



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

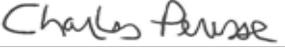
ROY COOPER  
GOVERNOR

CHARLES PERUSSE  
STATE BUDGET DIRECTOR

August 16, 2018

**MEMORANDUM**

TO: Department Heads, Chief Financial Officers  
All State Departments, Institutions, and Agencies

FROM: Charles Perusse   
State Budget Director

SUBJECT: Agency Strategic Planning Guidelines for the 2019-21 Biennium

The Office of State Budget and Management (OSBM) has updated the strategic planning guidance for the 2019-21 fiscal biennium and is requesting that you submit a 2019-21 strategic plan which reflects your agency's current goals, programs, and operations. As part of Governor Cooper's priority to ensure an effective, accountable, and well-run state, your updated strategic plans should:

- \* 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 global agency goals, program goals and initiatives, and individual expectations and results.
- \* Establish a mechanism for evaluating your progress and continuous improvement.

All agencies are required to submit strategic plans as part of the budget development process. **Budget expansion requests must clearly support goals included in the agency's strategic plan to be considered in the Governor's 2019-21 recommended budget.** This requirement will also be referenced in OSBM's forthcoming budget instructions for the 2019-21 biennium. Additionally, the Department of Information Technology (DIT) will be issuing 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.

Attached you will find the 2019-21 strategic planning guidelines as well as a template for strategic plan development. These documents can also be accessed on OSBM's website. Plans must be submitted electronically to OSBM no later than November 1, 2018 and will be made publicly available on OSBM's website.

OSBM is hosting strategic planning trainings on Tuesday, August 28<sup>th</sup> from 2 pm to 4 pm and Friday, September 7<sup>th</sup> from 10 am to 12 noon in Room 245 in the Albemarle Building. Lydian Altman from the UNC School of Government will provide this training. This is the first of

regular inter-departmental training and collaboration opportunities on planning and performance. We encourage you to send all staff members who will work on your strategic plan to this training; your strategic planning team might include not only your budget and financial staff but also program directors, CIOs, and other members of agency senior leadership. Please click [here](#) to RSVP to the training. We have a limited number of seats available and will close registration once full.

If you have any questions concerning the guidelines, template, or about strategic planning in general, please contact Corey Petersohn, (919) 807-4770 or [Corey.Petersohn@osbm.nc.gov](mailto:Corey.Petersohn@osbm.nc.gov).

Thank you.