



**STATE OF NORTH CAROLINA
OFFICE OF STATE BUDGET AND MANAGEMENT**

BEVERLY EAVES PERDUE
GOVERNOR

ANDY WILLIS
STATE BUDGET DIRECTOR

September 29, 2011

MEMORANDUM

TO: Department Heads
All State Agencies

FROM: Andy Willis 
State Budget Director

SUBJECT: Agency Strategic Planning Guidelines

As part of Governor Perdue's ongoing effort to focus North Carolina state government on efficiency, accountability and results, it is necessary to continually maintain, refine and update agency strategic plans each fiscal year. Agencies subject to Executive Order 3 are required to review and submit their updated strategic plans annually to OSBM and the Governor's Policy Office. It is especially important to revisit agency plans in light of the FY 2011-13 budget to ensure agency goals and strategies are still achievable within given resources. Again, agencies are asked to ensure their goals are in line with the Governor's priorities:

1. Preserve and create jobs, jobs and more jobs.
2. Position North Carolina for economic recovery.
3. Assist small and rural businesses to stay in business and grow.
4. Ensure all students graduate Career and College ready.
5. Recruit and retain quality teachers and principals.
6. Turn around low-performing schools.
7. Restore public trust in government.
8. Enforce zero tolerance of fraud and corruption.
9. Do more with less.
10. Keep North Carolina safe.

If you are subject to Executive Order 3, please update your strategic plan to reflect budget, legislative or policy changes and to ensure the Governor's priorities are addressed. In addition, plans must include updated performance measure data, including data for the management goals and measures (Appendix III) called for in Executive Order 3. **Per Executive Order 3, plans must be submitted to Office of State Budget and Management (OSBM) and the Governor's Policy Office. Updated plans should be submitted by October 24, 2011.** Guidelines and a suggested template for strategic plan development are attached for your reference. Plans are not required to follow a strict template; however, in the future, OSBM will electronically collect strategic planning elements in the new budget system. Following the template will make future reporting easier.

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While Executive Order 3 does not apply to the Board of Governors of the University of North Carolina System, the State Board of Community Colleges, the State Board of Education, the Administrative Office of the Courts, or Council of State agencies, each is encouraged to participate. OSBM will continue to collect agency planning information (agency mission, goals, and measures) for the biennial budget and following the attached template will help you prepare.

The timeline for completion of 2012 agency strategic plans is as follows:

November 1, 2011 — Agencies submit their updated strategic plans to OSBM
November 22, 2011 – OSBM and the Governor’s Policy Office complete reviews
December 1-7, 2011 – OSBM /Governor’s Policy Office communicate feedback
December 7, 2011 – December 30, 2011 – Agencies revise strategic plans as needed
December 30, 2011 – Final agency strategic plans due to OSBM

Guidelines for updating your strategic plans are attached and can be found online at http://www.osbm.state.nc.us/files/pdf_files/Guidelines20110929_StrategicPlanning.pdf If you have any questions concerning the guidelines, template or about planning in general, please contact Trevor Minor at (919) 807-4787.

Thank you.