

E-mail to Agencies:

It is that time of year again. Attached is a copy of the FY-2006/2007 Budget Request Instructions and Forms and FY-2005/2010 Strategic Plan Instructions and Forms. These documents will be on OSF's website by 5:00 p.m. on Tuesday, August 3. Access to the OSF Budget Request System will be available by Friday, August 6. The Office of State Finance will not be mailing a hardcopy of these documents to agencies. If you have problems opening the attachments in this e-mail, please e-mail or call me, 522-3179.

FY-2006/2007 Budget Request Instructions- FY-2005/2010 Strategic Plan Instructions

Here are changes and reminders for the Budget Request/Strategic Plan Process:

- Pursuant to Section 45.3 of Title 62, a new strategic plan is due October 1, 2004 for FY-2005/2010. Strategic plan instructions are included in the Budget Request Instructions. Strategic planning facilitation information, a process agenda and agency contact information is also included in this e-mail.
- The Agency Budget Summary Information form (BRR0260 – Budget Summary) has changed. This year the form will ask agencies to summarize budget and program actions taken to establish the FY-2005 budget and what actions the agency will take if the agency's appropriation is reduced by 5 percent.
- There is a new question in the FTE section of the Budget Request asking for agencies's workforce planning efforts. Workforce planning is an important part of an agency's strategic plan and business process. Please be sure to answer this question.
- Please be sure to include a request to annualize the employee salary increase effective January 1, 2005 in the operations funding changes section. If the state pay percentage listed in the State Pay Percentage section is not an appropriate percentage to apply when calculating the cost of an employee salary increase, complete the section that asks why it is not appropriate.
- Agencies will need to send a copy of their Budget Request to each of the ten members on the Legislative Oversight Committee on State Budget Performance.

Please be sure to read through the instructions. OSF will have dividers ready by the end of August and will notify you when they are ready. If you have any questions or concerns, please do not hesitate to contact me or your budget analyst.

Strategic Plan Information

Strategic Plan materials attached in this e-mail are designed to guide your agency's process of thinking and planning strategic long-term direction. Your agency has until October 1, 2004, to submit a five-year strategic plan for FY-2005/2010.

Agencies have several options for preparing strategic plans.

- 1) If you already have a strategic plan or are in the process of preparing one, you can continue with whatever method you are using as long as it meets the requirements set by OSF.
- 2) Several agencies can work together and select a facilitator from the approved list and share the cost.
- 3) An agency can individually select a facilitator from the state-approved facilitator list.
- 4) Use the expertise existing within your agency, without outside assistance.

Included in the Strategic Plan attachments is a list compiled by OPM of persons who have been approved to serve as facilitators for agencies as they prepare their strategic plans. Detailed information on each facilitator and his or her fees for providing services inside and outside the metropolitan Oklahoma City area is included with the attached facilitator list.

Strategic plans take time to complete. If you are just beginning, you need to invest approximately one hour as a planning team and three hours individually to jump start the strategic planning process. If you intend to follow some process to develop your strategic plan other than the one described in these instructions, please contact me, so we can discuss it.

If you have questions about this information or would like to request information on facilitators, please contact Joyce Smith (405-522-3617) at the Office of Personnel Management or go the OSF website strategic planning information link under the Budget Division.

The website link is **www.osf.state.ok.us**