks, ditches, and pipes; signals and signs; ferries; and any number of other structures and activities that help move people and goods over the highway system.

Major Products and Services

A concise summary (narrative and/or list) of the mission-critical products and services provided by the agency; information about any factors impacting the product and services, and any anticipated changes in the current or next biennium.

Tips for writing your major products and services:

- If describing in list form, make sure that the "bullets" are easily understandable to the average reader.
- Do not use acronyms.
- Use short descriptive sentences.
- Possible sources for product and service information: prior agency strategic plan background information section, products and services subsection; SWOT analysis

Example of major products and services:

VDSS's most widely used services include social safety net programs (e.g. Supplemental Nutrition Assistance Program (SNAP); Temporary Assistance for Needy Families (TANF); energy and cooling assistance), Medicaid eligibility determination, child support collection, foster care and adoption services, child and adult protective services, subsidized child care, licensure of child and adult care facilities, workforce development services for TANF and SNAP recipients through the Virginia Initiative for Employment Not Welfare (VIEW) Program and refugee services.

Three programs – Medicaid, SNAP, and Child Support – each served about one million Virginians during state fiscal year 2012. As of July 2012, the number of SNAP participants was at an all time high.

Most of these services are administered by 120 local departments of social services, which VDSS supervises. VDSS also partners extensively with community-based organizations and volunteers, local government entities, other state agencies, and healthcare providers. VDSS anticipates that an increasing number of services, such as benefit program applications and Medicaid enrollment, will be conducted electronically through its new Customer portal. This will facilitate public access to services, reduce wait time and processing errors, and allow greater access to data for program staff.

Customer Summary

A high-level overview of the key customers served by your agency; any factors impacting your customer population and any anticipated changes in the current or next biennium.

Tips for writing a customer summary:

- Your narrative should correlate to the projected trend (e.g. – don't say you anticipate an increase and all of your projected trend arrows are stable).
- The narrative should "set the stage" for the customer listing.
- This should not be a discussion of products and services.
- Possible sources for customer information: prior agency strategic plan background information section, customer subsection; SWOT analysis

Example of a good customer summary:

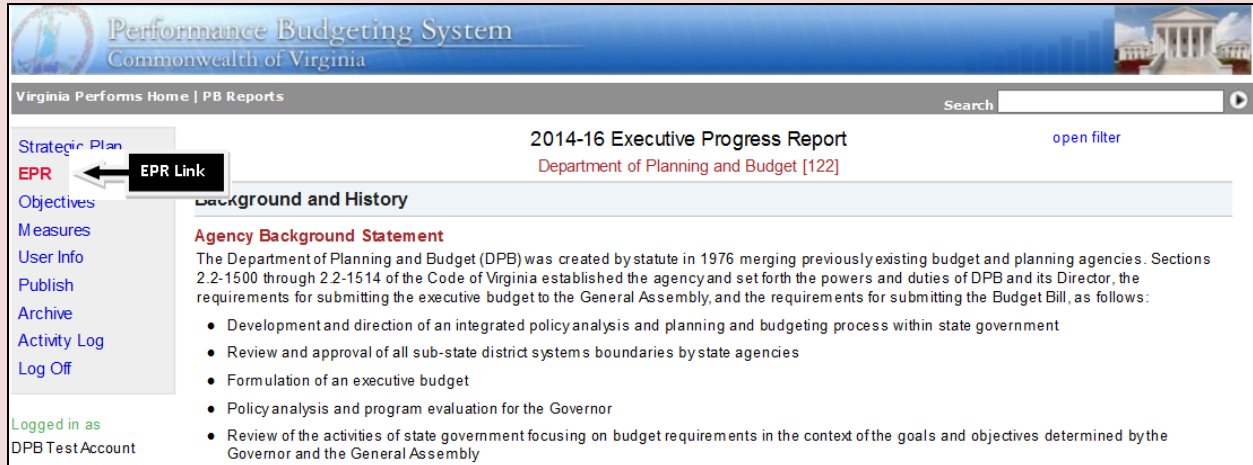
The agency expects to see modest but steady growth in its customer base as Virginia's population grows, and a continued increase in the use of Virginia's roadways is expected as measured in Vehicle Miles Traveled (VMT).

Instructions for entering/editing your Executive Progress Report can be found on the following page.

SYSTEM INSTRUCTIONS – EXECUTIVE PROGRESS REPORT, BACKGROUND AND HISTORY

Step 1:

- To access your Executive Progress Report (EPR), click the “EPR” link on the left navigation menu.



Step 2:

- After accessing your EPR, you will be prompted with the following filter so that you can select the pieces of the EPR you want to work on at a time. For this demonstration we will demonstrate the **Background and History** section.
- Press submit:

Performance Budgeting System
Commonwealth of Virginia

Virginia Performs Home | PB Reports Search

2014-16 Executive Progress Report [open filter](#)

Executive Progress Report Filter
Select the elements that you would like to work on

Agency: EPR Version:

Background and History

☒ Agency Background Statement ☒ Major Products and Services ☒ Customer Summary X ✓

Finance and Performance Management

☐ Performance ☐ Staffing ☐ Finance X ✓
☐ Agency Statistics ☐ Key Risk Factors

Management Discussion

☐ General Information About Ongoing Status of Agency X ✓
☐ Information Technology ☐ Estimate of Technology Funding Needs
☐ Workforce Development ☐ Physical Plant

☐ Show Audit Information

Step 3:

- The Background and History section of the EPR consists of three fields: Agency Background Statement, Major Products and Services, and Customer Summary.
- To edit the “Agency Background Statement,” click on the text provided and you will be prompted with a text editing box as demonstrated below.
- Edit your text as necessary. You have some limited formatting capabilities in the top tool bar.
- Press Save!

Performance Budgeting System
Commonwealth of Virginia

Virginia Performs Home | PB Reports Search

Agency Background Statement

Strategic Plan
EPR
Objectives
Measures
User Info
Publish
Archive
Activity Log
Log Off

Logged in as
DPB TestAccount

Limited Formatting Toolbar

The Department of Planning and Budget and planning agencies. Sections 2.2-18 forth the powers and duties of DPB and General Assembly, and the requirements in 1976 merging previously existing budget de of Virginia established the agency and set for submitting the executive budget to the ll, as follows:

- Development and direction of an integrated policy analysis and planning and budgeting process within state government
- Review and approval of all : /state agencies
- Formulation of an executive
- Policy analysis and program
- Review of the activities of st and objectives determined
- Operation of a system of budgetary execution to ensure agency activities are conducted within funding limitations provided in the Appropriation Act and in accordance with gubernatorial and legislative intent
- Development and operation of a system of standardized reports of program and financial performance
- Coordination of statistical data
- Assessment of the impact of federal funds on state government
- Review and verification of the accuracy of agency estimates of receipts from nongeneral fund revenue
- Development, coordination, and implementation of a performance management system involving strategic planning, performance measurement, evaluation, and performance budgeting within state

Edit Agency Background Statement Text here

Save **Press Save!**

Step 4:

- To edit “major products services,” click on the text and you will be prompted with a text editing box as demonstrated below.
- Edit your text as necessary. You have some limited formatting capabilities in the top tool bar.
- Press Save!

Performance Budgeting System
Commonwealth of Virginia

Virginia Performs Home | PB Reports

Search

Major Products Services

Strategic Plan
EPR
Objectives
Measures
User Info
Publish
Archive
Activity Log
Log Off

Logged in as
DPB TestAccount

The Commonwealth's new Performance Budgeting System (PBS) is a web-based system that integrates budget development, budget execution, capital budgeting, and performance measurement. The PBS is useful for managing and improving the efficiency of state government operations and is available to the Commonwealth's citizens and public officials. PBS's mission-critical products and services are, as follows:

- Budget bill
- Budget document
- Budget development
- Budget execution
- Analysis of budget proposals and development of recommendations for the Governor
- Year-end close and new-year start-up execution actions
- Procedures for monitoring agency expenditures
- Decision briefs for budget execution decisions
- Coordination of the executive legislative review process
- Fiscal impact statements for legislation introduced in the General Assembly
- Planning and performance measure instructions, handbook, and training for state agencies
- Tracking of agency performance measures
- Economic impact statements and policy analyses on proposed regulations

Save Press Save!

Step 5:

- To edit “customer summary,” click on the text and you will be prompted with a text editing box as demonstrated below.
- Edit your text as necessary. You have some limited formatting capabilities in the top tool bar.
- Press Save!

Virginia.gov Online Services | Help | Governor | General Assembly

Performance Budgeting System Commonwealth of Virginia

Virginia Performs Home | PB Reports Search

Customer Summary

Strategic Plan
EPR
Objectives
Measures
User Info
Publish
Archive
Activity Log
Log Off

Logged in as
DPB Test Account

The Department of Planning and Budget is a Virginia executive branch agency that develops and executes the state's budget and policy information system. The agency's operations and public service customer base is not expected to change during the 2012-2014 biennium.

Limited Formatting Toolbar

Edit Customer Summary Text here

Save **Press Save!**

Step 6:

- To populate the customers grid, click anywhere in the grid and you will be presented with the following screen.
- From this screen you will have the option to either "insert row" or to "import strategic plan customers."

Performance Budgeting System
Commonwealth of Virginia

Virginia Performs Home | PB Reports Search

2014-16 Customers
Department of Planning and Budget [122]

Customers - Edit the information in the table and click SAVE

PredefinedGroup	UserDefinedGroup	Number Served Annually	Potential Number of Annual Customers	Projected Customer Trend

Insert Row **Import Strategic Plan Customers** **Save**


Import Strategic Plan Customers

Logged in as
DPB Test Account

Step 7:

- To add customers not identified in your strategic plan, click "insert row" and provide the customers you would like included in your EPR.
- To utilize the customers identified in your strategic plan, click the "import strategic plan customers" button as identified in Step 6 and you will be presented with the following screen.

- From this screen you can edit the information by clicking within the cells of the grid.
- You can delete customers from the grid by using the red “x” located on the left side of the grid.
- To adjust the priority of the customers, use the green arrows located to the left of the grid.
- You can add additional customers by selecting the “insert row” button.
- Please note: If you wish to revert back to the customer listing without any of your changes, click the “Import Strategic Plan Customers” link. This will restore you to the original import of customers from your strategic plan.
- Press Save!


Performance Budgeting System
 Commonwealth of Virginia

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2014-16 Customers
 Department of Planning and Budget [122]

Customers - Edit the information in the table and click SAVE

	PredefinedGroup	UserDefinedGroup	Number Served Annually	Potential Number of Annual Customers	Projected Customer Trend
✗ ↓ ↑	State Agency(s),	State agencies	150	0	Stable ▼
✗ ↓ ↑	Local or Regional Government Authorities	Local school divisions	32	0	Stable ▼
✗ ↓ ↑		Governor's Secretaries and Deputy Secre	15	0	Stable ▼
✗ ↓ ↑	Governor	Governor's Policy staff	15	0	Stable ▼
✗ ↓ ↑	Governor	Governor	15	0	Stable ▼
✗ ↓ ↑	General Assembly	General Assembly members	0	0	Stable ▼
✗ ↓ ↑	State Agency(s),	DPB staff	0	0	Stable ▼
✗ ↓ ↑	Governor	Council on Virginia's Future (members)	0	0	Stable ▼

[Insert Row](#)

[Import Strategic Plan Customers](#)

EXECUTIVE PROGRESS REPORTS: FINANCE AND PERFORMANCE MANAGEMENT

Performance Highlights

The purpose of this section is to show critical performance data over time, with explanations and trend information, as appropriate. It is a discussion of key performance metrics within your agency and should include any major changes in performance and the factors contributing to these changes.

Tips for describing your agency's performance highlights:

- Should be a discussion of your agency's performance
- Discuss the factors that impact your performance.
- Should not restate your mission.
- Should explain to the reader the performance highlights included in the table.

Example of a good performance highlights statement:

One of the best measures of DMV's performance is the amount of time customers wait for service in customer service centers. During FY 2012, the statewide wait time averaged just over 16.24 minutes, which was a 20 percent improvement over FY 2011. The FY 2013 target is to maintain 20.0 minutes or less. DMV also measures transactions conducted through preferred services (i.e., the use of Internet, mail, and telephone for specific services such as vehicle registration renewal) and monitors financial performance through activity-based costing. The success of safety programs is measured by looking at the state's seat belt usage rate (FY 2013 target of 83.0 percent) and fatalities resulting from motor vehicle accidents (a target to decrease to 700 by the end of CY 2013). Significant performance indicators are listed below, including those designated as key measures (designated by an asterisk). To meet customers' needs and achieve these objectives, DMV has rolled out an array of low cost service options to conduct business with the agency. These include EZ Fleet, Troops to Trucks to streamline credentialing for military and veterans, mobile apps, DMV Connect to support prisoner re-entry initiatives, and mobile customer service centers that can serve customers at an ever changing number of locations.

Staffing

The staffing section of the EPR populates the At-a-Glance section and is intended to provide the reader with a quick snapshot of your agency's staffing levels. Later in the EPR you are able to discuss factors impacting your agency's human resources.

Tips for regarding your agency staffing:

- Staffing is pulled from PMIS, however you can over-right those numbers to provide the most up-to-date staffing numbers
- Contract staffing is not contained in PMIS, you must key in those numbers.

Financial Overview

A financial overview is a high-level discussion of the agency's total spending budget and any other information that explains the source, nature, and/or destination of funds. This section should include information on expenditures, how Virginia compares to other states with respect to budget or spending, and factors that are likely to affect the budget.

Tips for writing a good financial overview:

- Should not be negative in tone.
- Discuss the realities/challenges your agency is facing – positives and negatives.
- Should reflect budgetary actions from 2014 General Assembly Session.

Example of a good financial overview:

TUV's diverse programs are supported by a variety of funding sources including general fund support, user fees, commodity grading fees, commodity board self-assessments, and federal grants. Over the past few years, reductions in general fund support have increased the department's reliance on fees and federal grants to operate programs and respond to new demands. In addition, there are several items in the department's general fund appropriation that are mandated pass-through funding to other entities for specific users.

Fund Sources Table

The fund sources table in the Executive Progress Report displays the agency's current operating budget. This will include budget execution adjustments.

Tips for using the biennial budget table:

- Fund sources are populated from the PB system.
- Agencies can overwrite the numbers populated by the PB system if they are incorrect or due to anomalies in data.

Revenue Summary

Your revenue summary is a high-level discussion of the revenues received by the agency and any other information that explains the sources, nature and/or destination of the revenues.

Tips for writing a good revenue summary statement:

- Agencies that do not collect revenue should make a simple statement indicating that they do not collect revenue.
- Agencies that do collect revenue should summarize their revenue sources and discuss any trends they see in regards to revenue collections.
- Should be easily understandable by the general public.
- Avoid use of jargon.

Example of a good revenue summary statement:

One of DMV's important responsibilities is collecting a variety of fees, fines, and taxes for transportation-related activities. Most of these funds flow directly to accounts outside of DMV and are thus not reflected in the DMV budget. Monies collected by DMV primarily provide funds for the construction of new highways and the maintenance of Virginia's existing highway infrastructure.

Key Risk Factors

The purpose of this section is to provide information on three to five factors that will have the most significant impact on your agency over the next few years.

This section is similar to a brief SWOT analysis in that it should address the agency's internal weaknesses and external challenges (threats).

Tips for writing key risk factors:

- Narrative only.
- Should talk about "risks" and trends with risks.
- Agencies should compare their risk factors to the trends and key performance areas in the At a Glance section to ensure they align.
- Actions the agency plans to take to address key risk factors should be discussed in the Management Discussion & Analysis section.

Example of a good key risk factors statement:

Several factors will have a significant impact on the agency over the next four years.

Federal Reauthorization: On July 6, 2012, President Obama signed into law a new two-year surface transportation authorization, called Moving Ahead for Progress in the 21st Century (MAP-21). The legislation extended the current authorization through the end of federal fiscal year 2012, and then authorizes \$105 billion over the next two fiscal years. Considering previous transportation authorizations, the time period of this legislation does not provide for any long-term funding commitments.

Congestion: while the vast majority of the state roadway system remains uncongested most of the time, recurring congestion continues to be a problem in urbanized areas during peak travel periods. As economic conditions improve, roadway use and associated congestion typically increases as well.

Asset Condition: VDOT continues to maintain and improve roadway pavement and bridge condition towards their respective condition targets, and has made excellent progress over the last few years. However, roadways and bridges continue to need regular inspection, repair and replacement, and day-to-day wear and tear will increase as the number of vehicles increase and the population grows.

Agency Statistics

This section is a high-level discussion of key statistics in your agency that show the breadth and/or depth of the agency's work. This should be something other than what is being measured by your performance measures.

Tips for writing statistics summary:

- Should only be a brief introduction to the statistics listing below.
- Statistics are not necessarily measures.
- These are the “trendy” topics in your subject area.
- Does not need to be statistics your agency controls – can be factors impacting your programs.

Example of a statistics summary statement and key statistics:

The following statistics illustrate the breadth of services provided by VDSS and local department of social services. The majority of the statistics are based on FY 2012 data.

- Virginians receiving SNAP – 1,111,648
- Virginians receiving TANF – 140,907
- Virginians enrolled in Medicaid – 1,157,975
- Households getting fuel assistance – 147,489
- Child support enforcement cases – 336,125

Instructions for entering/editing your Executive Progress Report can be found on the following page.

SYSTEM INSTRUCTIONS – EXECUTIVE PROGRESS REPORT, FINANCE AND PERFORMANCE MANAGEMENT

Step 1:

- After accessing your EPR, you will be prompted with the following filter so that you can select the pieces of the EPR you want to work on at a time. For this demonstration we will demonstrate the **Finance and Performance Management** section.
- Press Submit!

Performance Budgeting System
Commonwealth of Virginia

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2014-16 Executive Progress Report

Executive Progress Report Filter
Select the elements that you would like to work on

Agency: 122: Department of Planning and Budget
EPR Version: 2014-16

Background and History

☐ Agency Background Statement ☐ Major Products and Services ☐ Customer Summary X ✓

Finance and Performance Management

☒ Performance ☒ Staffing ☒ Finance X ✓
☒ Agency Statistics ☒ Key Risk Factors

Management Discussion

☐ General Information About Ongoing Status of Agency X ✓
☐ Information Technology ☐ Estimate of Technology Funding Needs
☐ Workforce Development ☐ Physical Plant

Submit Press Submit

Show Audit Information

The **Background and History** section of the EPR consists of five fields: **Performance, Staffing, Finance, Agency Statistics, and Key Risk Factors.**

Step 2:

- To edit “Performance Highlights,” click on the text provided and you will be prompted with a text editing box as demonstrated below.
- Edit your text as necessary. You have some limited formatting capabilities in the top tool bar.
- Press Save!

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DPB Test Account

Performance Highlights

Limited Formatting Toolbar

Performance measures or outcomes were developed by the Department of Planning and Budget (DPB) as part of Virginia's outcome-driven performance management system. Agency and on its major or most important programs or activities to strengthen the relationship between internal and external stakeholders. Productivity measures are designed to measure the desired outcome and performance.

Virginia continues to lead as one of the best managed states in the nation. Virginia was named one of the best managed states in the nation by the *Government Performance Project* sponsored by *Governing* magazine. Virginia's financial strength is indicated by its AAA bond rating and being one of nine states given this highest rating by all three national rating agencies. Virginia consistently ranks top in the United States in categories that impact successful economic development. Virginia ranked No. 2 in the *Forbes Best States for Business* in 2010 and 2011. The *Forbes* ranking measured six vital categories for businesses: costs, labor supply, regulatory environment, current economic climate, growth prospects, and quality of life. In the *Pollina Corporate Top 10 Pro-Business States for 2012*, Virginia ranked No. 2 in the nation. CNBC, in its annual study, *America's Top States for Business*, designated Virginia as one of the top states for business at No. 3 in 2012.

The Department of Planning and Budget (DPB) is required by Section 2.2-4007.04, Article 2, of the Code of Virginia to manage the Virginia Regulatory Town Hall Web site; to publish, as well as provide online public comment forums for, all (non-exempt) regulatory stages; and, prepare an economic impact analysis (EIA) for a proposed regulation within 45 days of its receipt by DPB and within 30 days of receipt for a fast-track regulation. DPB is required to provide a copy

Save Press Save!

Step 3:

- To edit the “selected measures” associated with your performance highlights, click anywhere on the table and you will be directed to an editable listing of all of your agency measures.
- The following fields of the “selected measures” table are locked and cannot be edited: **Measure ID, Measure Name, and Measure Class.**
- To select a measure that you want to be included in the “selected measures” table of the EPR, click in the “Highlighted in EPR” box. Only include those measures you want included in your EPR and that are discussed in the **Performance Highlights** section.
- To select a measure that you want to be included in the **At-A-Glance** section of the EPR, click in the “Included in At A Glance” box. Only include those measures you want included in the **At-A-Glance** section of the EPR.
- For measures selected to be in the **At-A-Glance** section, you are required to provide an “alternative name” for your measure. To do this, click in the “alternative name” cell and provide an abbreviated name for your measure.
- For measures selected to be in the **At-A-Glance** section, you are required to provide an “estimated trend” for your measure. To do this, click in the “Estimated Trend” cell to select whether the selected measure is “Improving,” “Worsening,” or “Maintaining.”
- You are able to prioritize the measure you want to include in “selected measures” table by using the green arrows on the right side of the table.

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Commonwealth of Virginia

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2014-16 EPR Selected Measures
Department of Planning and Budget [122]

Edit the information in the table and click **Save**
Press Save!
[Return to EPR](#)

Measure ID	Measure Name	Alternative Name	Measure Class	Estimated Trend	Highlighted in EPR	Include in At A Glance	
12271502.002.002	Administratively approved appropriations as a percentage of legislative appropriations.	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	Other Agency	.. <input type="button" value="v"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div style="display: flex; align-items: center;"> <div style="text-align: right; padding-right: 5px;"> Include in At A Glance </div> <div style="text-align: left; padding-left: 5px;"> </div> </div>
M122SA 12001	Percent of accounts payable transactions that post correctly to the Commonwealth Accounting and Reporting System (CARS)	Accounts Payable Transactions	Productivity	Select Estimated Trend	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div style="display: flex; align-items: center;"> <div style="text-align: right; padding-right: 5px;"> </div> <div style="text-align: left; padding-left: 5px;"> </div> </div>
12271505.001.001	Percentage of economic impact analyses that are completed within 45 days from receipt of proposed and fast-track (stage) regulatory proposals.	<div style="display: flex; align-items: center; justify-content: center;"> <div style="text-align: right; padding-right: 5px;"> </div> <div style="text-align: left; padding-left: 5px;"> Provide Alternative/Short Measure Name <div style="border: 1px solid black; height: 20px; width: 100%;"></div> </div> </div>	Other Agency	Select Estimated Trend	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div style="display: flex; align-items: center;"> <div style="text-align: right; padding-right: 5px;"> Highlight in EPR </div> <div style="text-align: left; padding-left: 5px;"> </div> </div>
12271502.001.001	Ratio of recurring general fund revenue to recurring general fund spending.	Revenue/Spending	Agency Key	Maintaining <input type="button" value="v"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div style="display: flex; align-items: center;"> <div style="text-align: right; padding-right: 5px;"> </div> <div style="text-align: left; padding-left: 5px;"> </div> </div>
12271505.002.002	Accuracy of the agency's forecast for total state responsible inmate population.	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	Other Agency	.. <input type="button" value="v"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div style="display: flex; align-items: center;"> <div style="text-align: right; padding-right: 5px;"> Prioritize Measures </div> <div style="text-align: left; padding-left: 5px;"> </div> </div>
12200000.002.001	Average rate of survey respondents' satisfaction with the timeliness and quality of the agency's analyses.	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	Agency Key	.. <input type="button" value="v"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div style="display: flex; align-items: center;"> <div style="text-align: right; padding-right: 5px;"> </div> <div style="text-align: left; padding-left: 5px;"> </div> </div>
12271504.001.003	Average satisfaction rating of the Governor's policy staff with the quality and timeliness of the impact analyses.	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	Other Agency	.. <input type="button" value="v"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div style="display: flex; align-items: center;"> <div style="text-align: right; padding-right: 5px;"> </div> <div style="text-align: left; padding-left: 5px;"> </div> </div>

Step 4:

- After the "selected measures" table, you will find the "agency trends" table which is part of the **At-A-Glance**. To edit the "agency trends" associated to include in the **At-A-Glance** Section, click anywhere on the table and you will be directed to an editable listing of the agency trends from your prior EPR.
- To edit the text of a "trend name," click in the cell and edit as needed.
- To insert a new trend, use the "insert row" button. Agencies should have no more than three trends at this time.
- To delete a trend, use the red "x" located on the left of the grid.
- To reorder/prioritize agency trends, use the green arrows located on the left of the grid.
- To modify the trend direction, use the "direction" drop down to select one of the following trend directions: "increase," "decrease," or "steady."
- Press Save!

Performance Budgeting System
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2014-16 Agency Trends
Department of Planning and Budget [122]

Select Trend Direction

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Delete Agency Trend

Reorder/Prioritize Agency Trends

Agency Trend	Trend Name	Direction
✓	and Accountability	Steady
✓	ains Bond Rating	Steady
✓	Virginia a Best-Managed State	Steady

Insert Row

Save

Press Save!

Logged in as
DPB TestAccount

Step 5:

- After the “agency trends” table, you will find the “staffing” table which is part of the **At-A-Glance**. To edit the “staffing” associated to include in the **At-A-Glance** Section, click anywhere on the table and you will be directed to an editable listing your staffing with suggested values pulled from PMIS.
- You are able to use “suggested values” for “Authorized Maximum Employment Level,” “Salaried Employees,” and/or “Wage Employees.” Please note: “Contracted Employees” is not kept in PMIS and therefore the agency is responsible for these values.
- To utilize the “suggested values,” click on the blue/underlined linked value in the “suggested values” column.
- If the number populated from PMIS is incorrect or there is an anomaly with your data, you can over-write that value by clicking in the middle column and manually key in the corrected value.
- To populate the value for “contracted employees,” click in the corresponding cell and manually key in the value.
- Press Save.

Performance Budgeting System
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2014-16 Staffing
Department of Planning and Budget [122]

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Authorized Maximum Employment Level (MEL)

Salaried Employees

Wage Employees

Contracted Employees

65

48

4

0

65.00 - system

48 - Calculated from recent PMIS data.

4 - Calculated from recent PMIS data.

PMIS Link for Import

ed from the PB

Edit PMIS Values Here

Type Contracted Employee Value Here

Save

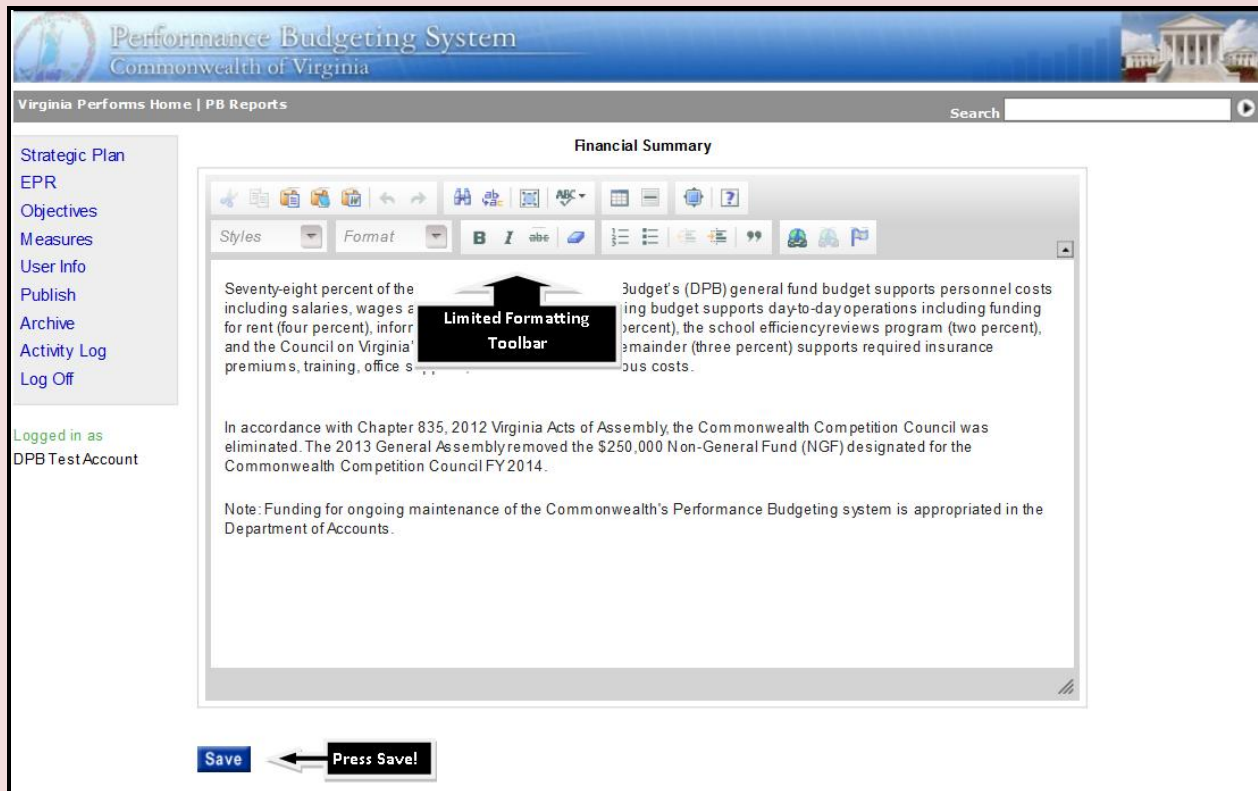
Press Save!

Logged in as
DPB TestAccount

You can click on the link for the suggested values to populate the appropriate field. For a variety of special circumstances, the suggested values may not be correct for your agency. In those cases, please manually enter the correct values.

Step 6:

- After the “Staffing” section you will find the “Financial Summary.”
- To edit the “Financial Summary,” click on the text provided and you will be prompted with a text editing box as demonstrated below.
- Edit your text as necessary. You have some limited formatting capabilities in the top tool bar.
- Press Save.



Step 7:

- Below the “Financial Summary” you will find the “Fund Sources” table.
- To edit/update your “Fund Sources”, click into the “Fund Sources” table and you will be presented the ability to either manually enter/update your biennial budget as demonstrated in the screen shot below or to import from the PB System.
- Note: The numbers are “0” until you either manually enter or “import numbers from PB System.”
- To manually enter/edit the numbers, click into the cell you wish to edit and make the change.
- To import from the PB System, click the “import numbers from PB System.” You must do this each time you edit/update your plan, they do not automatically update.
- You can edit the numbers imported from the PB System if needed. This should be done if you have any anomalies in your budget, but should be explained in the “Financial Summary.”
- Press Save.

Performance Budgeting System
Commonwealth of Virginia


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2014-16 Fund Sources
Department of Planning and Budget [122]

Edit the information in the table and click **Save** **Press Save!**

Fund	FY 2015	FY 2016

[Insert Row](#) [Import from PB System](#) [Return to EPR](#)


Insert Row


Import numbers from PB System

Step 8:

- Following the “Fund Sources” table you will find the “Revenue Summary.”
- To edit the “Revenue Summary,” click on the text provided and you will be prompted with a text editing box as demonstrated below.
- Edit your text as necessary. You have some limited formatting capabilities in the top tool bar.
- Press Save.

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[EPR](#)

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DPB Test Account

Revenue Summary



In accordance with Chapter 3, 2012 Special Session, \$200,000 from the general fund was provided to support the school efficiency review program FY 2014. Each participating school division shall pay 50 percent of the cost incurred by the state for the school efficiency review fees are deposited into the Commonwealth's General Fund upon receipt and are not for the use of the Department of Planning and Budget.

In accordance with Chapter 806, Acts of Assembly of 2013, \$325,000 from the general fund was provided to support the school efficiency reviews program FY 2014. Each participating school division shall pay a local share of the cost incurred by the state for that school division's efficiency review to be conducted. The local share shall be based on the local ability-to-pay for each participating school division but not less than 50 percent of the total cost. Revenues generated by the school efficiency review fees are deposited into the Commonwealth's General Fund upon receipt and are not for the use of the Department of Planning and Budget.

Additionally, the 2013 General Assembly provided a Nongeneral Fund (NGF) appropriation of \$300,000 FY 2014 to support the school efficiency reviews program coordinated by the Department of Planning and Budget. Each participating school division shall pay 100 percent of the cost of the review to the Department of Planning and Budget. General fund appropriations shall not be used to support these school efficiency reviews. The NGF appropriation is provided for use by the Department of Planning and Budget to facilitate the collection of payments from school divisions.

Limited Formatting Toolbar

Save **Press Save!**

Step 9:

- Following the “Revenue Summary,” you will find the “Key Risk Factors” narrative.
- To edit the “Key Risk Factors,” click on the text provided and you will be prompted with a text editing box as demonstrated below.
- Edit your text as necessary. You have some limited formatting capabilities in the top tool bar.
- Press Save.

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Key Risk Factors

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Maintaining funding for core services: The strategic planning and budget process. As p of scarce resources. DPB will remain challe of state government and to maintain structur growth while large entitlement programs such as medicaid will continue to see significant growth. Structural balance is maintained by the utilization of recurring revenue to support ongoing operations. The use of one-time or non-recurring revenue for ongoing operations and potential federal reductions puts the state's bond rating at risk. DPB will experience increased pressure to remain vigilant in maintaining financial responsibility and a structural balance in the state's budget.

Loss of experienced finance workforce: DPB depends upon obtaining quality information and data from state agencies. As the workforce ages and has been downsized, many agencies are not able to develop replacement staff. Lack of good succession planning in key finance positions could lead to difficulties in managing financial crisis in the future. Central agencies like DPB may be called upon more often to help agencies resolve issues that once were managed by agency-based staff.

Save Press Save!

Step 10:

- Following “Key Risk Factors,” you will find the “Statistics Summary” statement.
- To edit the “Statistics Summary,” click on the text provided and you will be prompted with a text editing box as demonstrated below.
- Edit your text as necessary. You have some limited formatting capabilities in the top tool bar.
- Press Save.

Step 11:

- Below the “Statistics Summary” you will find the “Agency Statistics” table.
- To edit the “Agency Statistics” table, click anywhere on the table and you will be prompted with an editable grid as demonstrated below.
- To edit the “Description” or “Value” of an agency statistics, click in the appropriate cell and key in your revision.
- To add a new agency statistic, click the “Insert Row” link located at the bottom of the grid.
- To delete an agency statistic, click the red “X” located on the left side of the grid next to the agency statistic you wish to deleted.
- To reorder/prioritize your agency statistics, use the green arrows located on the left side of the grid.
- Press Save.

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2014-16 Agency Statistics

Department of Planning and Budget [122]

Agency Statistics - Edit the information in the table and click SAVE

	Description	Value
✖ ↓ ↑	Number of Agency Base Budgets	186
✖ ↓ ↑	Number of Agency Base Budget Adjustments	230
✖ ↓ ↑	Number of Amended Session Decision Packages	915
✖ ↓ ↑	Number of Technical Adjustments	220
✖ ↓ ↑	Number of Amended Session Capital Budget Requests	82
✖ ↓ ↑	Number of New Maintenance Reserve Requests	4
✖ ↓ ↑	Number of Maintenance Reserve Plans	3365
✖ ↓ ↑	Number of Budget Execution Requests	5045
✖ ↓ ↑	Performance Measures	1327
✖ ↓ ↑	Economic Impact Statements	1798
✖ ↓ ↑	Regulatory Proposals	232
✖ ↓ ↑	Number of Economic Impact Statements	154

[Insert Row](#) [Save](#) [Press Save!](#)

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Delete Agency Statistic

Edit Agency Statistics: Value

Edit your Description

Reorder/Prioritize Agency Statistics

EXECUTIVE PROGRESS REPORTS:

MANAGEMENT DISCUSSION

General Information About the Ongoing Status of the Agency

A high-level discussion of the strategically most important initiatives within your agency for the next biennium (or longer) aimed at improving performance, dealing with executive and General Assembly priorities including enterprise priorities, and addressing key risk factors

Tips for providing general information about the ongoing status of the agency:

- Should discuss what is going on currently in the agency and what's could happen in the future.

Example of a good statement regarding the ongoing status of the agency:

DMV will continue initiatives to improve service with upgrades to service center operating equipment, partnerships with other state agencies, and increased functionality of electronic services. DMV will also be opening an office at Fort Lee at no cost to the Commonwealth.

Agency initiatives to reduce IT, postage, printing, and telecommunications costs have already yielded savings of over \$5.5 million and over nine million pieces of paper. IT improvements have delivered savings through the issuance of personal identification numbers (PIN), electronic vehicle and driver renewal notifications, online driver's license and special license plate order tracking, EZ Fleet titling and registration, and citizen account management through MyDMV. The agency has an ongoing initiative to seek new ways to reduce costs.

DMV will continue to increase enforcement and promote the collection of revenue for the Commonwealth through a variety of enforcement tools and dedicated law enforcement resources. DMV will maintain its high collection rate, maintain support to localities through the Vehicle Registration Withholding program, and enforce fuels tax collection through its dedicated law enforcement personnel.

Information Technology

A high-level discussion of key technology initiatives underway and/or issues your agency is facing. The statement should begin with a synopsis of the current state (technology issues and initiatives underway) and then should address the agency's most significant future technology needs and plans.

Tips for writing your information technology statement:

- Should discuss current state and future needs.
- Should refrain from negative comments about VITA/NG

Example of a good information technology statement:

Major IT investments underway include:

FMS Sun Set & Data Marts: The implementation of the Cardinal Project has necessitated the sun setting of both the FMSI and FMSII Financial Systems and retention of business critical data. Sun setting of these systems in an organized fashion will create greatly reduced operational expenses from VITA. The FMS Data Marts will retain critical data from the FMSI and FMSII Financial Systems and create a Financial Data Store for reporting purposes. The objective of this project is to have the data store information available to VDOT internal systems to merge with Cardinal financial data for business intelligence reporting.

Urban Conversion: The Urban Conversion Project is a VDOT project to outsource the management and execution of the data transformation activities to convert the center lines, route and street names, textual attributes, and geospatial data from multiple data sources and in order to deliver a unified data set to populate the Road Network System with a cleansed, standardized and normalized attribute and geospatial data set for the entire state of Virginia. The inputs for the process come from the following systems: VDOT RCL, VGIN E-RCL, and UMIS.

Customer Service Center (CSC) System 2.0: The Customer Service Center Portal 2.0 project will enhance the functionality and usability of the Customer Service Center Portal, and will: – Enable Customer Service Center Agents to better respond to customer inquiries; – Promote VDOT’s ability to share information throughout the agency; and – Enhance VDOT’s ability to quickly and efficiently respond to citizen requests for roadway service/maintenance.

Information Technology Plans/Needs:

Electronic Bulletin Board – This project entails the rollout of an Electronic Bulletin Board agency- wide. This will include hardware installation, setup, operational support, and content infrastructure development.

Safety Loss Control Data Management System – This effort includes global management of Safety and Health forms related to Injuries, Tort, Drug Testing, Training Certifications, etc. Internal resources would be required for data migration and interfaces to existing systems.

SYIP Technology Upgrade - The technical platform for the SYIP Technology Suite is grossly outdated. This project will modernize physical architecture, which will require recoding to make the application work with current versions of Windows and SQL Server. This project will also migrate the point-to-point interfaces to real-time integration for more efficient data sharing.

Traffic Safety EDW - VDOT is responsible for basing many decisions on safety-related data, which is necessarily maintained at an aggregate level. Summarizing this data for calculations and reporting according to standardized processes is needed for a better informed decision making workflow.

Workforce Development

A description of important issues related to your workforce and the agency's plans and priorities for addressing those issues; descriptions of plans as appropriate for enhancing knowledge and skills, strengthening succession planning, and dealing with factors such as recruiting and aging of the workforce (e.g., succession planning).

Tips for writing your workforce development statement:

- Should discuss how your agency looks and the challenges it is facing in regards to workforce issues and development.
- What's the current picture?
- What are the issues?
- Any steps being taken to address the risks?

Example of a good workforce development statement:

The DMV workforce will be faced with an evolving technological environment and frequently changing processing requirements. Problem solving, analytical and decision-making skills, and the ability to comprehend and disseminate complex information will all be requirements for the new "knowledge worker." DMV will use several strategies to ensure that the agency's workforce is able to adapt to operational changes and competently provide quality services. Key strategies start with comprehensive workforce and succession planning. In addition, the agency will use a systematic approach for training that involves the continuous improvement of employees' technical skill sets and coaching for improved performance. Training will be provided to all employees, with a strong emphasis on technical training for our customer service centers and our customer service contact centers. The implementation of a revised supervisory program will enhance the competencies of supervisory staff and improve the functioning of operational units. Additionally, the continued use of a leadership program will prepare future leaders of the organization.

Physical Plant

A high-level discussion of issues and priorities for the agency's owned or leased office space and other physical plant; description of major current projects and longer-term needs necessitated by condition, new mandates, changing customer needs, etc.

Tips for writing your physical plant statement:

- You should talk about real concerns with your agency's physical plant.
- Should not just state the address.

Example of a good physical plant statement:

VDSS currently has 30 leases throughout the Commonwealth in support of its mission. The total annual lease cost is approximately nine million dollars. Management of these leased spaces is a collective effort between VDSS and the Department of Real Estate Services (DRES).

Besides the day-to-day management of the leased space, VDSS has no major physical plant projects planned. VDSS successfully meets all established requirements and standards in providing accommodations, facilities, equipment and amenities that are suitable for employees.

VDSS and DRES meet monthly to discuss leases that are set to expire within two to three years. This discussion is critical in planning and budget preparation for the home office or regional, district, or licensing offices.

Instructions for entering/editing your Executive Progress Report can be found on the following page.

SYSTEM INSTRUCTIONS – EXECUTIVE PROGRESS REPORT, MANAGEMENT DISCUSSION

Step 1:

- After accessing your EPR, you will be prompted with the following filter so that you can select the pieces of the EPR you want to work on at a time. For this demonstration we will demonstrate the **Management Discussion** section.
- Press Submit!

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2014-16 Executive Progress Report

Executive Progress Report Filter
Select the elements that you would like to work on

Agency: 122: Department of Planning and Budget

EPR Version: 2014-16

Background and History

☐ Agency Background Statement ☐ Major Products and Services ☐ Customer Summary X ✓

Finance and Performance Management

☐ Performance ☐ Staffing ☐ Finance X ✓

☐ Agency Statistics ☐ Key Risk Factors

Management Discussion

☒ General Information About Ongoing Status of Agency X ✓

☒ Information Technology ☒ Estimate of Technology Funding Needs

☒ Workforce Development ☒ Physical Plant

Submit Press Submit

☐ Show Audit Information

Step 2:

- To edit the “General Information About Ongoing Status of Agency,” click on the text provided and you will be prompted with a text editing box as demonstrated below.
- Edit your text as necessary. You have some limited formatting capabilities in the top tool bar.
- Press Save.

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Ongoing Status

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The Department of Planning and Budget budgeting process and advises the Governor on the health of the Commonwealth. DPB will review the services of state government. As part of its responsibilities, DPB will allocate resources to large entitlement programs, local sheriff offices that protect our smallest communities. Decisions about the proper funding levels for each of these requires a good deal of information and analysis. DPB also must be poised to react quickly in its advisory capacity to changes in revenue that affect financial responsibility and structural balance in the state's budget. In order to maximize its ability to successfully respond to economic changes, DPB must focus on transferring its institutional knowledge through the recruitment and development of a well trained staff.

DPB must address two pressing workforce issues over the next biennium: a highly competitive market of well-educated and skilled staff, and, an aging workforce in key positions that either are, or soon will be, eligible for retirement. During the next two years, DPB will attempt to increase its staffing levels and analyze its organizational structure to determine where existing resources can best be directed toward sound succession planning. DPB will determine what training is needed to support staff, especially those placed in new roles and for new employees. Training could be provided externally through outside vendors, or it could be developed internally.

Save Press Save!

Step 3:

- Following the "Ongoing Status," you will find the "Information Technology" narrative.
- To edit the "Information Technology" click on the text provided and you will be prompted with a text editing box as demonstrated below.
- Edit your text as necessary. You have some limited formatting capabilities in the top tool bar.
- Press Save.

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Information Technology

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The Virginia Information Technologies Agency (VITA) provides strategic direction for the use of technology resources. VITA oversees the selection, selection, control, and evaluation of Executive Branch Agency business objectives.

The Commonwealth's Performance Budgeting System is fully implemented and is the first systematic and consolidated overhaul of the state's budget system in Virginia since the early 1980s. The Performance Budgeting System combines under one system: budget development; budget execution; capital; strategic planning; and performance measurement. The Department of Planning and Budget (DPB) is responsible for overseeing the operation and maintenance of the system. The ongoing cost of this effort will be paid for through rates charged to state agencies.

DPB's Web-based Electronic Fiscal Impact Statement System and Virginia Regulatory Town Hall Web site application are long-standing applications, whereas the Commonwealth's Performance Budgeting System and the strategic process are new.

DPB's Web-based Electronic Fiscal Impact Statement System simplifies the tracking and development of Fiscal Impact Statements (FIS). FIS are issued on bills introduced during the General Assembly sessions. FIS describe the fiscal impact of proposed legislation and are intended to aid legislators and the Governor's Office in the decision-making process. Each FIS is electronically communicated to legislative services where it is posted electronically with

Save Press Save!

Step 4:

- Following the "Information Technology," you will find the "Workforce Development" narrative.
- To edit the "Workforce Development" click on the text provided and you will be prompted with a text editing box as demonstrated below.
- Edit your text as necessary. You have some limited formatting capabilities in the top tool bar.
- Press Save.

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Workforce Development

Styles Format B I U ABC

The Department of Planning and Budget (DPB) services to its customers. DPB also employs w and unexpected staff turnover. Generally, wage reductions and attrition due to retirements, DPE from a total authorized position level of 69. DPB

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Toolbar

sified state employees for the delivery of t classified staff during peak work periods percent of DPB's staff. Due to budget l of 43 full-time and four wage employees ccession planning a priority.

Due to an aging workforce and low staffing levels, DPB will develop a succession plan that promotes a logical and systematic transfer of institutional knowledge to a new generation of associate directors and budget analysts. One potential approach for achieving this end would be the establishment of an internal career progression path in which mid-manager positions are created.

Save Press Save!

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Step 5:

- Following the “Workforce Development,” you will find the “Physical Plant” narrative.
- To edit the “Physical Plant” click on the text provided and you will be prompted with a text editing box as demonstrated below.
- Edit your text as necessary. You have some limited formatting capabilities in the top tool bar.
- Press Save.

SYSTEM PUBLISHING

SYSTEM PUBLISHING

As indicated in the “roles and responsibilities” section of this document, the “action role” is placed on the agencies and the DPB Budget Analyst for various elements of strategic plans, performance measures and the Executive Progress Report. The following chart indicates who is responsible for publishing elements of the plan; detailed instructions of how to publish using the system are found on the following pages.

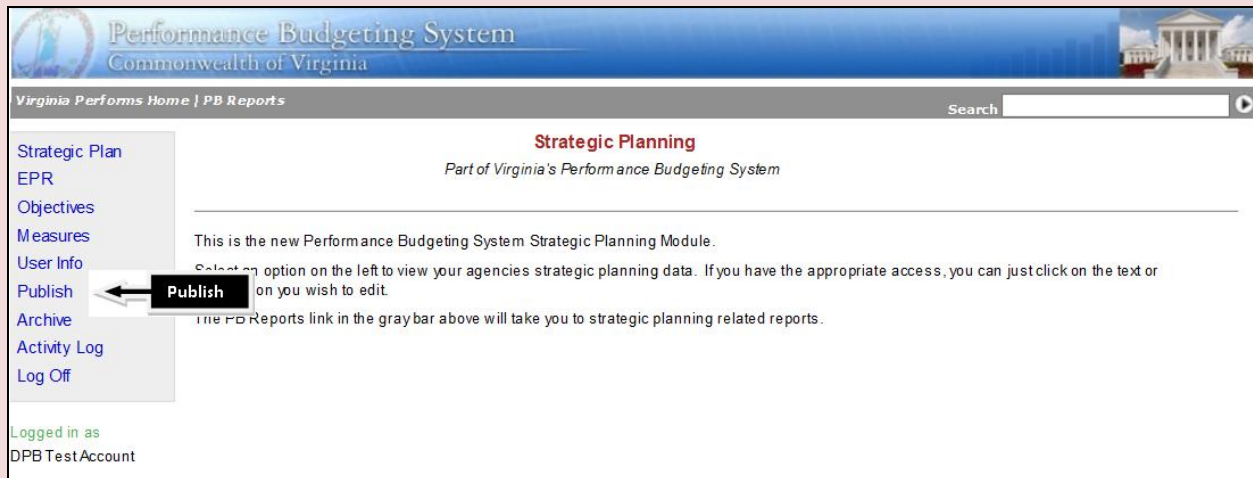
Please note: the ability to publish is based on your login security credentials. Agencies with multiple strategic plan module users should develop internal controls/procedures for publishing strategic plans program/service area plans and measure results.

Plan Element	Who Publishes
Strategic Plan	Agency
Program/Service Area Plan	Agency
Measure Results	Agency
Changes to Measure/Measure Attributes	DPB
Executive Progress Reports	DPB

SYSTEM INSTRUCTIONS – PUBLISHING

Step 1:

- To access system publishing, use the “Publish” button on the left side of the module to access system publishing as demonstrated in the screen shot below.




Step 2:

- Once in the **Publish screen**, agencies and DPB analyst can utilize the “Action” column to publish elements of the plan ready to be published. If you do not have permission to publish, the action item will be blank.
- You must select the version of the plan you wish to version and press Submit. ***The 2014-16 version should be used for completion of the 2014-2016 plan. To publish measure results for FY 2014 you must select the 2012-2014 version.***


Please note: the ability to publish is based on your login security credentials. Agencies with multiple strategic plan module users should develop internal controls/procedures for publishing strategic plans, program/service area plans, and measure results.

Step 3:

- To publish an element, click the “Publish” link in the “Action” column.
- Once you have clicked “Publish,” the “Sync Status” column will change from “Not In Sync” to “In Sync.”
- From the **Publish screen**, agencies can “Email the DPB Analyst” to notify their DPB Analyst that they have published, to ask questions, or to notify that measure/measure attributes or the Executive Progress Report are ready for their review and publish.



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Email the DPB Analyst

of Planning and Budget

Version 2014-16

Submit

[Linking history in the activity log](#)

Sync Status

Press Submit

[Email the DPB Analyst](#)

Brian Logwood (GG),Karen Lux(GG),Jason Saunders (GG)

Plan	Code	Last Published	Sync Status	Action
Executive Progress Report		4/9/2014 03:57 pm	In Sync	
Agency Plan		4/9/2014 02:13 pm	Not In Sync	Publish
Service Area Plan			Not In Sync	Publish
Service Area Plan	71504		Not In Sync	Publish
Service Area Plan	71505		Not In Sync	Publish
Service Area Plan	71506		Not In Sync	Publish
Service Area Plan	71598		Not In Sync	Publish
Program Plan	none for this agency and version			

Plan Element

Publish

Independent of the version selected above

	Last Published	Sync Status	Action
Measures		In Sync	
Measure Results Data		In Sync	Publish

Publish

Agency Planning Handbook – System Publishing
2014 – 2016 Biennium

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