Fiscal Planning User Guide

AI-Powered Strategic Planning for RMU Athletics

🎯 Overview

The Fiscal Planning module helps you create comprehensive strategic plans for each fiscal year using AI-generated strategies aligned with your core priorities.

📋 Quick Start: Complete Workflow

Step 1: Create Your Fiscal Plan

Location: Fiscal Planning Dashboard → "Create New Fiscal Plan"

1. Enter fiscal year (e.g., "FY27")
2. Set start and end dates (typically July 1 - June 30)
3. Click "Continue"

Step 2: Define Core Priorities

What are priorities? Your 3 most important strategic objectives for the year

Examples:

- Priority 1: Increase Hockey Revenue by 25%
- Priority 2: Maximize Turf Field Utilization
- Priority 3: Enhance Student-Athlete Academic Support

To Define:

1. Enter a title for each priority (at least 1 required)
2. Add optional descriptions for context
3. Click "Complete Setup"

✅ **Result:** Your fiscal plan is created and ready for strategy generation

Step 3: Generate AI Strategies

Location: Fiscal Plan Detail Page → "Generate AI Strategies"

The AI will analyze your priorities and create detailed strategies with:

- Implementation steps
- Required resources
- Risk assessments
- Success metrics (potential KPIs)

- Supporting evidence

Process:

1. Click "Generate AI Strategies"
2. Select which priorities need strategies
3. Provide context (budget, constraints, goals)
4. Click "Generate Strategies"
5. Wait 30-60 seconds for AI to create strategies

✅ **Result:** Draft strategies appear under each priority

Step 4: Review & Approve Strategies

Location: Fiscal Plan Setup → View Draft Strategies

Each strategy shows:

- **Title** - What the strategy aims to achieve
- **Description** - How it will be implemented
- **Status Badge** - Draft, Under Review, Approved, or Rejected

To Approve:

1. Click "Review Strategies" from detail page
2. Review each draft strategy under its priority
3. Click ✅ **green checkmark** to approve
4. Click 🎯 **red icon** to reject

Best Practice: Approve strategies that align with budget, resources, and organizational capacity

✅ **Result:** Approved strategies are ready for conversion to formal OGSM components

---

Step 5: Create KPIs (Optional but Recommended)

Location: AI Strategy Generator or Fiscal Plan Setup

Before converting to OGSM, create KPIs to track strategy success:

To Create KPIs:

1. Find an approved strategy with success metrics
2. Click "Create KPIs" button
3. Review pre-populated success metrics
4. Fill in:
   - **Target Value** (e.g., 5000)
   - **Unit** (e.g., "tickets", "%", "$")
   - **Frequency** (monthly, quarterly, annual)
5. Select/deselect KPIs to create
6. Click "Create Selected KPIs"

Example KPI:

- Name: "Increase hockey ticket sales"
- Target: 5000
- Unit: "tickets"
- Frequency: "monthly"

✅ **Result:** KPIs are created and trackable in KPI Dashboard

---

Step 6: Convert Strategies to OGSM

Location: Fiscal Plan Detail Page → Blue Alert Banner

Once you have approved strategies, convert them to formal OGSM framework:

Visual Indicator:

- Blue banner appears: "Ready to Convert Strategies"
- Shows count of approved strategies ready

To Convert:

1. Click "Convert to OGSM" button
2. Review strategies in modal (organized by priority)
3. All strategies are pre-selected
4. Optionally deselect strategies to convert later
5. Click "Convert to OGSM"

What Happens:

- Strategies become formal OGSM components
- They appear in your OGSM View
- "Converted" count increases in dashboard
- Strategies are marked as "converted" (can't be edited)

✅ **Result:** Strategies are now part of your official OGSM strategic framework

---

Step 7: Activate Your Plan

Location: Fiscal Plan Detail Page → "Activate Plan" button

Prerequisites:

- ✅ All approved strategies must be converted to OGSM
- ⚠️ System will prevent activation if unconverted approved strategies remain

To Activate:

1. Ensure all approved strategies are converted
2. Click "Activate Plan" in top-right
3. Confirm activation

What Happens:

- Previous fiscal plan status changes to "completed"
- New plan becomes the active fiscal year plan
- Plan is now live and official

✅ **Result:** Your fiscal year strategic plan is active!

📊 Understanding Your Dashboard

Progress Statistics

Stat	Meaning
Total Strategies	All strategies generated for this plan
Draft	Generated but not yet reviewed (yellow)
Under Review	Being evaluated (blue)
Approved	Ready to convert to OGSM (green)
Converted	Now part of OGSM framework (indigo)
KPIs Created	Number of KPIs tracking strategy success (purple)

Progress Bar

Shows overall completion: (Converted Strategies / Total Strategies) × 100%

💡 Pro Tips

🎯 Best Practices

1. **Be Specific with Priorities**

   - ❌ "Improve performance"
   - ✅ "Increase hockey ticket sales by 25%"

2. **Provide Context to AI**

   - Include budget constraints
   - Mention available resources
   - Note organizational priorities

3. **Review Thoroughly Before Approving**

   - Check implementation feasibility
   - Verify resource requirements
   - Ensure alignment with budget

4. **Create KPIs Before Converting**

- Easier to identify success metrics
- Can reference strategy details
- KPIs track progress throughout year

5. **Convert Strategically**

- You don't have to convert all approved strategies at once
- Start with highest priority
- Can reject and regenerate strategies if needed

🚨 Common Mistakes to Avoid

❌ Don't	✅ Do
Approve all strategies without review	Carefully evaluate each strategy's feasibility
Skip KPI creation	Create KPIs to track success metrics
Activate plan with unconverted strategies	Convert all approved strategies first
Generate strategies without context	Provide detailed context to AI for better results

---

🔄 Workflow Summary

```
1. CREATE PLAN          → Define fiscal year and dates
        ↓
2. SET PRIORITIES       → Define 3 core objectives
        ↓
3. GENERATE STRATEGIES  → AI creates detailed strategies
        ↓
4. REVIEW & APPROVE     → Evaluate and approve strategies
        ↓
5. CREATE KPIs          → Track success metrics (optional)
        ↓
6. CONVERT TO OGSM      → Make strategies official
        ↓
7. ACTIVATE PLAN        → Set plan as active for fiscal year
```

🆘 Troubleshooting

"Cannot activate plan: Some approved strategies have not been converted"

Solution: Go to Fiscal Plan Detail, find the blue "Convert to OGSM" banner, and convert all approved strategies.

"No strategies generated"

Solution:

- Ensure your priorities have descriptive titles
- Provide more context when generating strategies
- Try regenerating with different parameters

"Add to Plan button not working"

Solution:

- Ensure the fiscal plan is in "draft" status
- Check that priorities are defined
- Verify you're adding to the correct plan

"KPI creation failed"

Solution:

- Ensure KPI has a name
- Check that the strategy hasn't been deleted
- Verify you've selected at least one KPI

🎓 Key Concepts

Fiscal Plan: A strategic plan for a specific fiscal year (e.g., FY27)

Priority: A core objective for the fiscal year (you define 3)

Draft Strategy: AI-generated strategy awaiting review and approval

OGSM: Objectives, Goals, Strategies, Measures framework - the formal strategic planning structure

KPI: Key Performance Indicator - measurable values tracking strategy success

Conversion: The process of making approved draft strategies official OGSM components

Activation: Setting a fiscal plan as the current active plan

Last Updated: January 2026 Version: 2.0