



GOVERNOR'S OFFICE OF Planning & Budget

Agency Strategic Planning Q&A

September 28, 2022



GOPB Strategic Plan



GOPB STRATEGIC PLAN

Driving the best investment and use of Utah's resources

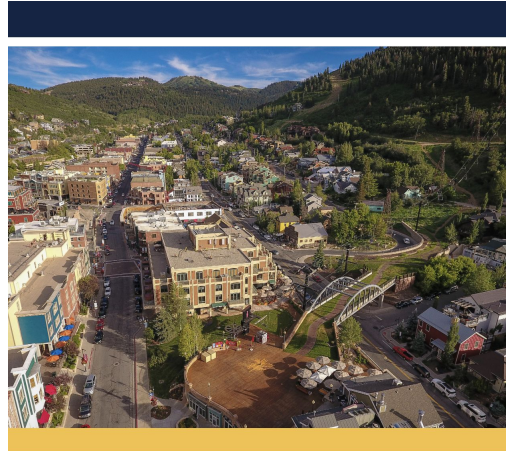
Updated July 2022



GOVERNOR'S OFFICE OF
Planning & Budget



Strategic Planning Guidance



GOBP GUIDE TO STRATEGIC PLANNING

How to develop and use strategic plans to drive the best use of Utah's resources

Updated July 2022



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Mark your calendars

Approved strategic plans are due **July 2023**

- FY 24 - Strategic plans tying budget requests to goals are **encouraged**
- FY 25 - Strategic plans tying budget requests to goals are **expected**

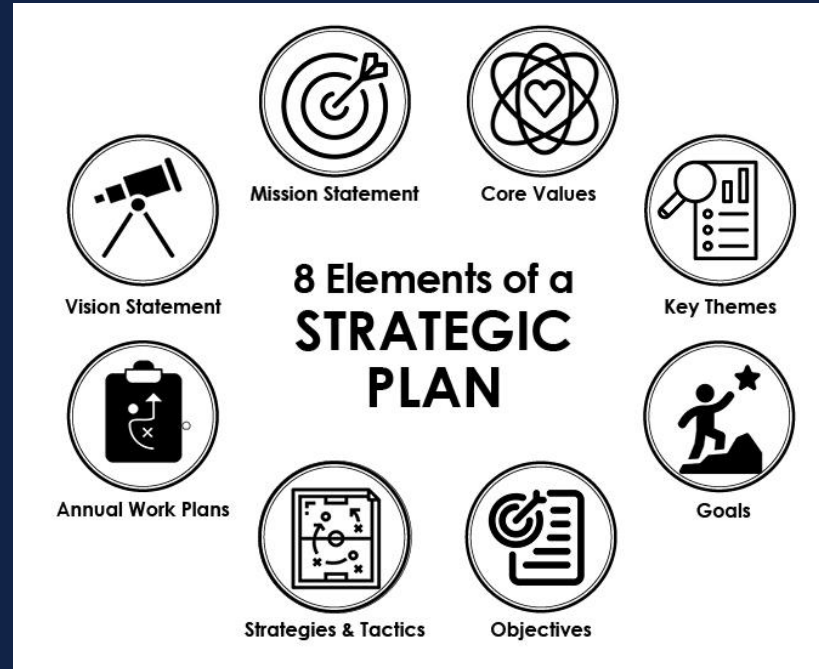


Why a strategic plan?

- Promotes effective work
- Facilitates performance management
- Improves strategic budgeting



Strategic plan components





Required items

- Performance measures
- Specific equity goals
- Anticipated budget requests
- Legacy projects (if applicable)



Process overview

ORGANIZE	INFORM	ANALYZE & PRIORITIZE	WRITE
<p>Discuss strategic team makeup</p> <p>Form a team</p> <p>Hold a kickoff meeting</p> <p>Map out the process</p> <p>Draft a timeline</p>	<p>Have internal conversations</p> <p>Collect information</p> <p>Assess performance, challenges, opportunities, and equity</p>	<p>Analyze feedback</p> <p>Organize feedback: What resources are needed? What efforts are successful? Where are opportunities for growth?</p> <p>Determine priorities</p>	<p>Create an outline</p> <p>Determine format</p> <p>Refine plan elements</p> <p>Finalize action plans</p> <p>Draft plan (include GOPB!)</p> <p>Plan rollout</p> <p>Final release</p>

[illegible]



STATE AGENCY SUCCESS STORIES



Department of Alcoholic Beverage Services

"Creating the strategic plan for our agency has many benefits, many of which we continue to see today. The process provided the opportunity to **build stronger partnerships** with external stakeholders as we relied on their perspectives on the effectiveness of our operations and how they think we might improve. We also **empowered many employees** to share their honest views about the organization to learn from and incorporate their ideas. Leaders in our department took a step back to truly listen to those who regularly interact with our department in order to **develop tangible goals and tactics for achieving them**. The strategic plan keeps us **focused and organized** as we continue to enact efficiencies and improve customer service. Plus it is so rewarding to check off achievements along the way!"

- Michelle Schmitt, Communications Director



Department of Agriculture and Food

"Having a strategic plan in place has helped our department **focus our efforts** so we are all working toward unified goals. This has helped us **plan for future projects** and better identify our needs for staff and budgets."

- Commissioner Craig Buttars



Insurance Department

Having a strategic plan for our department is critical to our success. Going through the planning process helped **get our team on the same page**. We refined the wording of our mission, vision and core values. We **clearly stated three major goals**, and the supporting objectives and strategies to accomplish those goals.

Most important to me are the **annual work plans** where we list the specific strategies, the individuals leading them, the specific completion date, and resources required to accomplish the strategy. Because it is expected that these annual work plans will be updated each year, the strategic plan truly becomes a **"living, breathing document" and addresses those strategies that are most important each year**. It also **drives our budget**. The plan is not a hefty binder on a shelf, never to be seen once placed there. It is succinct and will be consulted and modified on an annual basis as a matter of policy.

- Commissioner Jon Pike



FAQs

What agencies need a plan?

- A strategic plan is beneficial for all agencies
- Executive branch agencies reporting to the governor are required to have a strategic plan



FAQs

How closely do plans need to follow the recommended format?

- Agency strategic plans should include all of the components in the [GOPB Guide to Strategic Planning](#)
- Agencies can add addendums to current, recently created plans to fulfill this requirement
- *Required items: Performance measures, specific [equity goals](#), anticipated budget requests, legacy projects (if applicable)*



FAQs

What if my agency is too big/too small to have a strategic plan?

- Large agencies could have a plan with a few goals for the agency as a whole as well as strategic plans for each division
- Large agencies could have a single overarching goal and one goal for each division
- Very small agencies still benefit from the planning process and having a strategic plan. The process will likely be simplified and the plan will probably be shorter
- Agencies have some flexibility in making a strategic plan that makes sense for each of them



FAQs

Who will evaluate the plans?

- Agencies evaluate their own plans to make sure required items are included and the format is generally followed
- GOPB analysts look at agency strategic plans to evaluate budget requests and performance measures, and can give input on other parts of the plan too
- The GOPB planning team gives assistance throughout the planning process if asked, and gives feedback on draft plans



FAQs

My agency needs help, what support is provided?

- The GOPB Guide to Strategic Planning is the primary resource with lots of examples and a step by step explanation of the plan creation process
- GOPB can provide an initial consultation and be a resource for questions along the way. Additional help may be available as well, depending on timing
- GOPB reviews draft plans to offer feedback



FAQs

What comes next?

- Send your strategic plan to your GOPB analyst if you have not already
- Keep your GOPB analyst posted on how the planning process is going
- Send strategic plan draft and finished product to ecurtis@utah.gov, tanderson1@utah.gov, and your GOPB analyst
- Additional optional Q&A sessions will be held in January and April



Strategic plan examples

- Insurance Department
- Department of Agriculture and Food
- Department of Alcoholic Beverage Services
- Governor's Office of Planning and Budget



Resources

- [GOPB Guide to Strategic Planning](#)
- [Suggested Timeline](#)
- [Toolkit for Equity and Opportunity-minded Decisions & Policies](#)
- Your [GOPB Analyst](#)
- GOPB Planning Contacts:
 - Evan Curtis ecurtis@utah.gov
 - Terrah Anderson tanderson1@utah.gov
 - Laura Hanson laurahanson@utah.gov

QUESTIONS



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