**Updates to the 2012-2014 Strategic and Program/Service Area Plans**

Agencies are to update 2012-2014 Strategic and Program/Service Area Plans to reflect changes enacted by the 2013 Session of the General Assembly by **May 31, 2013**. Agencies should ensure that plans reflect current/actual services and capabilities. Upon completion and publishing of these updates, agencies will begin work to update Executive Progress Reports. A tentative calendar of all performance management related activities for the remainder of the 2012-2014 biennium is listed below.

The Department of Planning and Budget (DPB) will hold two webinars to address any policy or technical issues. These webinars will be held at 2:00 p.m. on Wednesday, May 8 and Wednesday, May 22. Webinar dial-in information will be sent via separate message closer to the actual Webinar.

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| **Event** | **Tentative Due Date** |
| Update 2012-2014 Strategic and Program/Service Area plans to reflect 2013 Session of the General Assembly | May 31, 2013 |
| Report Q4 and annual measure results for FY 2013 | August 15, 2013 |
| Update Executive Progress Reports | August 16, 2013 |
| Create 2014-2016 Strategic and Program/Service Area plans | Spring 2014 |

**Changes/updates at mid-biennium**

Agencies are permitted to update all aspects of their agency strategic plan and program/service area plans to reflect current services, primarily actions taken by the 2013 General Assembly. This is not the opportunity for wholesale changes to your plan or to address any underperforming areas. Agencies will have the opportunity to re-evaluate performance in Spring 2014 with the development of the 2014-2016 biennial Strategic and Program/Service Area Plans.

Provided below are some of the primary areas agencies should assess when performing this update:

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| *Financials – must be updated in the agency strategic plan and in program/service area plans* |
| * You must use the “changes to base budget” to reflect ALL budgetary actions from the 2013 General Assembly Session. You must do this in the agency strategic plan and all program/service area plans. Your totals should balance to the new chapter, please contact your DPB budget analyst with any questions/concerns. * Your base budget is locked. “Changes to base budget” is the only editable field in the table. * You should update narrative to accurately reflect your current budget. * You can use report BD 1.17 to verify your agency’s base budget. Please note: You need to change the budget round to “initial bill.” * You can use report BD 1.56 to verify base budget details at the service area level. * You must “save” on the “financials” screen and then “submit for review” via the “strategic plan status” module for these updates to take effect. |

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| *Measures – what can be updated?* |
| * Updates to correct historical measure data. |
| * Updates to measure titles to more accurately reflect what the measure is measuring. |
| * Updates to measure attributes to more accurately reflect what the measure is measuring (e.g. updating your data source and calculation to be more specific). |
| * The elimination of a measure due to a change in agency business practices or the elimination of a program/service. |
| * The addition of a measure due to a change in agency business practices or the addition of a program/service. Additions will not show up in the drop down list or the EPR until the plan is submitted for review and published by your DPB analyst You must “load” each individual measure and “save” each individual measure that you are editing on the “measures” screen within the agency strategic plan or program/service area module and then “submit for review” via the “strategic plan status” module for these updates to take effect. * If you have marked a measure for deletion, it will not actually “go away” until the 2014-2016 biennium. If it is marked for deletion, it will not show up in any public report/Web site. * PLEASE NOTE: You must notify your DPB analyst via email of any changes, additions or deletions of measures. * PLEASE NOTE: These changes should be made in either the agency strategic plan or the relevant program/service area plan, NOT the measure results module. The measure results module is for reporting current data results only. |

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| *Customers* |
| * If you are adding a new customer to a program/service area plan, you MUST select a “pre-defined customer” before saving your plan. Failure to select a “pre-defined customer” first will result in a system hard stop, or a loss of your edits/updates. |

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| *Narratives* |
| * Please fix grammatical and spelling errors. * Reflect any reorganization that will go into effect prior to the end of the 2012-2014 biennium. * Updates to reflect current/actual services and capabilities. |

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| *Executive Progress Reports (EPRs)- Remember your strategic plan “feeds” several fields in EPR* |
| * Pay close attention to performance measures that you are populating in the “performance highlights” section of the EPR. Make sure that targets and preferred trends are reasonable. * Look at your customers to make sure they reflect your agency’s main customers. |

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| *Other reminders* |
| * Select the “2012-2014 Biennium.” * Save your work! The system times out after 20 minutes. Save often! * Use the “strategic plan status” screen to submit your changes to your DPB analyst. * Let your DPB analyst know when you have submitted your updates for review. * Do not use the comments feature. |