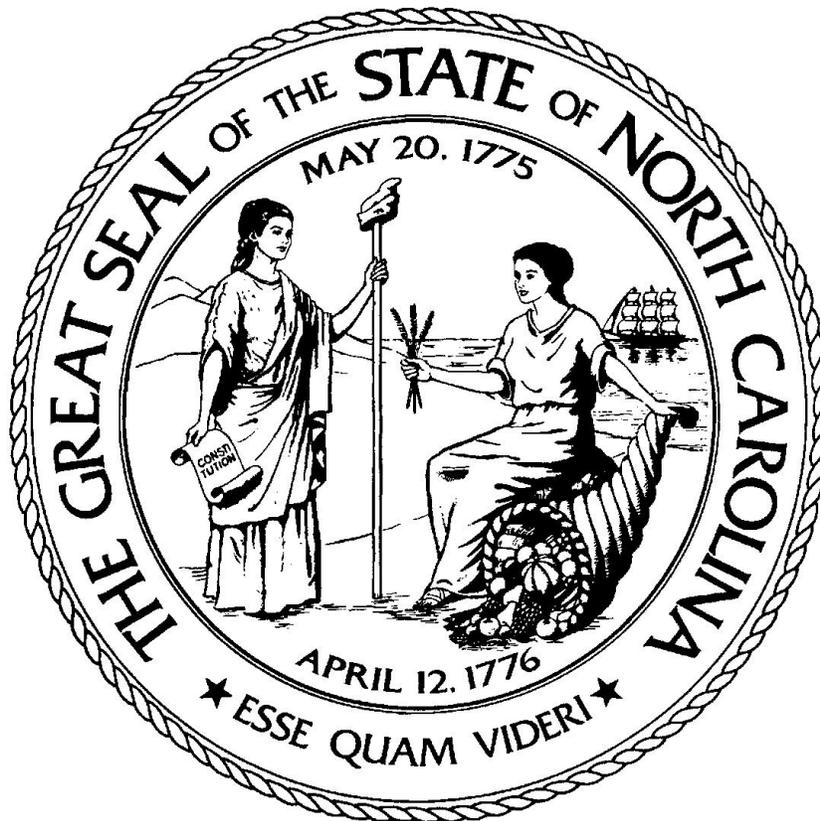


North Carolina

Strategic Planning Guidance

2023 – 2025



Office of State Budget and Management

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1. Introduction

The Office of State Budget and Management (OSBM) updated the strategic planning guidance for the 2023-25 fiscal biennium and requests that agencies submit a 2023-25 strategic plan which reflects their current goals, programs, and operations. This cycle, OSBM revised strategic planning guidance documents to encourage the incorporation of diversity, equity, and inclusion efforts, facilitate quarterly interagency discussions on strategic plans, and develop priority questions as part of their agency plans.

To meet Governor Cooper's priority to ensure an effective, accountable, and well-run state, all strategic plans should continue to:

- Demonstrate how your agency meets the needs of North Carolinians and stakeholders;
- Chart a long-term direction for your agency and the allocation of resources;
- Align agency goals, program objectives, and individual expectations and results;
- Consider the vision and priorities of the Administration;
- Establish a mechanism for evaluating progress and continuous improvement.

Agencies are required to submit strategic plans as part of the budget development process. Budget expansion requests should support goals included in the agency's strategic plan to be considered in the Governor's 2023-25 recommended budget. Please note, the Department of Information Technology will continue to issue separate guidance for the required agency IT plan. Your IT plan should align with the mission, goals, and objectives of your strategic plan and identify any planned IT projects that will require an expansion request.

This document and a strategic plan template can be accessed on [OSBM's website](#). Both documents incorporate feedback received from North Carolina state agencies and best practices from several other States offering strategic planning guidance. For more examples of strategic planning components, formatting suggestions, or drafting process steps, see the guidance documents of [Georgia](#), [New York State](#), and [Colorado](#), respectively.

OSBM's guidance and template are a suggested process and format for organizing your agency's goals, objectives, performance measures, and strategies. If your agency has a preferred format, you are welcome to deviate if your plan contains the same basic elements.

Agencies should submit an updated plan electronically to their Budget Development Analyst and to StrategicPlanning@osbm.nc.gov by May 1, 2023. The plan will then be made publicly available on OSBM's website.

2. The Drafting Process

2.1. What is Strategic Planning?

Strategic planning is a long-term, future-oriented process of assessment, goal setting, and decision-making. A strategic plan sets the course for what an agency will do over the next two to five years and how it will achieve its desired results. At its core, strategic planning is about influencing the future rather than preparing or adapting to it.

2.2. How do I draft a Strategic Plan?

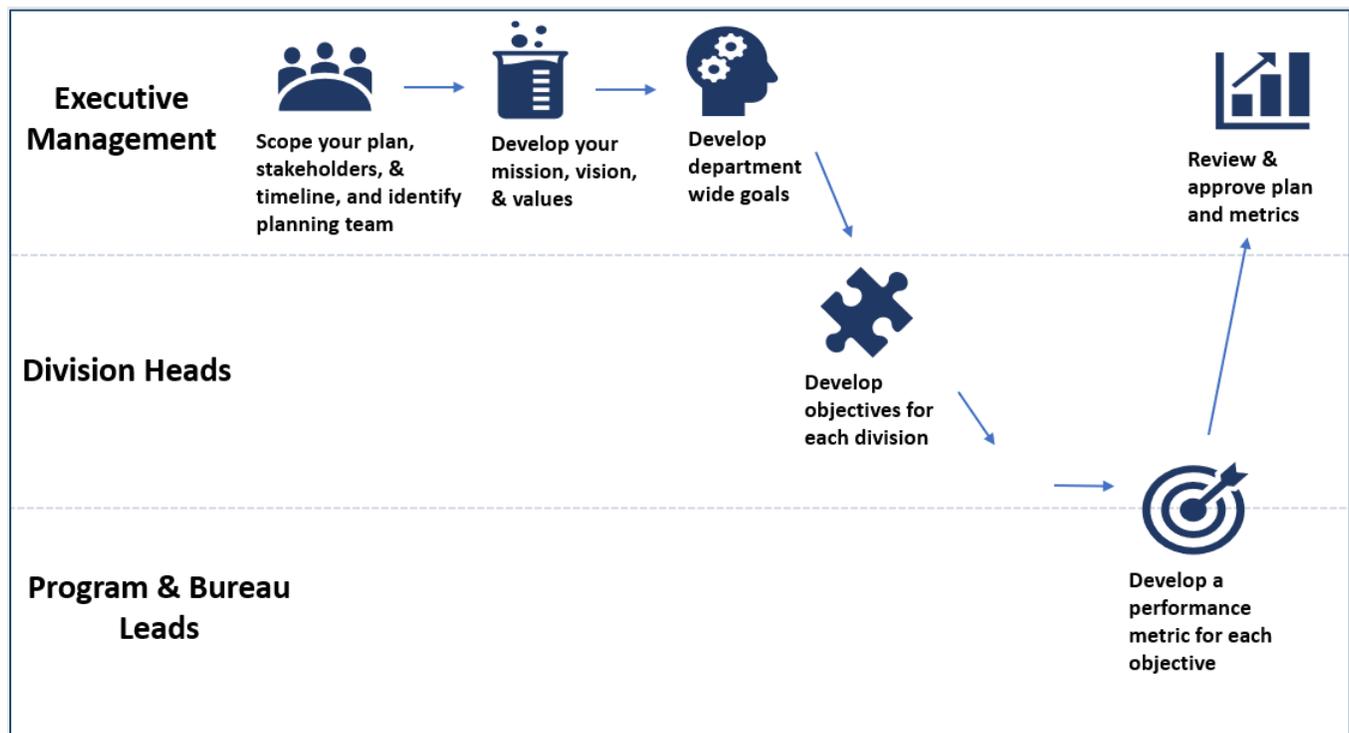
At the highest level, the strategic planning process in North Carolina state government is driven by the four questions below:

1. *Where are we now?*
2. *Where do we want to go?*
3. *How do we get there?*
4. *How do we evaluate our progress?*

These basic questions prompt agencies to assess their current environment, develop what they wish to achieve, determine how to achieve it, and track progress along the way.

The planning process should incorporate a broad range of perspectives from across an agency. An agency's strategic plan should not be the product of an individual or a small group of individuals; rather, it should emerge from a collaborative effort driven by the top executive with contributions and support from employees.

The process map below illustrates a recommended flow of work when drafting your agency's strategic plan.



2.3. Step-by-Step Guide

The table below captures the steps OSBM recommends that agencies take to complete their strategic plans. Each step has an owner, recommended practices to achieve that step, and questions agencies can use as a guide to draft and finalize each component of the plan. Please note that all steps are optional and should be used as a guide.

Step	Owner	Recommended Practices	Questions to Answer when Drafting
1 Plan Your Plan	Executive Mgmt.	<ul style="list-style-type: none"> Identify Strategic Plan Stakeholders; Plan Longevity; Drafting Lead or Drafting Team; Timeline to Draft plan 	<ul style="list-style-type: none"> Who is our plan for & How many years will our plan cover? Who will draft the document & what is the completion timeline?
2 Develop Mission, Vision, & Values	Executive Mgmt.	<ul style="list-style-type: none"> Often established or mandated Survey to Division Leads, Program Leads, or entire staff based on org size 	<ul style="list-style-type: none"> What do we do that no other organization can do? Who are our "customers"? How does this impact what we do?
3 Conduct Environmental Scan	Executive Mgmt.	<ul style="list-style-type: none"> SWOT/ Survey to Division Leads, Program/Bureau Leads, or entire staff 	<ul style="list-style-type: none"> Who are my direct customers/ stakeholders/beneficiaries? What factors drive my customer base? How do we account for these?
4 Develop 3-5 Department-wide Goals	Executive Mgmt.	<ul style="list-style-type: none"> Affinity Mapping to organize & prioritize SWOT/survey responses Assign a goal for top priority issues 	<ul style="list-style-type: none"> Which key efforts can we take to pursue our Mission ? How do we support statewide priorities through our plan?
5 Develop Objectives for each Division	Division Heads	<ul style="list-style-type: none"> SWOT/Survey to Program Leads Affinity Mapping Assign an Objective for each priority 	<ul style="list-style-type: none"> Is the Objective "SMART" Is there alignment between the Goals & the Objectives?
6 Develop Performance Metrics	Division Heads & Program Leads	<ul style="list-style-type: none"> Working Session with Division Heads & Program/Bureau Leads 	<ul style="list-style-type: none"> What data do we need to see if we are achieving our Objectives? Do we have the right infrastructure to collect & analyze data?
7 Review & Approval of Plan & Metrics	Executive Mgmt.	<ul style="list-style-type: none"> Iterative Revision process with Division Heads 	<ul style="list-style-type: none"> Is there alignment between the Goals, Objectives, Strategies, & Tasks? Are Objectives "SMART"

If your agency is interested in learning more about the recommended practices documented above (e.g., Environmental Scan, Strengths/Weaknesses/Opportunities/Threats (SWOT), Affinity Mapping), **please email your OSBM Budget Development Analyst or sign up for the [Performance Management Community of Practice](#).**

2.4. Developing Agency Priority Questions

A challenge of strategic planning is that there is often uncertainty about the causes and consequences of an emerging issue, how policies and programs are performing, and/or uncertainty about what changes to policy and programming will most effectively advance an agency's mission.

It may be unclear, for example, whether program A or program B has a higher return-on-investment, or what are the impacts of regulation W, or how to best redesign and simplify an administrative process Z. If you had additional evidence to address such uncertainty, it could change whether your plan prioritizes A or B, or how budgetary resources are allocated toward W, or whether Z reforms are pursued or not—it could change, in other words, how you set and manage against goals, objectives, strategies, and tasks.

The Agency Priority Questions section of the Strategic Plan is a prompt to identify 3-5 priority needs for additional evidence, which in turn can inform planning for how to generate that evidence. The motivation for including this section is that strategic planning is not only a moment to set priorities based on the best available evidence of today, but it is also a key moment to invest attention and resources toward the generation of evidence that will be needed to design and implement effective solutions in the future.

Questions may be of varied levels of specificity, depending on your agency's needs.

Examples of Agency Priority Questions:

1. How much do each of the job training programs supported by Workforce Grants improve employment rates and average salaries within two years?
2. How much do NC teen court programs reduce recidivism among youth under 18?
3. What issues will the expanded use of digital currency and peer-to-peer cash apps create in terms of the Department of Revenue's ability to enforce tax compliance?
4. How could the application process for licenses and permits be most simplified?
5. Which transportation strategies will most effectively reduce greenhouse gas emissions?
6. What are the population exposure levels and health effects of environmental contaminants?

More examples of questions can be found on the [North Carolina Project Portal](#). Another resource for inspiration is [Evaluation.gov](#), where you can find examples of questions with the larger learning agendas of federal agencies. You might consider not only writing the 3-5 priority questions, but also adding a brief explanation for why the answers would be important and what decisions they will inform.

OSBM is available to assist agencies in developing their Agency Priority Questions. If you would like assistance or to discuss priority questions, sign up for a consultation on the [OSBM website](#). OSBM staff are ready and willing to help identify, and articulate priority questions.

2.5. Agency Strategic Plan Template

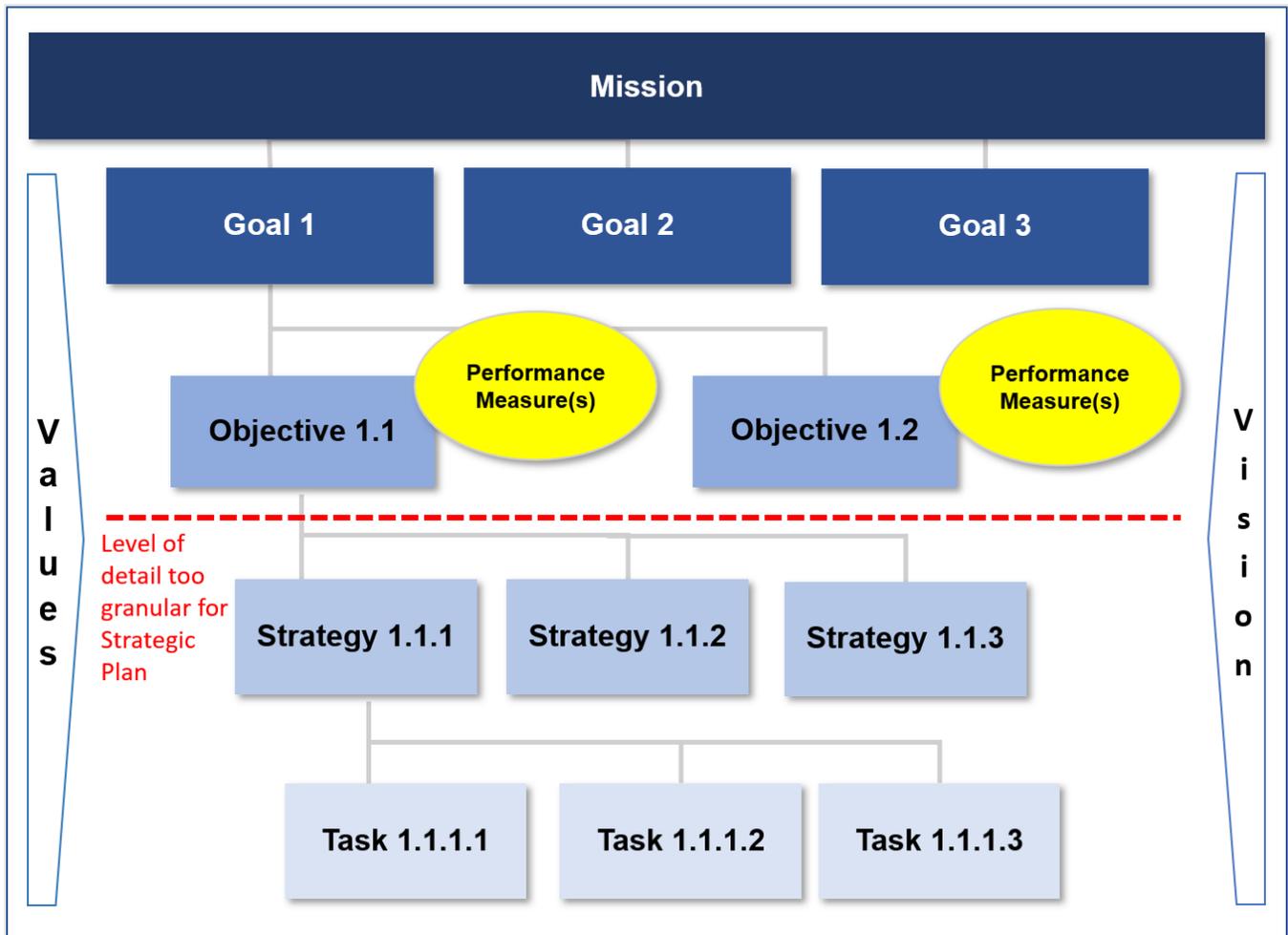
OSBM provides a strategic plan template for an agency's use and/or reference, which can be found on [OSBM's website](#). Agencies may vary from this template if the same basic information is provided. The following sections provide descriptions of the strategic plan components captured in that template and things to consider when crafting each planning element.

3. Strategic Plan Components

3.1. The Differences between Goals, Objectives, and Strategies/Tasks

A goal is high-level and outcome-oriented but not overly specific (no targets). Objectives are the progress needed to achieve a goal and should be specific, measurable, attainable, relevant, time-bound, inclusive, and equitable. Strategies state the action steps the agency will take to achieve the goal and its measurable objectives. Strategies are actions and thus typically start with a verb.

See the graphic below for an illustration of how plan components can work together.

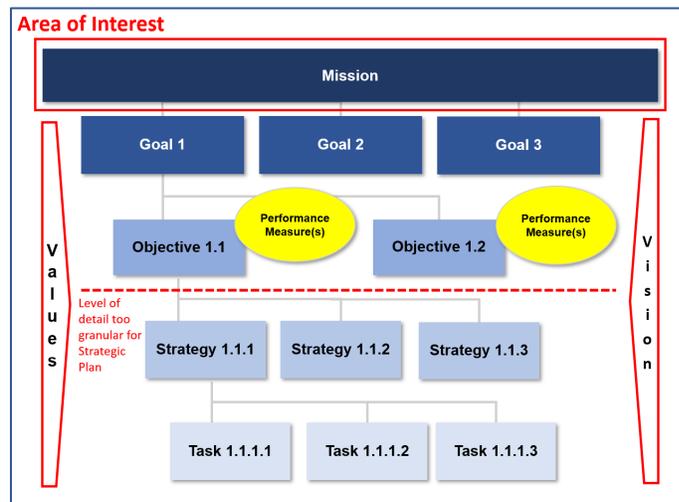


Strategies and tasks, although vital to the implementation of any Strategic Plan, are more specific actions, more operation-related, and more subject to change than Strategic Plan components. To best facilitate discussions at the agency-to-agency level, we've removed strategies and tasks from our Strategic Planning Template. That said, documenting your strategies and tasks in an Annual Plan can be a very useful operational resource.

3.2. Mission, Vision, and Values

The **mission statement** is the common thread that describes an agency’s basic purpose and concisely identifies what the agency does, why, and for whom. It reminds everyone, including the Governor, legislators, and the public, of the unique purposes promoted and served by the agency and provides a clear answer to the question, “Why do we exist?”

Every strategic planning cycle, your agency should review its mission statement and determine if revisions are required. As part of the review process, you should examine your agency’s responsibilities and authorities as spelled out in North Carolina statute. It may be necessary to develop a new mission statement; however, an agency will most likely only need to make moderate revisions (or no changes at all) since mission statements often remain appropriate for long periods of time and, in the case of state government, are often mandated by statute.



A mission statement is easy to understand and should answer the following questions:

- Why does our organization exist?
- What do we do that no other organization can do?
- Who are our customers? Stakeholders? Beneficiaries? What implications does this have for how you do what you do?
- What major activities or outcomes are we responsible or accountable for?
- Is our mission consistent with the agency’s enabling statute?

Examples of a Mission Statement:

Use: *The mission of the XYZ agency is to provide access to affordable, quality health care to North Carolinians through effective planning, purchasing, and oversight.*

Not: *To assist our customers by providing leadership, and reliable business services.*

A **vision statement** is a coherent and powerful statement of what an agency wants to be in the future. A vision statement articulates a view of a realistic and creditable future for an agency and helps form the foundation for strategic plan development. It helps agency employees articulate what the agency wants to achieve.

There are several key elements of quality vision statements, which include but are not limited to:

- Setting high standards and ideals;
- Identifying a clear purpose and direction;
- Strengthening enthusiasm and commitment;

- Promoting change;
- Reflecting uniqueness.

Note: A vision statement differs from a mission statement in that a mission statement tells who or what an agency is now, and a vision statement tells what an agency hopes to become in the future.

An effective way for an agency to develop a vision statement is to answer the following question:

- What would our agency look like in ten years if we are successful between now and then?

The answer should be a description of what the agency will become and should portray an image of the ideal future for the agency. It is not a description of the method or process to get to that ideal.

Examples of a Vision Statement:

Use: *The Agency XYZ will be a nationally recognized leader for organizational excellence and customer service.*

Not: *To assist our customers by reliable business services.*

Values are the principles that govern behavior within an agency. They effectively communicate expectations of internal and external interactions, business conduct, and day-to-day operations. Consistent with an agency's mission and vision, values should be integrated into all levels and functions of an agency to influence behavior, provide a moral compass, and help employees make tough decisions. Effective values are clear, succinct, and widely communicated. They remain consistent and relevant over long time periods and provide substantial guidance for carrying out individual responsibilities.

Values are typically listed as single words, but phrases or sentences that describe the value may help explain their importance to employees and others. While many values may be applicable to define an agency's work and culture, establishing four to eight core values is usually sufficient and easy to communicate. After values are finalized and approved, they should be visible throughout an agency and reaffirmed by leadership and management on a continuous basis.

Examples of Agency Values:

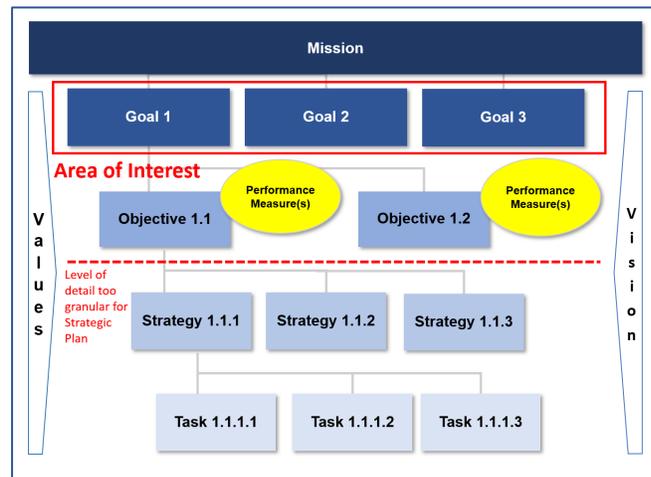
Use: *Teamwork - We will succeed through effective communication and trust.*

Not: *Excellence*

3.3. Agency- or Departmentwide Goals

Goals are broad statements that define what an agency wants to achieve over a long period of time. They stretch and challenge an agency but are realistic and achievable, and help provide answers to the question, “Where do we want to be?”

The strategic planning process requires agencies to identify the critical issues or “challenges” facing the agency. These challenges are the foundation upon which the agency develops its goals.



The development of agency goals is one of the most critical aspects of the planning process because goals chart the course for the agency and broadly illustrate how an agency will achieve its mission and vision. The goal development process begins to focus the agency’s intentions on clearly defined actions.

Goals should:

- **Be customer focused**, i.e., derived from internal and external customer data included in an agency’s environmental scan;
- **Be clear and easily understood** by the public;
- **Address the primary issues** facing the organization;
- **Specific** to your organization;
- **Limited in number** to focus the agency on a manageable set of priorities. Although there is no established limit on the number of goals, best practice indicates that three to five goals are often desirable to clearly establish the agency’s direction and define priorities.

During the goal development process, an agency should answer the following questions:

- Are the goals in harmony with the agency’s mission and will they help fulfill the agency’s vision?
- What are the most important efforts we can undertake to pursue our mission?
- What are our weaknesses & how will we address them?
- Do the goals provide a clear direction for agency action?
- Do the goals align with the vision and following priorities of the Administration?
 - Positioning North Carolina to create new jobs and foster economic growth and recovery
 - Strengthening our education and workforce development systems to ensure students and jobseekers are prepared for the jobs of today and tomorrow
 - Promoting healthier, cleaner, and safer communities
 - Advancing equity and diversity

- Ensuring an effective, accountable, well-run state government

Examples of Goals:

Use: *Improve the customer experience for permit applicants.*

Not: *Improve customer service.*

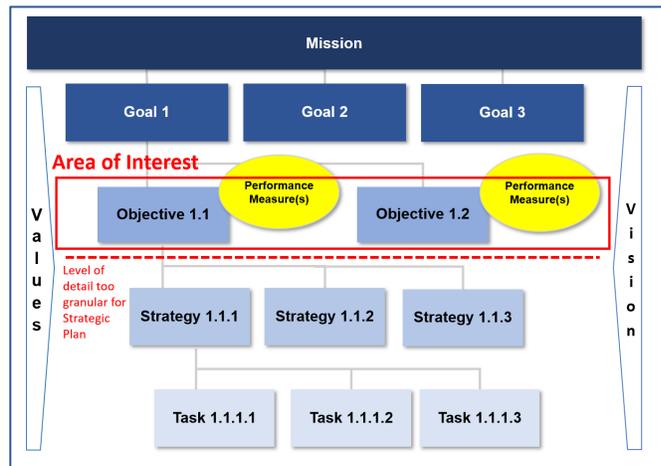
The goal development process will also likely uncover questions that, if answered, would further inform or support agency priorities. The documenting of these priority questions is explained in Section 2.4 of this document.

This cycle, we are encouraging agencies to incorporate **diversity, equity, and inclusion** into agency strategic goals. The definitions of diversity, equity, and inclusion, along with relevant examples, are provided in Section 3.6 to guide agencies when developing or incorporating those concepts into their goals and objectives.

3.4. Bureau- or Division-wide Objectives

Objectives are clear targets for specific action. Objectives are specific, quantified, and time-based statements that outline measurable steps toward achieving an agency’s goals. Objectives represent the extent to which agency goals will be achieved at the end of the period covered by the strategic plan. **One goal may have multiple objectives.**

Objectives should help prioritize resource allocation and shape agency actions. It is important that objectives be **Specific, Measurable, Achievable, Realistic, Timely, Inclusive, and Equitable (SMARTIE).**



The following questions should help an agency assess its objectives:

- **Specific:** Is the objective clearly related to the stated goal and does the objective clearly state what the agency intends to accomplish?
- **Measurable:** Can progress toward completion of the objective be measured? What measures are needed to track the achievement of each goal and objective?
- **Achievable:** Is the objective achievable? Does the agency have the resources necessary to achieve the goal?
- **Realistic:** Is the objective realistic? Has the agency considered all the challenges of completing the objective and the resources necessary to get it done?
- **Timely:** Does the objective have specific targets and time frames?
- **Inclusive:** Is the objective intentionally inclusive by actively bringing traditionally excluded individuals and/or diverse groups into activities?

- **Equitable:** Does the objective provide equitable outcomes by providing proportional resources in consideration of the unique experiences and barriers of individuals and/or communities impacted by the goal?

Measurable objectives are typically stated as “X as of Date becomes Y by Date,” where “X” is the baseline performance and “Y” is the target performance. Often, the “by Date” is the final year of the strategic planning cycle.

Examples of Measurable Objectives:

Use: Increase our customer survey satisfaction score from 80% “highly satisfied” to 95% “highly satisfied” by FY 2024-25.

Not: Increase number of customers surveyed from 80% to 95%.

The table below provides definitions of **diversity, equity, and inclusion (DE&I)** – along with relevant examples. This table should help guide agencies when developing or incorporating DE&I concepts into goals and objectives.

Term	Definition
Diversity	A wide variety of shared and different personal and group characteristics among human beings. Visible characteristics might be race, gender, and age, but also may include less visible characteristics like country of origin, ability, socio-economic status, sexual orientation, education, religion, life experience, gender identity, regional differences, or even personality style.
Equity	Proportional distribution of desirable outcomes (e.g., well-being, educational, economic, social, or political opportunities) across groups (e.g., race, gender, age, religion, diverse background, socio-economic status, sexual orientation, language barriers, disabilities, etc.). Sometimes confused with equality, equity refers to outcomes while equality connotes equal treatment. Where individuals or groups are dissimilarly situated, equal treatment may be insufficient for, or prevent, equitable outcomes.
Inclusion	Authentically bringing excluded individuals and/or groups into activities. This requires active, intentional, accessible, and ongoing engagement with diverse people, practices, and communities, as well as creating and maintaining a culture where individuals of diverse backgrounds feel included, comfortable, and confident to be themselves in their daily experiences in all areas of life. Inclusion does not naturally result from diversity. You can have a diverse group, but

this does not mean that everyone feels respected, supported, welcomed, or valued.

State Agency Examples of DE&I Goals & Objectives		
Agency	Goal	Objective(s)
DHHS	<u>Goal 1</u> : Advance health equity by reducing disparities in opportunity and outcomes for historically marginalized populations within DHHS and across the state.	<p><u>Objective</u>: Create a culture of and structure for equity across the Department.</p> <p><u>Objective</u>: Use data to hold ourselves and our partners accountable for equity.</p> <p><u>Objective</u>: Mitigate barriers to equitable access of health services.</p>
DNCR	<u>Goal 4</u> : Promote diversity and cultural inclusion in departmental programs, recruitment, administration, and community engagement.	<p><u>Objective 4.1</u>: Diversify who we are (DNCR staff, boards & commissions appointees, support groups).</p> <p><u>Objective 4.2</u>: Diversify who we serve.</p>
OSHR	<u>Goal 1</u> : Embrace (recruit and retain) a workforce that reflects the state’s diversity.	<p><u>Objective 1.1</u>: Improve career/job awareness with the State of NC by increasing outreach efforts/partnerships with diverse groups that reflect the State’s demographics by 10% by June 30, 2024</p> <p><u>Objective 1.2</u>: Increase Diversity and Inclusion and Employee Relations training on current legal decisions, social issues, grievances, and ER activities each year open to EEO/ER or HR community.</p>
DEQ	<u>Goal 7</u> : Strengthen North Carolina’s infrastructure through thoughtful, strategic, and equitable investments in communities.	<p><u>Objective C</u>: Develop comprehensive communication strategy for education and outreach with local partners, impacted communities, and interested parties.</p> <p><u>7.C.1</u> Conduct outreach to environmental service providers and communities, especially small, rural, and historically underserved communities to ensure they are aware of funding and infrastructure improvement opportunities.</p>
DPS	<u>Goal 3</u> : Protect and engage with the public.	<u>Objective 2.8</u> : Promote equitable outcomes and access through our policies, procedures, and practices.

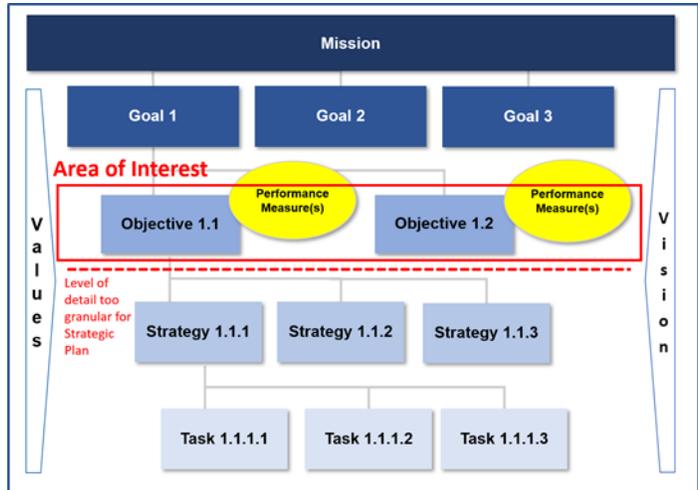
The objective development process will also likely uncover questions that, if answered, would inform or support agency priorities. Documenting these priority questions is explained in Section 2.4 of this document.

3.5. Performance Measures or Milestones

Defining “success” is key to developing and implementing an effective plan. To track progress towards the goals outlined in a strategic plan, the objectives presented should have **performance measures** that will inform whether objectives have been accomplished.

Measures should be useful for answering the following questions:

- Did we achieve the results that we expected, or did it produce results we didn’t want or expect?
- Should our strategies to achieve the objective be changed?



OSBM recommends that state agencies submit strategic plans that capture **objective-level performance measures** that clearly define the method and unit of measurement for a desired event. There are many different types of measures, and a combination of these may be needed to inform decision-making at different levels. While our performance measure terminology is not universal, the table below provides definitions and examples of the measures we typically encounter in an agency’s strategic plan.

Type of Measure	Definition	Examples
Outcome Measure	Measures the actual impact or effect on a stated condition or problem over a prolonged period (typically a year or longer).	<ul style="list-style-type: none"> • Reduction in fire deaths/injuries in a year • Percent of parolees not reconvicted within 5 years
Milestone	An event that is not easily quantified other than recognizing its completion or not.	<ul style="list-style-type: none"> • Create a training plan • Establish a baseline for future measures

While both types are acceptable, it is a best practice to have measures that include a target quantitative outcome. For example, a target quantitative outcome could be a 2% or greater reduction in transportation-related fatalities. In contrast, a milestone is a binary assessment of whether something happened and may be a necessary alternative to describe the progress of a particular effort. For example, completing and submitting a strategic plan on time is a milestone rather than an outcome. Performance measures with an associated target are generally more sophisticated and preferable to milestones which may serve an intermediate role prior to developing a quantitative performance measure.

4. Operationalizing Strategic Plans and Quarterly Reviews

To stay informed on plan progress, OSBM Budget Analysts will revisit your strategic plan and the assumptions you made while developing the plan at least once a quarter, as well as revisiting the entire plan annually. OSBM recommends reviewing your plan regularly because changes are periodically needed to reflect evolving conditions and to use learnings from collected measures on what's working or not working.¹

Quarterly Review (QR) meetings provide the opportunity for both agencies and OSBM to assess how those assumptions compare to the present reality. This assessment may enable agencies to adjust course, redistribute resources, and augment their plans to ensure targets are met.

Below you'll find a guide that may help your agency prepare to discuss strategic plans during QRs.

Quarter 1 Review (QR meeting hosted July-August)

- **Context:** Agencies have closed out the prior fiscal year and have begun implementing their newly drafted 23-25 Biennial Strategic Plans
- **Topics for discussion:**
 - Agency-wide priorities for FY 2023-24
 - Edits to the agency's prior year strategic plan
 - Top Goals and associated performance benchmarks
- **Your Budget Analyst may ask:**
 - *What are the new components of your agency's new Strategic Plan?*
 - *What are the top three goals in your agency's Strategic Plan?*
 - *Are there performance benchmarks for these goals? If so, what are they?*

Quarter 2 and Quarter 3 Reviews (QR meetings hosted October-November and January-February)

- **Context:** Agencies are looking forward to budget development and reviewing operational needs requests
- **Topics for discussion:**
 - A success and/or a challenge regarding one of your agency's Strategic Plan top-priority goals
 - Agency Priority Questions
- **Your Budget Analyst may ask:**
 - If you're sharing a success: *Are there any best practices that have contributed to the success of your agency's program/initiative that you can implement across other goals?*
 - If you're sharing a challenge: *How has your agency addressed this challenge? What are your agency's plans to address it going forward?*

¹ [Monitoring Your Strategic Plan-Quarterly Reviews and Annual Updates - Center for Simplified Strategic Planning \(cssp.com\)](https://cssp.com)

- *Your agency identified priority needs for additional evidence in your Strategic Plan. Do you have a plan to generate that evidence? If not, can we help you create one?*

Quarter 4 Reviews (QR meeting hosted April-May)

- **Context:** Agencies assess what in their Strategic Plans worked in the past year and what might need to change
- **Topics for discussion:**
 - Revisions to agencies' plans
 - Successes or challenges regarding all agency's Strategic Plan goals
- **Your Budget Analyst may ask:**
 - *What about your agency's Strategic Plan was or was not successful?*
 - *For successful components: Is your agency planning to continue with the same strategies for next year? Was this related to a milestone goal that has been achieved or is it a long-term goal?*
 - *For unsuccessful components: Why was this unsuccessful? Does your agency have any plans to address this?*
 - *Do you need to make any revisions to your biennial plan now that you are at the 1st year mark?*

5. Highlights, Collaborative Opportunities, and Priority Questions

The purpose of the “Highlights, Collaborative Opportunities, and Priority Questions” section of the OSBM Strategic Planning Template is to highlight what is working in your agency, learn about potential opportunities or collaborations your agency envisions, and document any identified questions that, if answered, would inform or support your agency’s priorities.

6. Strategic Plan Checklist

Your agency may deviate from the provided template, but please ensure all the following elements are included at a minimum:

- Mission* that states what you are doing and tied to statutory authority.
- Vision* that states what you seek to become.
- Values* that establish organizational principles.
- Goals* that clearly support the agency's mission and align with the vision statement.
- Objectives* that are measurable, time-based statements of intent that should be derived from and directly linked to the corresponding goal.
- Priority questions* of the agency that have been documented for future exploration.
- Performance Measures or Milestones* that clearly define the method and unit of measurement for evaluating progress toward your objectives.
- Does not capture *Strategies* or *Tasks*, which may be documented in an agency's annual Action Plan.

7. Timeline and Submission

7.1. Timeline

The option to submit an updated plan is due **May 1, 2023**.

7.2. Where to submit

Please email completed plans to your designated OSBM Budget Analyst(s) and StrategicPlanning@osbm.nc.gov.

7.3. Questions

For any questions about this guidance, the OSBM strategic plan template, or the strategic planning process, please contact your OSBM Budget Analyst(s) or email StrategicPlanning@osbm.nc.gov.