



GOVERNOR'S OFFICE OF Planning & Budget

Agency Strategic Planning

Terrah Anderson
May 22, 2024



2024 Information Sessions

January 10, 1:15pm

New required elements

March 20, 1:00pm

Customer Experience, mission statements, work plans

April 22, 10:00am

Clear goals

→ May 22, 1:00pm

Draft review and budget process

June 5, 11:00am

Open hour for questions

September 5, 1:00pm

Guest presenter: How auditors use strategic plans

October 29, 1:00pm

Evaluation, implementation, and next steps



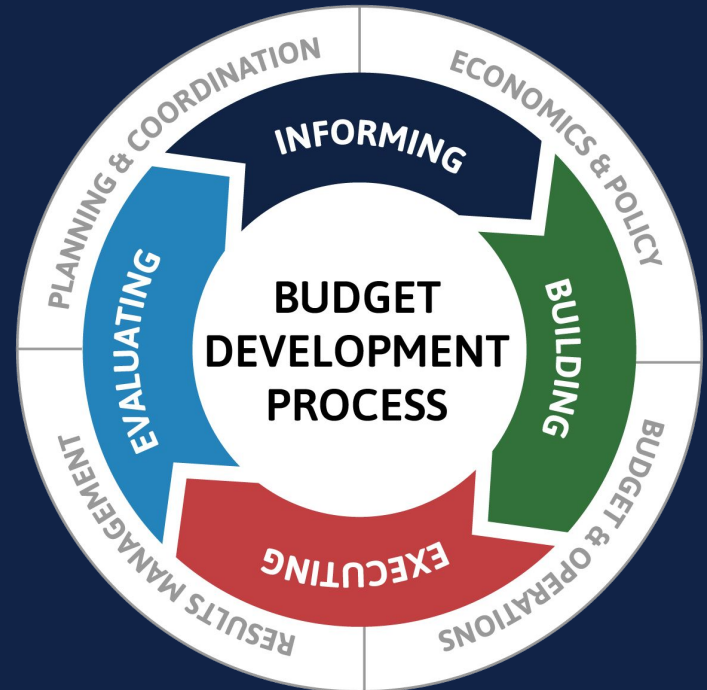
Agenda

- **How budget analysts use strategic plans** - Evan Curtis, GOPB
- **Agency strategic plan highlights**
 - Online dynamic strategic plan - UDOT, Patrick Cowley
 - Creating and implementing the strategic plan - VMA, Gary Harter



Strategic Planning: 2024 Goals

1. Emphasize the importance of having and using a strategic plan
2. Strengthen the connection between quality strategic planning and budgeting / budget requests
3. Improve quality of strategic plans





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How Budget Analysts Use Strategic Plans

Evan Curtis
May 22, 2024



The Strategic Plan and Budgeting

- *Why budgeting?*
- *Why now?*
- *How do budget analysts use agency plans?*
- *How should agencies use their plans in budgeting?*



Why budgeting matters?



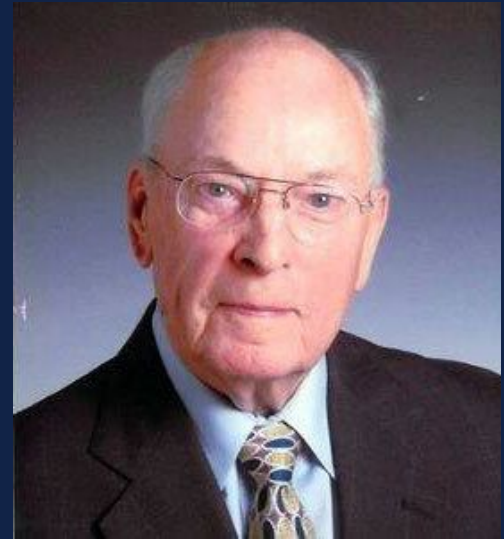
Budgets implement policies and plans



Why budgeting matters?

“Don’t tell me where your priorities are. Show me where you spend your money and I’ll tell you what they are.”

James W. Frick (1924–2014)





Why budgeting matters?

~~“Don’t tell me where your priorities are in your strategic plan; and then show me where you want to spend state tax dollars~~ ~~your money and I’ll tell you what they are.”~~

*~~James W. Frick (1924–2014)~~
Evan Curtis - Budget Analyst*



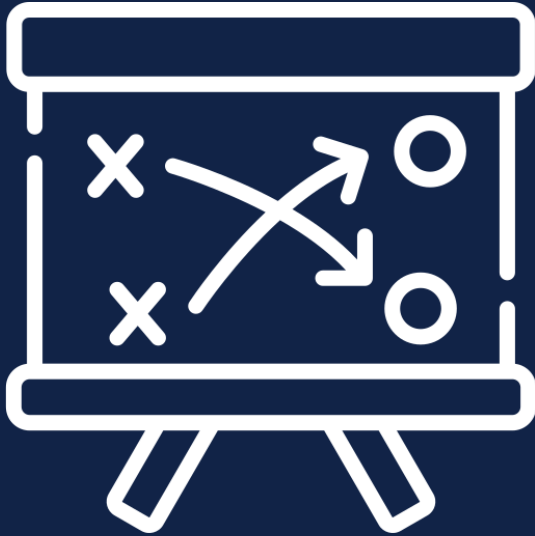


Why Now? Budget Process Timeline

- *July 1* - Strategic Plans Due
- *Late June/early July* - Budget Guidance released
- *July - Aug* - Agency meets with GOPB
- *Early Sept.* - Budget requests due
- *Late Sept.* - Agency hearings with LG/GOPB
- *Early Dec.* - Governor releases budget recommendations
- *January* - Agency presentations to legislature



Why Now? Budget Process Timeline



Plan First
(Strategic Plan)



Then Execute
(Budget)



How analysts use your plans



- Overview of the agency
- Understand the direction, priorities and long-term goals of the agency
- Policy Alignment
- Budget Justification
- Performance Evaluation
- Policy Development
- Long-term awareness



How analysts use your plans

- **Agency Overview:** The strategic plan should provide a new budget analyst or legislator with a straightforward understanding of your agency and mission.
- **Strategic Direction, Priorities, and Goals:** provides information on the big picture direction, priorities, and goals that the agency is focused on.



How analysts use your plans

- **Policy Alignment:** assessing whether an agency's strategic plans align with broader state policy goals and directives set by both the governor and legislature.
- **Budget Justification:** useful context for evaluating budget requests so funding recommendations align with the agency's mission and strategic objectives.



How analysts use your plans

- **Performance Evaluation:** A robust strategic plan includes performance metrics and targets. By comparing actual performance against stated goals analysts can gauge an agency's efficiency and effectiveness and try to ensure budget requests and recommendations align with state and agency performance initiatives.

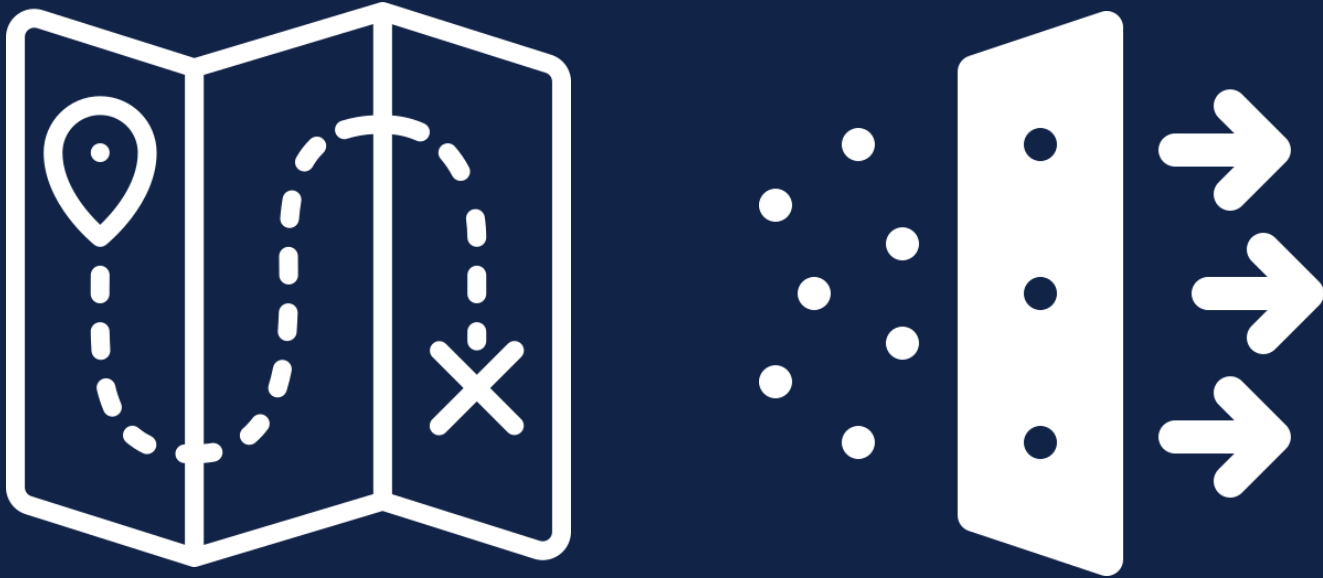


How analysts use your plans

- **Policy Development:** Agency strategic plans help shape collaborative policy development and legislative initiatives by identifying gaps or focus areas.
- **Long-term needs:** reveals long-term needs or trends that are beyond the budget horizon



Two key roles of a strategic plan



The strategic plan should serve as both a guide and a filter for budget requests.



How objective are you?



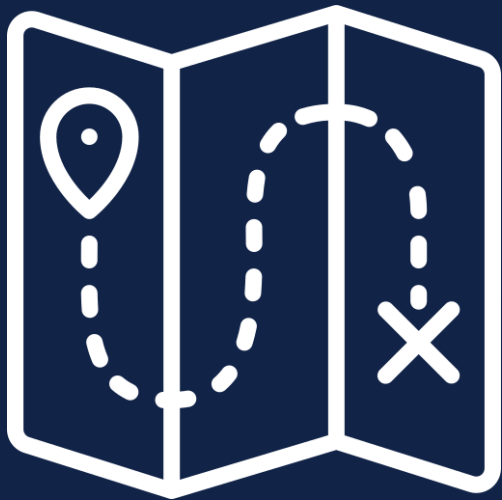


How objective are you?





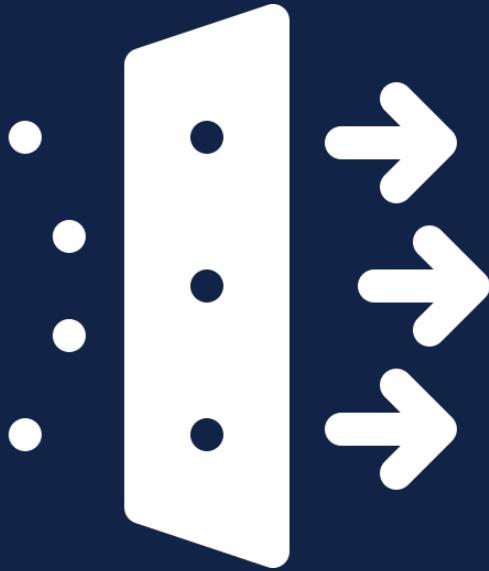
A guide...



- Higher-level, primary direction and focus
- Strategic plan can help identify gaps & next steps
- Budgets provide the means to implement them
- Reveals long-term needs or trends



A filter...



- In a fiscally constrained world, the plan can help identify and filter out lower-priority items that don't align with core agency objectives.



What makes a good request

- First - understand and communicate *the problem*
- Second - understand and communicate *the solution*
 - Outcome based
 - Tied to strategic direction
- Third - Consider *context*
 - Audience
 - System
- Fourth - Communicate! Tell your story!

QUESTIONS



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Strategic Plans: Purpose

Strategic plans:

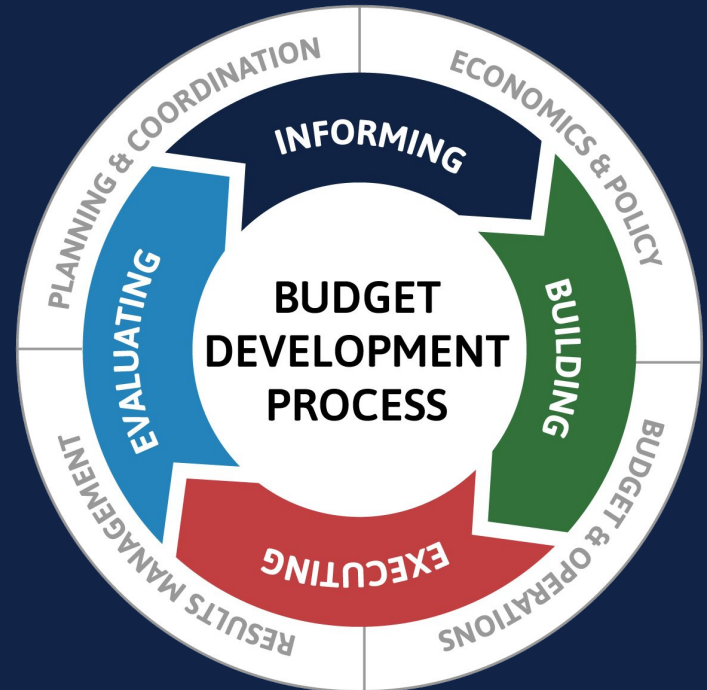
- Communicate agency work and vision
- Promote effective work
- Improve strategic budgeting
- Facilitate performance management





Strategic Planning: 2024 Goals

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Agency strategic plan highlights

1. Online dynamic strategic plan

UDOT, Patrick Cowley

2. Creating and implementing the strategic plan

VMA, Gary Harter



Questions for you -

- Quarterly report strategic planning question - how was it?
- Annual work plans

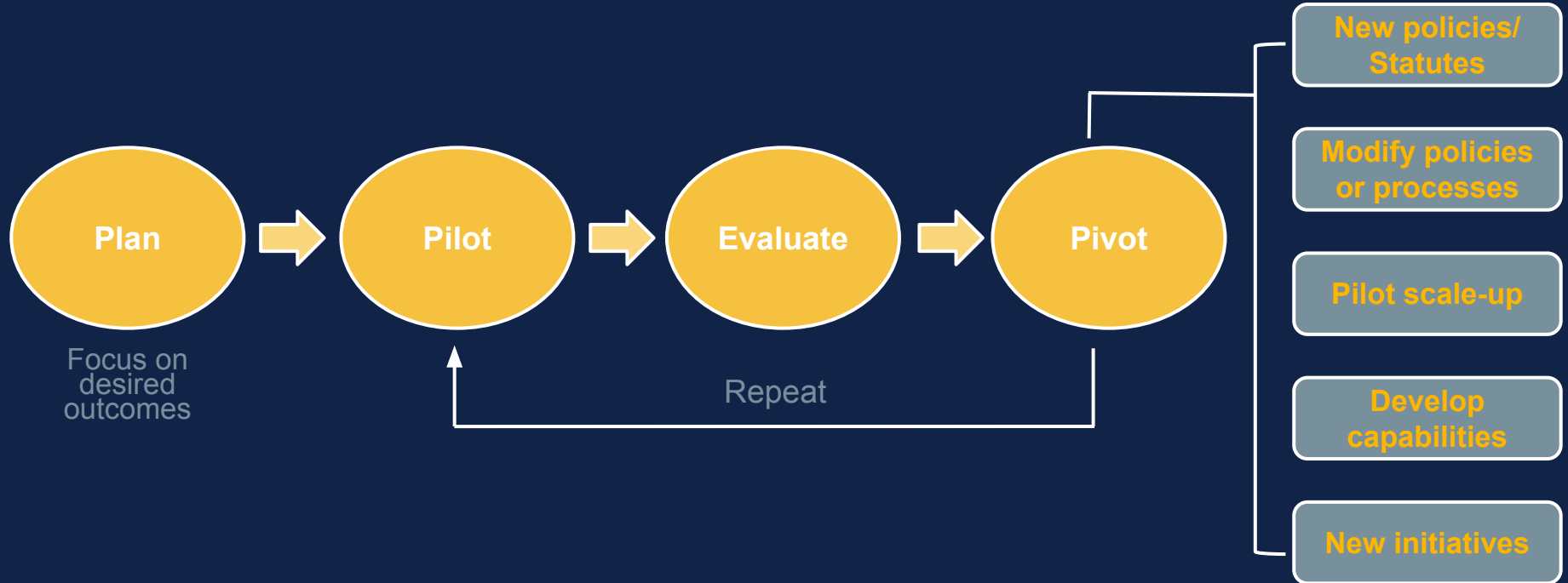


Looking to 2025

- Continue with quarterly information sessions, highlight agencies and using the plan
- No new requirements
- Consider division plans
- Consider employee goal alignment, performance plans
- Continue working with partners: CX, OLAG (guest presenter), etc.
- Focus on implementation and efficacy, evaluation of progress



Evaluate and Modify Through Use





Request: Coordinate with Internal Team

Agency strategic plan

Performance measures

CX data

Quarterly reports

Performance evaluations

Governor's priorities

Strategic budgeting



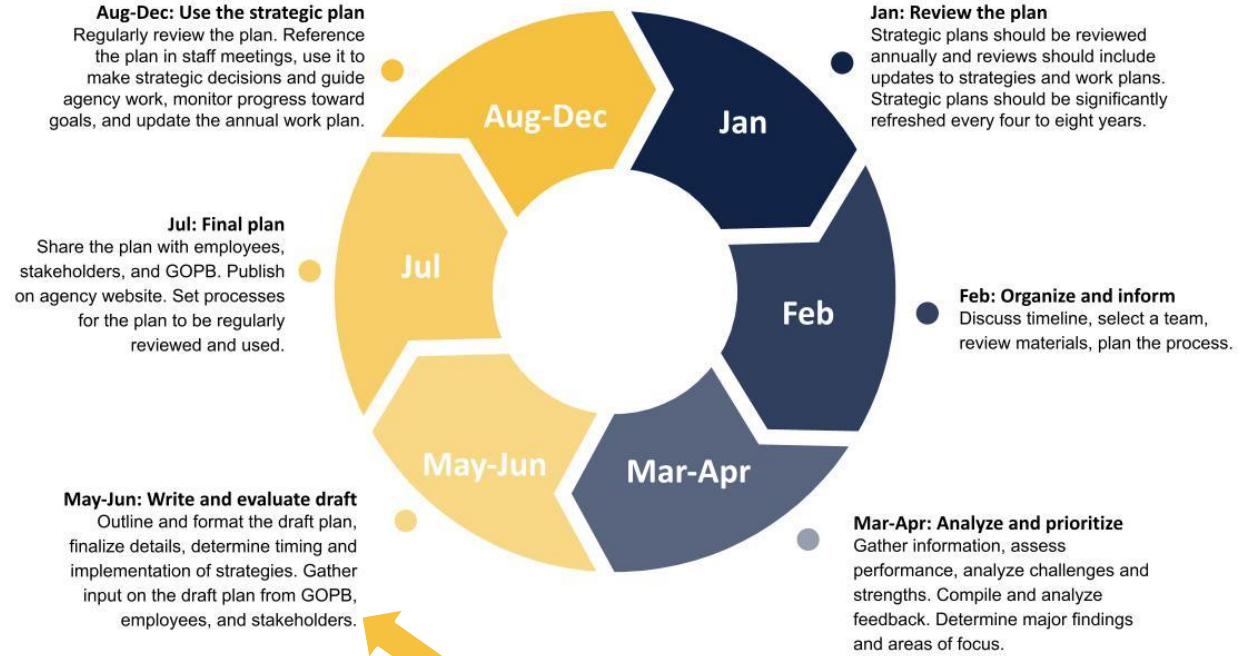
Draft plans due:
June 3

Final plans due:
July 1

Include new items,
minor updates

Significant update
every 4-6 years

AGENCY STRATEGIC PLANNING CYCLE





Agency Strategic Planning at GOPB



Laura Hanson

laurahanson@utah.gov
State Planning Coordinator
Managing Director of Planning
Coordination



Terrah Anderson

tanderson1@utah.gov
Budget and Policy Analyst
Strategic planning lead



Your GOPB analyst

QUESTIONS



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