



## FY 2018 Unit Operational Plan Format

**Unit Name:**

**Responsible Person:**

**Unit Organization Chart:**

**Unit Description:**

**Unit Mission:**

**Unit Goals:**

### **Zero-based budget**

The budget worksheets assume that unit budgets will be developed from a zero-base level to which support strategic goals and strategic objectives, and ongoing unit operational objectives.

- I. Strategic Goal No. 1:** Graduate School USA will expand and enhance its impact on advancing the public service workforce capabilities and organizations' ability to accomplish their missions.

**Strategic Objective 1:** In FY 2018 increase enrollments in open enrollment by xx% per month for financial management and management science offerings.

#### **Performance indicators**

**Strategic Objective 2:** In FY 2018 increase class-sizes in open enrollment by xx% per month for financial management and management science offerings.

#### **Performance indicators**

**Strategic Objective 3:** In FY 2018 increase HR class size and enrollments by xx% per month

#### **Performance indicators**

- II. Strategic Goal No. 2:** Be known as the provider of the best customer experience in the public service professional development and training field.

**Strategic Objective 1:** Create a culture that values customers.

- Establish a customer relations process by June 30th to improve the customer experience by 10% based on a baseline survey. (*ownership, survey feedback and complaints management, specific actions to be addressed with responsible person defined, institutional understanding of the need for customer relations – include Patrick's CRM definition*).
  - Implement Salesforce's web enabled lead generation capability.
  - Develop an implementation plan that will gather, analyze and efficiently use data gathered on a quarterly basis.

#### **Performance indicators**

**Strategic Objective 2:** Increase touch points which include face to face interactions, a sales team that interacts with organizations relating to open enrollment and other relevant data.

- Identify and implement the appropriate customer services to engage customers and build a learning culture.

**Performance indicators**

**III. Strategic Goal No. 3:** The School will employ an industry best management system that is customer-centric and market oriented.

**Objective 1:** Develop a process to communicate & operationalize the value of each unit as a part of the whole. (GSUSA mission, goal, objectives and personal objectives).

- Establish and define key business units (i.e. organizational units, teams, etc.)
- Develop a process whereby every employee at Graduate School USA establishes smart goals and is held accountable.

**Performance indicators**

**IV. Unit Operational Objectives**  
(e.g. Internal Customer Service Improvement Objective)

**Performance Indicators**

**V. Innovations**

- Revenue generating (sales)
- Operational Efficiency
- Cost Containment
- Quality Improvement



## **Unit Operational Plan FY 2018**

The School's Operational Plan is the result of the process of defining the School's annual work plan and explaining the following:

- The portion of the Strategic Management Plan (strategic goals and objectives) that will be put into operation during a one-year period;
- The activities necessary to the continued viability and growth of the School (e.g., technology upgrades, compliance requirements, changes in demand for services and products, etc.); and,
- The activities necessary to ensure continuous improvements to our ability to carry out our mission and achieve our strategic goals at all levels of the School.

The School's operating budget specifies the revenue and expenses necessary to support the School's Operational Plan. The administration uses information from Unit Operational Plans (UOP) to evaluate performance, support budget decision making, and prepare the School's operating budget.

Based on the individual unit missions, units develop operational plans and define the activities necessary to support the accomplishment of the goals of the unit (including plans for ongoing improvement), as well as the unit's contribution to the School's Strategic Management Plan, as well as their associated costs and any anticipated revenue. The (UOP) specifies the actions proposed for the following year, the one year cost/revenue, and any known implications for ensuing years. (For example, the unit may anticipate cost savings in ensuing years resulting from the accomplishment of an objective, the implementation of a new technology, etc.)

The administration determines the sufficiency of those UOPs and makes necessary adjustments. The administration develops a one-year SOP and an accompanying one-year operating budget as defined above. The SOP must be in line with a realistic projection of the School's resources.

The Board's approval of the annual operating budget also serves as approval of the SOP. The School relies on the Strategic Plan, the annual UOPs, and historical trends to develop two and five year budget projections.



## **DEFINITIONS OF UOP ELEMENTS AND INSTRUCTIONS**

### **Unit Name**

Enter the name of the unit as it appears on the most recent organization chart for the School.

### **Responsible Person**

Enter the name of the head of the unit as it appears on the most recent organization chart for the School.

### **Unit Organization Chart**

Provide the organization chart showing each employee assigned to the unit.

### **Unit Description**

Enter a brief description of the unit and its major functions.

### **Unit Mission**

Enter the unit mission (most recently revised version or the one that appears in the last Unit Effectiveness Plan – See Regina Gibbons if necessary).

### **Unit Goals:**

Enter the unit goals (those goals most recently revised or those from the last Unit Effectiveness Plan – see Regina Gibbons if necessary).

### **Zero-based Budget**

The budget worksheets assume that unit budgets will be developed from a zero-base level to support strategic goals and strategic objectives, and ongoing unit operational objectives. The zero-based budget should first support the funding level for each unit that reflects the financial resources necessary to carry on all existing programs and functions of the budget unit at their current level of service in the ensuing fiscal year, including any adjustments necessary to account for the increased cost of services or materials due to inflation.

A brief narrative description speak to the justifications for supporting SGs and SOs as well as any changes to the scope and level of unit operational objectives. Please take into account and provide justification for each adjustment:

- **Adjustments due to increased/decreased costs of goods and services**
- **Adjustments due to increased/decreased workload requirements**
- **Adjustments due to changes in laws, regulations or other requirements**

If there are anticipated changes in the demands for the resources of this budget unit such as actions that support SG and SO accomplishment, increases/decreases in enrollments, changes in government regulations and other changes, those changes should be described and the costs identified and included in the budget. Examples of additional costs include: staffing changes required due to increased/decreased demand for classes, new initiatives that require funding, regulatory changes that require changes, cost savings initiatives, etc.

### **Unit Operational Objectives**

Objectives are those strategic objectives from the Strategic Management Plan that the unit is addressing, and those priority operational objectives specific to the unit. They represent intermediate outcomes--specific, measurable milestones along the road to accomplishing goals. They identify results or service levels to be achieved. Objectives should be SMART; that is, they should be: Specific; Measurable; Aggressive but Attainable; Results oriented; and Time-bound.

Unit objectives should answer these questions:

- What portion of the Strategic Management Plan will be undertaken by this unit during the upcoming fiscal year?
- Based on evaluation of Unit performance over the past year, what performance improvement(s) will be attempted over the upcoming year?

As you draft unit objectives:

- State each objective separately and show related information (link to Strategic Management Plan, performance indicators, and explanatory notes) immediately following the objective. Present one objective with its related information before stating another objective.
- Present objectives in a logical sequence. For example, all objectives related to a particular strategic initiative should follow one another.
- Be sure that the time frame for the objective is clear. Objectives in an operational plan should be achievable during the fiscal year covered by the operational plan. If an objective is slated for accomplishment at some specific point within the fiscal year covered by the operational plan, that date should be cited. (Example: "By January 1, 2018. . .").
- Label or otherwise identify those objectives that you consider to be key--achievement of the objective is a critical success factor for the unit.
- Briefly identify the strategies that will be implemented to achieve the objective.

### **Innovations**

Each unit is strongly encouraged to identify innovations that are attainable and actionable over the coming fiscal year that will 1) result in registration/sales growth; 2) realize efficiencies and cost containment; 3) improve the quality of products and services; 4) improve value and the experience our customers have with us.

### **Performance Indicators**

What results are expected and when during the plan are these results expected?

Performance indicators are the tools used to measure performance, progress, and accomplishments.

Performance indicators consist of two parts: indicator name and indicator value. The indicator name describes what you are measuring. The indicator value is the numeric amount or level actually achieved or to be achieved.