

# OMB BUSINESS PLAN INSTRUCTIONS FALL 2024



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**INSTRUCTIONS FOR DEPARTMENT BUSINESS PLANS - FALL 2024**

**DIRECTOR'S BUSINESS PLAN CHECKLIST**

- I am using the **revised** business plan template for FY 2024-25 and FY 2025-26 located on the OMB Business Planning [Website](#). The time frame for this business plan represents the two-year period of October 1, 2024 through September 30, 2026.
- I have reviewed how my department supports the goals and objectives in the County strategic plan. (Refer to [Strategic Plan Goals and Objectives](#) for a list of goals and objectives).
- I have included in the Business Plan the most important issues and initiatives my department needs to address in **FY 2024-25** and **FY 2025-26**. I have also identified issues I anticipate for years beyond FY 2025-26.
- I have reviewed my department's Scorecard and Business Plan Report generated in the online Strategic Management System (SMS). I have confirmed that my scorecard's objectives and measures are **relevant and up to date**, and that they align to the Strategic Plan.
- I have reviewed the Mayor's 4Es of **Equity, Economy, Environment, and Engagement**. I have considered how my department's activities and my scorecard objectives can support the 4Es. I have also included in the [Measure Alignment to 4E-Thrive305](#) table the relevant performance measures to track my department's support of the Featured Objectives, 4Es and the Thrive305 action plan.
- I have signed the cover page and forwarded the signed originals to OMB by the due date of **December 13, 2024**.

**BUSINESS PLAN DUE DATE**

Directors sign and submit Business Plans to OMB, **including PDF of Scorecard Business Plan Report**

**December 13, 2024**

Chiefs sign business plan and submit final signed version to OMB, **including PDF of Scorecard Business Plan Report**

**July 15, 2025**

## INSTRUCTIONS FOR DEPARTMENT BUSINESS PLANS - FALL 2024

**I. INTRODUCTION TO BUSINESS PLANS AND SCORECARDS IN MIAMI-DADE COUNTY**

Departmental business plans are the foundation for appropriate resource allocation through the annual budget process that funds County activities aligned to the goals and objectives listed in the Miami-Dade County Strategic Plan. A well-written business plan summarizes a department's purpose and mission, communicates its priority initiatives for the current and the next fiscal year, and lists key issues which may impact the department's ability to achieve its desired outcomes.

There are **two parts** to the Business Plan:

1. **The Business Plan Narrative**: The narrative provides a written overview of a department's core mission, issues it is facing, and initiatives it wants to pursue in the coming fiscal year. The narrative is prepared in Microsoft Word, and a template for departments is available on the OMB Business Planning [Website](#).
2. **The Business Plan Report**: This report is generated from the department's scorecard in the County's Strategic Management System (SMS). It shows how a department's scorecard objectives are aligned to the strategic plan, the measures it will track, as well as the performance measure targets for the upcoming fiscal year. Targets should reflect the levels required to achieve the outcomes listed in the Strategic Plan. The business plan report should also show departmental priority initiatives included on the scorecard.

Scorecards are monitored throughout the year by departments to manage the implementation of their business plan. The information presented in the business plan is then reviewed by OMB as an introduction to the annual budget process. As a result, it is critical that departments submit their business plans on time with up-to-date details about their challenges and priorities.

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### II. KEY STEPS TO BUILDING A BUSINESS PLAN

Business plans should be collaboratively prepared with input from departmental staff, OMB, and the Office of the Mayor. All parties should provide input throughout the process prior to final submission. Below is some guidance for developing business plans.

#### Departmental Roles and Responsibilities

**Departmental leadership** should review the goals and objectives of the Miami-Dade County Strategic Plan ([Strategic Plan Goals and Objectives](#)) and accordingly lay out the Department’s performance objectives, measures, and initiatives for the current and next fiscal year.

**Department managers and key operational staff** should review how specific activities can align to the County Strategic Plan and share factors that may influence their ability to achieve departmental objectives and to specifically define required actions to achieve their performance goals. Managers should remain involved in the business planning process.

**Department staff preparing the plan** should seek out OMB involvement and include Business Analysts in the planning process. For FY 2024-25, OMB will review the business plan submitted in December to provide comments and overall guidance.



*Departmental budget and performance staff should collaborate on an ongoing basis to ensure objectives and performance measures match in the respective SMS and Budget systems.*

If you don’t know where to start, the [Business Plan Development Questions](#) will help departments identify the key elements that should go into a comprehensive business plan. The questions are categorized in the following manner:

- |                               |                      |
|-------------------------------|----------------------|
| 1. Mission                    | 4. Employees         |
| 2. Operating Environment      | 5. Revenue and Costs |
| 3. Customers and Stakeholders | 6. Processes         |

#### Understanding and Incorporating the Mayor’s 4Es

Recent public engagement efforts such as the Mayor’s Thrive305 initiative identified key priorities that are organized under the Mayor’s 4Es. These 4Es highlight the need for County departments to consider how they can:







- (1) foster greater **Equity** in the provision of services,
- (2) promote a stronger and more sustainable **Economy**,
- (3) provide greater stewardship of the **Environment**, and

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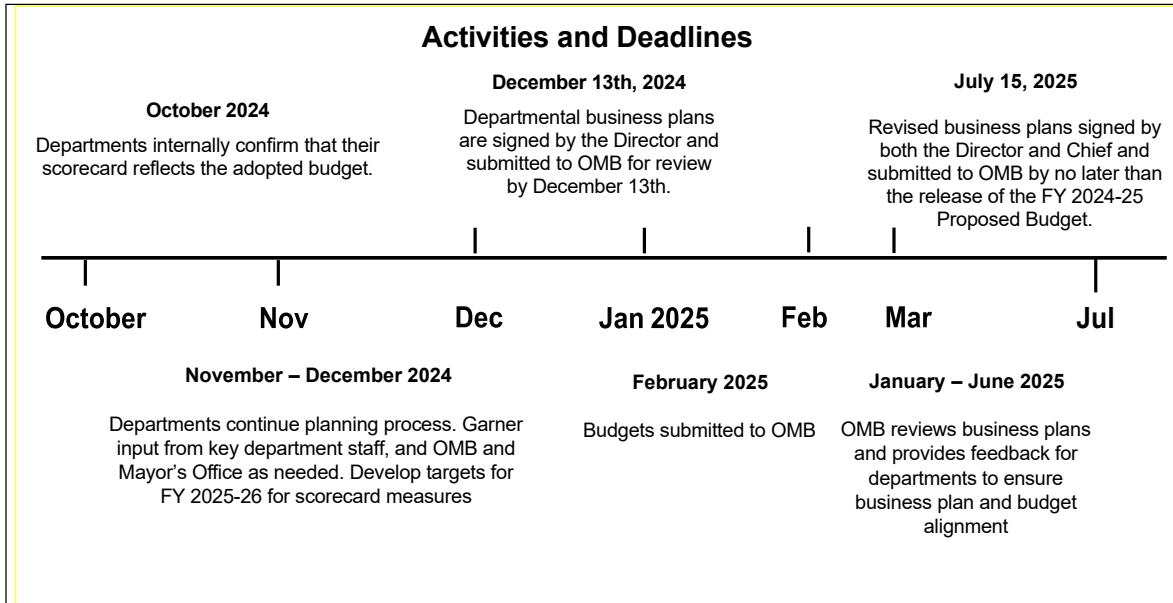
- (4) ensure increased **Engagement** among members of the community.

As departments review their mission and customers' needs, it is important to consider how they can support these important values. "Featured Objectives" are strategic objectives that are especially related to mayoral priorities. The "Featured Objectives" are denoted with an asterisk in the [Strategic Plan Goals and Objectives](#) document. Refer to the [Criteria for Alignment to 4E and Thrive305](#) for help in aligning measures to a specific 4E. Below are the 4Es along with a description.

Mayor's 4Es		
	Equity	<ul style="list-style-type: none"> <li>Our residents and workforce are fully included in all aspects of life in the County regardless of who they are</li> </ul>
	Economy	<ul style="list-style-type: none"> <li>A growing and inclusive economy that creates jobs and invests in local talent, while spurring innovation and investment for the jobs and assets of the future</li> </ul>
	Environment	<ul style="list-style-type: none"> <li>A well-managed built and natural environment that is resilient to climate stressors</li> </ul>
	Engagement	<ul style="list-style-type: none"> <li>A community that trusts government and has timely access to data and information in order to obtain services and influence decision making in the County</li> </ul>

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### III. BUSINESS PLAN TIMELINE



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**IV. COMPONENTS OF THE BUSINESS PLAN NARRATIVE**

The Business Plan Narrative outlines a department's operations and identifies its priority initiatives and key issues for the current and next fiscal year. It should be written in plain language so that it can be shared with employees and stakeholders outside the County. The narrative must be prepared with the latest Microsoft Word template located on the OMB Business Planning [Website](#).

The following is a section-by-section explanation of the information that must be included in the Business Plan Narrative. **Please contact your OMB Business Analyst if you have any questions or need any help in completing the template.**

**1. Department Overview**

- a. Department Vision and Mission: Describe your departmental vision (optional) and mission or purpose statement, which is generally found in the proposed and adopted budget books.
- b. Department Description: Provide an overview of the department's major duties, services, and programs. Also include a brief description of each division.
- c. Table of Organization: Include the latest functional table of organization from the most recent adopted budget. Please contact your OMB Analyst for a copy of your T.O. from the adopted budget. *(If the FY 2024-25 adopted budget is not published in time for the December 13 deadline, please use the T.O. from the FY 2024-25 Proposed Budget.)*
- d. Our Customers: Identify departmental customers and their most important needs. If applicable, include major customer trends that can impact operations. Be sure to include **internal** County customers as necessary. Include a description of how customer feedback is obtained, addressed, and measured. Key customer requirements/needs can be translated into performance measures and included on a department scorecard. These performance measures should be indicative of how well a department is meeting or exceeding customer needs.

When evaluating your customers' needs and requirements, consider using the five quality elements (accuracy, cost, timeliness, safety, legal/ethical) to determine which elements are most important to achieving your customer's satisfaction.

When considering your customers' needs and requirements, please briefly explain how the Mayor's 4Es of equity, engagement, environment, and economy may apply to your current business plan. Additionally, include where your operations support one or more of the priorities and actions described in Thrive305.

- e. Strategic Alignment, 4E, and Thrive305 Summary: Identify the Strategic Plan goals and objectives that are directly supported by the department's **most important** activities. It is not necessary to list all goals and objectives that the department may support. The full list of the County Strategic goals and objectives can be found in the [Strategic Plan Goals and Objectives](#) document. The 4Es



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can be found in the [Criteria for Alignment to 4E and Thrive305](#) table. The Thrive305 Priorities and Actions Template is found in the [Thrive305 Priorities and Actions](#) document.

Complete the [4E-Thrive305 Alignment Table](#) as shown in the Business Plan Template to demonstrate alignment of department measures with the 4Es and Thrive 305 initiatives. Only measures that align to the 4Es or Thrive305 need to be included in the table. All measures listed in the table must be currently tracked in SMS. See example below:

4E-Thrive305 Alignment Table

Measure Name	4E (Environment, Equity, Economy, or Engagement)	Thrive 305 Priority or Action
Example: Number of activities implemented to decrease Countywide energy consumption	Environment	Action 9.1

f. **NEW:** Recent Accomplishments



Please include a brief summary of your department’s most significant accomplishments for the past fiscal year. These accomplishments should be aligned to priority initiatives in last year’s business plan.

### 2. Key Issues

- a. Insert a summary of significant issues that may impact the implementation of the department business plan (both positively and negatively). Departments are strongly encouraged to perform and include in the business plan a SWOT analysis to help identify such issues.
- b. Include as issues any changes in the business environment, obstacles for major projects, and legislative changes or mandates that impact your operations.
- c. If applicable, include issues that address your department’s competitive environment and industry trends.
- d. Consider including issues identified in Thrive305 or pertaining to the Mayor’s 4Es that impact your operations.

### 3. Priority Initiatives

- a. Priority initiatives are **specific projects that have start and end dates** and are of the greatest importance to your department. Include initiatives that are ongoing or planned in the next fiscal year. Priority initiatives should be limited in number and be directly related to the department’s mission and/or customer needs. Sources for priority initiatives include:
  - Initiatives to address the Key Issues identified.

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- Major projects and efforts that have a direct impact on your objectives and budget, especially those strongly aligned with the Strategic Plan, its Featured Objectives, and the Mayor’s 4Es.
- Key actions identified during Thrive305 or to achieve other Mayoral priorities.

**b. Do not include descriptions of ongoing work or activities.**

- c. Consider, wherever possible, placing some timeframes or milestones on these initiatives that demonstrate progress. For example, refer to phases or make statements, such as, “the project will begin this year and end in 2026.”
- d. Initiatives listed here should be created, linked to relevant departmental objectives and periodically updated in the County’s SMS. However, not all initiatives tracked in SMS need to be listed in this portion of the business plan. See *also Section V: The Business Plan Report*.



*Sample initiatives include:*

- *Complete Ocean Rescue Facility at Crandon Park*
- *Implement Greenway Prioritization Plan*
- *Implement an RER Mobile Inspection System*

*Below are examples of ongoing activities that should **not** be included in this section:*

- *Continue teaching Lean Six Sigma classes*
- *Continue to prepare the Proposed Budget each year*

### 4. Future Outlook

- a. Similar to “Key Issues” above, describe significant factors that may impact your operations and your ability to achieve your strategic goals within the next 3-5 years (examples include: passing of new state or federal legislation, changes in macroeconomic conditions, predictions for County landfill capacity, etc.)

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**V. THE BUSINESS PLAN REPORT (DEPARTMENT SCORECARD)**

The Business Plan Report is completed by using the County's SMS. This report consists of the departmental scorecard followed by more detailed information on the departmental performance measures and initiatives. Below are detailed steps for preparing and submitting this report. If you have any technical difficulties running this report, please call OMB. See the next section for steps to complete the Business Plan Report.

**1. Departmental Scorecard Objectives**

Departmental objectives are aspirational and measurable statements that translate how your major activities support the goals and objectives of the Strategic Plan and the Mayor's 4Es. They should be written in a way that can be easily understood and relatable to departmental operational staff. The following examples provide clear, aspirational, and measurable statements of objectives:

- *Reduce Fire Rescue Dispatch Time (aligned to Strategic Plan Objective PS2-1 Minimize Response Time)*
- *Increase Positive Outcomes for Pets (aligned to NI1-5 Ensure Animal Health and Welfare)*
- *Manage the Effective Use of Housing Choice Vouchers (aligned to HS2-1 Provide the Necessary Support Services for Vulnerable Residents and Special Populations)*

To develop departmental objectives, department staff should take the following steps:

1. Identify the goals and associated objectives from the County's Strategic Plan that the department most directly supports.
2. Evaluate departmental operations and key objectives, and identify those programs, activities, or any associated initiatives that support the achievement of the County Strategic Plan objectives.
3. Validate the departmental objectives on your scorecard. Check to see if they are linked to the correct strategic plan goal or objective. Please contact OMB if the objectives on your departmental scorecard need to change (added or removed) or if you believe the linkages to the Miami-Dade County Strategic Plan are incorrect, or new linkages need to be made. Please also keep in mind how the Mayor's 4Es impact your objectives.
4. Organize your objectives using common balanced scorecard perspectives:
  - a. Customer: objectives related to residents and your customers
  - b. Financial: objectives related to your budget and key revenue and cost drivers
  - c. Internal: objectives related to processes that impact (a) and (b) above
  - d. Learning and Growth: objectives related to your employees, their professional development and skill levels

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Departmental Objectives should be linked to the correct “Parent Objective” in the Strategic Plan.

## 2. Performance Measures and Targets

Performance measures must be established to assess how well departments are meeting their objectives as well as the goals and objectives included in the County Strategic Plan. Performance measures must also include *targets* that support achievement of the Strategic Plan.

In addition, departments should include measures and set corresponding targets that support the 4Es of equity, economy, environment, and engagement as identified during Thrive305.

Performance measures should focus the desired outcome as expressed by the objective or for an activity’s efficiency. Input and output measures are of secondary importance. As a best practice, all performance measures in the SMS must contain a clear and brief description of how the measure is calculated, what the measure is measuring, and on the source of the information used to calculate the performance measure.

The [Miami-Dade County Performance Measure Standards](#) provide standards for developing scorecard measures.



- Please make sure your scorecard objectives display the correct measures.
- **The measures should have targets set and locked in the SMS through FY 2025-26.** Please verify that annualized targets are correct.
- Consider including performance measures identified in the [Thrive305 plan](#).

## 3. Scorecard Initiatives

- Reassess all your current initiatives, including your Priority Initiatives identified during your planning process and listed in your business plan. **Priority Initiatives should be tracked in SMS and shown on your department scorecard.**
- You can remove initiatives from the SMS that are complete. Contact OMB for guidelines on archiving these completed initiatives.
- Make sure measure and initiative owners are up-to-date.

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### *Finalizing the Business Plan Report*

- When all the above changes have been completed on your scorecard, run the Business Plan Report in the County's SMS. Save the document as a PDF and email it along with the signed business plan narrative to OMB. Please call OMB if you have any difficulty finalizing this report.
- The [Instructions for Printing the Business Plan Report](#) contain step-by-step instructions.