

MANAGEWARE



OPERATIONAL PLAN

Format, Guidelines, and Instructions

FY 2000-2001

An operational plan is an annual work plan. It describes short-term business strategies; it explains how a strategic plan will be put into operation (or what portion of a strategic plan will be addressed) during a given operational period (fiscal year). An operational plan is the basis for and justification of an annual operating budget request. Therefore, a strategic plan that has a five-year lifetime would drive five operational plans funded by five operating budgets.

HELP

HOW TO: Prepare an Operational Plan

Basic Operational Plan Requirements

As required by Act 1465 of 1997, an operational plan (OP) must be prepared and submitted by each department/agency (or budget unit) as part of its "total budget request document." An OP draws directly from agency and program strategic plans to describe agency and program missions and goals, program objectives, and program activities. Like a strategic plan, an operational plan addresses four questions:

- Where are we now?
- Where do we want to be?
- How do we get there?
- How do we measure our progress?

To answer those questions, meaningful data must be included for prior fiscal years, the current fiscal year, and the ensuing fiscal year (the fiscal year for which funding is requested). The OP is both the first and the last step in preparing an operating budget request. As the first step, the OP provides a plan for resource allocation; as the last step, the OP may be modified to reflect policy decisions or financial changes made during the budget development process.

Because Louisiana appropriates funds to budget units by program, the operational plan (OP) is focused primarily on program level information. However, that program information must be placed in the overall context of the department/agency (budget unit) within which each program operates and must identify and describe the activities of which each program is composed. The OP must link department/agency goals, program goals and objectives, and program performance. To do this, the OP provides information about the department/agency (budget unit) submitting the budget request; the program or programs operated by the department/agency (budget unit); and activities included in each program. Specifically, the OP includes: