

Annual business planning process and timescales



Annual strategic delivery plans

Every three years the SSSC develops and agrees a Strategic Plan following consultation with stakeholders, customers and partners. We align the Strategic Plan with our three-year budget plan and Council members give their approval before we seek consent for the plan from the Scottish Government. To ensure delivery of our strategic outcomes remains focused during the three years, we also publish an Annual Strategic Delivery Plan (previously called the Operational Plan). This shorter document sets out the projects we will deliver during the year to achieve the longer-term outcomes and priorities in the Strategic Plan. Once this plan is agreed, we ask directorates to identify appropriate milestones for each quarter. This ensures we can effectively monitor and report on our progress.

Annual directorate plans

Annual Directorate Plans sit underneath the Strategic Plan and the Annual Strategic Delivery Plan. Directorates will produce these plans each year following the standard template that is attached to this report. Production of consistent directorate level plans will enable us to present the operational and business as usual work that we do, as well as our strategic (improvement) work. These documents will contain reference to:

- resources
- organisational structure
- work to deliver strategic outcomes – projects listed in the Annual Strategic Delivery Plan
- key objectives for directorate business as usual
- improvement activity identified through EFQM and audits
- performance.

The Annual Directorate Plans will also present a summary of key performance indicators and achievement of targets.

Timescales and responsibilities

Business planning begins simultaneously with the budget setting process. Performance and Improvement ask each OMT member to identify new areas of work and projects and categorise these as strategic or business as usual on a template. This occurs in September, when the Head of Finance also asks for draft budgets for

each department. New areas of work require a completed Project Initiation Document, access to which is shared between Finance and Performance and Improvement. Projects that require budget greater than £2K will require a business case.

During this time there is an OMT and EMT joint planning session for the purpose of horizon scanning, policy or resourcing discussion and stakeholder engagement.

Finance submits the first draft budget to EMT in December. From January to February, the Performance and Improvement team drafts the Annual Strategic Delivery Plan for presentation to OMT in February and EMT in March. Once it has been agreed by EMT, work begins by directorates to agree the milestones that will be used to monitor and report on progress. These will be used to populate Power BI and related project management templates and software.

The final Annual Strategic Delivery Plan is submitted to Council at the end of March and sent to the Sponsor following approval by Council.

The four directorate plans will be in place each year by 1 June. As a comparison of performance with the previous year is included in the plan, this will provide time to calculate performance figures at year-end.

Process	Responsibility	Timescale
New work and projects identified and recorded on template	Template distribution: Performance and Improvement Completion: All OMT members	September
Budget discussions	Head of Finance with all OMT and EMT	November – December
Joint OMT/EMT planning session for horizon scanning or policy/resource discussion	OMT and EMT	November
First draft budget presented to EMT	Head of Finance and EMT	December
Draft Annual Strategic Delivery Plan developed simultaneous to on-going budget discussions	Head of Performance and Improvement	January – February
Directorates begin drafting annual Directorate Plans	OMT	February
Annual Strategic Delivery Plan presented to OMT	Head of Performance and Improvement	February
Quarterly milestones are identified and submitted to Performance and Improvement	OMT	March
Annual Strategic Delivery Plan presented to EMT and papers approved for Council	Director of Strategic Performance and Engagement	March
Annual Strategic Delivery Plan	Director of Strategic	March

approved by Council	Performance and Engagement	
Final directorate plans are submitted to Performance and Improvement and published online	OMT	June