

**April 11, 2008**

**Office of State Finance Strategic Plan  
FY-2008 – FY-2013**

**Agency Mission**

- Provide state-wide leadership for finance, technology and communications;
- Support agency customers by supplying necessary fiscal, technological and budgeting expertise; and
- Serve the citizens of Oklahoma by promoting effectiveness, efficiency and transparency.

**Agency Vision**

We are an organization of highly dedicated professionals that:

- Delivers the highest quality service to all of our clients;
- Promotes continuous improvement through the efficient and effective use of the latest technology, systems and procedures;
- Provides leadership and quality service through professionally trained staff; and,
- Improves state government for the benefit of Oklahoma citizens.

**Values and Behaviors**

We conduct our business with integrity and reliability.

We value pragmatic and diverse approaches to solving problems.

We invest in our people and their ability to contribute to the welfare of Oklahoma.

We help citizens understand how state government finances work.

We promote effective and efficient practices, policies and procedures.

We provide quality service and problem solving for our clients.

**Office of State Finance Agency Goals and Action Plans:**

**Goal 1 - The Office of State Finance delivers the highest quality service to all of our clients.**

- 1.1 **Open Books:** Establish a multi-phase project to post searchable sources of information on an OSF website. "Open Books" (Help Desk, Budget, DCAR)  
**Plan Manager: Lisa McKeithan**

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- 1.2 **Customer Service:** Develop better and more effective communication between OSF and agencies. (DCAR/BUDGET/ISD) **Plan Managers: Drew Hall and Brandy Manek**
- 1.3 **Key Financial Processes:** Review inputs, outputs and processes of key financial transactions for the purpose of improving the efficiency of financial functions of the state. (DCAR/ISD) **Plan Managers: Brenda Bolander and Joe Fleckinger**
- 1.4 **Procedures Manual:** Develop an updated OSF Procedures Manual. (DCAR/BUDGET) **Plan Manager: Steve Wilson**
- 1.5 **Shared Services Initiative:** Market OSF services to state agencies. (DCAR/BUDGET/Help Desk/ISD) **Plan Managers: Riley Shaul and Drew Hall**
- 1.6 **Issue analysis and budget preparation for Governor:** Develop quality budget proposals for the Governor after identifying areas where state programs can be operated more efficiently, analyzing the effectiveness of state management systems and prioritizing state needs. (BUDGET) **Plan Manager: Brandy Manek**
- 1.7 **Assist Agencies in implementing budgets:** Once passed by the Legislature and signed by the Governor, assist agencies with setting up their annual budgets. (BUDGET) **Plan Manager: Brandy Manek**

**Goal 2 – The Office of State Finance’s professionally trained staff provides leadership and quality service in fulfillment of the agency’s mission.**

- 2.1 **Strategic workforce planning:** Conduct strategic workforce planning including emergency preparedness (All Divisions). **Plan Manager: Kristin Griffin**
- 2.2 **Training:** Training and Cross-training of OSF employees in critical functions. (All Divisions) **Plan Manager: Kristin Griffin**

**Goal 3 - The Office of State Finance provides leadership in State Finance.**

- 3.1 **CFO Training:** Develop Chief Finance Officer training and certification. (DCAR) **Steve Funck**
- 3.2 **Leadership in Financial Management:** Improve the state agencies’ financial management through leadership, contract services and enhanced involvement in the Oklahoma Financial Managers Association. (DCAR) **Plan Manager: Steve Funck**
- 3.3 **State budget law review:** Review state budget laws and make suggestions for improvements/updates. (Administration) **Plan Manager: Jim McGoodwin**

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**Goal 4 - The Office of State Finance provides leadership for technological and communications infrastructure for the purpose of economy, efficiency and coordination among state agencies.**

- 4.1 **CIO Training:** Develop Chief Information Officer training and certification. (ISD) **Plan Manager: Joe Fleckinger**
- 4.2 **Security:** Initiate a state plan for security of IT processes and equipment. Assist all agencies in conducting a security risk assessment of their information technology and telecommunication environments and assist agencies to develop a plan to mitigate critical security weaknesses identified. (ISD) **Plan Manager: Joe Fleckinger**
- 4.3 **PeopleSoft Upgrade:** Complete the implementation of the CORE system. (ISD/DCAR) **Plan Managers; Brenda Bolander and Michael Grisser**
- 4.4 **Emergency Preparedness (Data Center):** Develop and implement a statewide disaster recovery plan for IT services. Construct and operate a 24/7 secure, below ground data center with redundant infrastructure and sufficient floor space to house all state agencies' information technology equipment. (ISD) **Plan Manager: Joe Fleckinger**
- 4.5 **Statewide consolidated telecommunications:** Joint OSF/OneNet venture to develop a statewide vision for consolidated telecommunications to include VoIP, wireless, video, internet, etc. (ISD) **Plan Manager: Joe Fleckinger**

## **Summary of Process and Environmental Factors**

### **Strategic Planning Process**

Consultants interviewed OSF senior managers to help identify agency strengths, weaknesses, opportunities and threats (SWOT). The consultants then held a series of meetings which included all agency employees. The process was explained and a survey was distributed to each employee. The respondents could not be identified from their surveys.

Responses to the survey were analyzed by the consultants. A senior management team met with them to review the responses in detail. The team then established an agency vision and identified central strategies for achieving it.

In order to develop a strategic plan that included maximum input from the staff, two additional groups were used in the planning process. First, a team was chosen from cross-section of OSF staff members. This group of employees reviewed the SWOT survey responses and the management team's vision and strategies. This group then created the agency mission, defined three core values and established action priorities.

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Then an Action Team was picked from employees throughout the agency. This second group was charged with the responsibility of defining recommendations to take to the management team.

The management team continues to meet and develop strategies for achieving the vision and to review the recommendations made by the Action Team.

**Summary of environmental assessment:**

The Office of State Finance delivers financial, technological and communication services to approximately 200 agencies with over 68,000 employees statewide. OSF was created by the Oklahoma Budget Law of 1947 and is part of the Executive Department and is under the administrative control of the Director of State Finance who is appointed by the Governor, with the advice and consent of the Senate.

The agency delivers services with an operating budget of approximately \$34 million which is derived from appropriations and fees.

**Summary of new conditions/issues that will exist in the short and long-term future:**

New technology, including but not limited to the Internet, offers the opportunity to significantly streamline government services.

The Office of State Finance provides the critical infrastructure (financial, budgetary and technological) for state government. State agencies are challenged to increase productivity with limited resources in every area. The challenge for the Office of State Finance, both in the short-term and long-term, is to provide quality financial, budgetary and technological services.

One of the main short-term goals is to continue implementation of the CORE system, which provides integrated financial, human resources and purchasing systems for all state agencies.

**Summary of financial needs to address issues:**

- 1) CORE Project: The full and successful implementation of CORE project depends on OSF's ability to maintain appropriations and fees at current levels.
- 2) Shared Services: Improving the quality of financial, budget, payroll and services will require an increase in revenue which may be generated by providing quality shared services to agencies and increasing the number of agencies contracting for shared services.
- 3) Data Center: Building a secure data center which provides 24 hour reliability and security depends on receiving the necessary authorizations and appropriations.

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- 4) We need to obtain sufficient resources to recruit and retain quality employees and continue their professional education.