

OMB BUSINESS PLAN INSTRUCTIONS

Fall 2025



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INSTRUCTIONS FOR DEPARTMENT BUSINESS PLANS - FALL 2025

☒ DIRECTOR'S BUSINESS PLAN CHECKLIST ☒

- ☐ **NEW:** I am using the **new business plan fillable form** for FY 2025-26 and FY 2026-27 located **in the County's Strategic Management System (SMS)**. The time frame for this business plan represents the two-year period of October 1, 2025 through September 30, 2027.
- ☐ I have included in the Business Plan the most important issues and initiatives my department needs to address in **FY 2025-26** and **FY 2026-27**. I have also identified issues I anticipate for years beyond FY 2026-27.
- ☐ I have reviewed the County's Strategic Plan Goals and Objectives and confirmed that my scorecard's objectives and measures are **relevant and up to date**, and that they align to the [Strategic Plan](#). I have reviewed my department's Scorecard and Business Plan Report generated in the online Strategic Management System (SMS).
- ☐ **NEW:** I have confirmed that measures appearing on the Mayor's Executive Dashboard and the Strategic Plan scorecard are included in the department's main scorecard and are reflected in the Business Plan Report.
- ☐ **NEW:** I have completed submittal of the Business Plan in SMS by **January 9, 2026**.

BUSINESS PLAN DUE DATE

Departments submit Business Plans to OMB,
**including confirmation that the Scorecard
Business Plan Report is complete**

January 9, 2026

Departments submit final signed version to OMB,
**including confirmation that the Scorecard
Business Plan Report is complete**

February 6, 2026

I. INTRODUCTION TO BUSINESS PLANS AND SCORECARDS IN MIAMI-DADE COUNTY

Departmental business plans are the foundation for appropriate resource allocation through the annual budget process that funds County activities aligned to the goals and objectives listed in the Miami-Dade County Strategic Plan. A well-written business plan summarizes a department's purpose and mission, communicates its priority initiatives for the current and the next fiscal year, and lists key issues which may impact the department's ability to achieve its desired outcomes.

There are two parts to the Business Plan:

1. **The Business Plan Narrative**: The narrative provides a written overview of a department's core mission, issues it is facing, and initiatives it wants to pursue in the coming fiscal year. **New this year, the narrative will be submitted through a fillable form, which is available in the County's Strategic Management System (SMS). Submitted Business Plan content will also be incorporated into the Department Budget Narrative in the FY 2026-27 Budget Books.** Please note that each field has a character limit.

Please refer to the Business Plan training materials (available on the [OMB web site](#)) for additional guidance on submitting the Business Plan in SMS.

2. **The Business Plan Report**: This report is generated from the department's scorecard in the County's Strategic Management System (SMS). It shows how a department's scorecard objectives are aligned to the strategic plan, how its performance will be measured, and the performance targets for the upcoming fiscal year. Targets should reflect the levels required to achieve the outcomes listed in the Strategic Plan. The business plan report should also show departmental priority initiatives included on the scorecard. **New this year, the Business Plan Report will be generated by OMB and appended to the submitted Business Plan Narrative.**

Scorecards are monitored throughout the year by departments to manage the implementation of their business plan. The information presented in the business plan is then reviewed by OMB as an introduction to the annual budget process. As a result, it is critical that departments submit their business plans on time with up-to-date details about their challenges and priorities.

II. KEY STEPS TO BUILDING A BUSINESS PLAN

Business plans should be collaboratively prepared with input from departmental leadership, management (including internal budget staff), and key operational staff. Department meetings with opportunities for meaningful discussion are highly encouraged.

Below is some guidance for developing business plans.

If you don't know where to start, the [Business Plan Development Questions](#) will help departments identify the key elements that should go into a comprehensive business plan. The questions are categorized in the following manner:

- | | |
|-------------------------------|----------------------|
| 1. Mission and Vision | 4. Employees |
| 2. Operating Environment | 5. Revenue and Costs |
| 3. Customers and Stakeholders | 6. Processes |

Departmental Roles and Responsibilities

Departmental leadership should review the goals and objectives of the Miami-Dade County Strategic Plan ([Strategic Plan Goals and Objectives](#)) and accordingly lay out the Department's performance objectives, measures, and initiatives for the current and next fiscal year, using input from managers and key operational staff.

Department managers and key operational staff should review how specific activities can align to the County Strategic Plan and share key issues that may influence their ability to achieve departmental objectives and to specifically define required actions to achieve their performance goals. Managers should remain involved in the business planning process.

Department staff preparing the plan who need assistance should seek out OMB involvement.

III. BUSINESS PLAN TIMELINE

- Deadline to update department scorecard and submit the Business Plan Narrative in SMS: **Friday, January 9, 2026**
- OMB to provide a PDF copy of the department's complete Business Plan and provide feedback by: **Friday, January 23, 2026**
- Deadline to complete revisions to department scorecard and submit a revised Business Plan in SMS: **Friday, February 6, 2026**

IV. COMPONENTS OF THE BUSINESS PLAN NARRATIVE

The Business Plan Narrative outlines a department's operations and identifies its priority initiatives and key issues for the current and next fiscal year. It should be written in plain language so that it can be shared with employees and stakeholders outside the County. The narrative must be prepared with the latest fillable form.

The following is a section-by-section explanation of the information that must be included in the Business Plan Narrative. **Please contact OMB if you have any questions or need any help in completing the form.**

1. Department Overview



- a. Department Description: **New** - The department description must be submitted in three paragraphs as follows:
 - i. Describe your departmental vision (optional) and mission or purpose statement, which is generally found in the proposed and adopted budget books. The paragraph may also include the department's values (optional). *(Limit of 1500 characters)*
 - ii. Provide an overview of the department's major duties, services, and programs. Identify the strategic areas supported. Incorporate, where applicable, an explanation of the ways in which departmental operations support Mayoral priorities. *(Limit of 1500 characters)*
 - iii. Our customers and stakeholders: Identify departmental customers/stakeholders and their most important needs. If applicable, include major customer trends that can impact operations. Be sure to include **internal** County customers as necessary. Include a description of how customer feedback is obtained, addressed, and measured. *(Limit of 1500 characters)*

Key customer requirements/needs can be translated into performance measures and included on a department scorecard. These performance measures should be indicative of how well a department is meeting or exceeding customer needs.

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When evaluating your customers' needs and requirements, consider using the five quality elements (accuracy, cost, timeliness, safety, legal/ethical) to determine which elements are most important to achieving your customers' satisfaction.

- b. Also include a brief description of each division. (*Limit of 500 characters each*)



- c. Table of Organization: No action from the department is needed. After you submit your Business Plan online, **OMB will insert the latest functional table of organization** from the most recent adopted budget.



Note: The Strategic Alignment section of the Business Plan narrative is no longer necessary. Strategic alignment will continue to be reflected in the Business Plan Report. See also Section V: The Business Plan Report.

- d. Recent Accomplishments



Briefly describe your department's most significant accomplishments for the past fiscal year. These accomplishments should be aligned to priority initiatives in last year's business plan. **New:** For each accomplishment, please identify the primary division associated with that accomplishment, or identify the accomplishment as department-wide.

New: A maximum of **five** accomplishments may be submitted. (*Limit of 400 characters each*)

2. Key Issues

- Insert a summary of significant issues that may impact the implementation of the department business plan (both positively and negatively). Departments are strongly encouraged to perform a SWOT analysis to help identify such issues.
- Include as issues any changes in the business environment, obstacles for major projects, and legislative changes or mandates that impact your operations.
- If applicable, include issues that address your department's competitive environment and industry trends.



- New:** For each Key Issue, please identify the primary division associated with that accomplishment, or identify the accomplishment as department-wide.
- New:** A maximum of **fifteen** Key Issues may be submitted. (*Limit of 400 characters each*)

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3. Priority Initiatives

- a. Priority initiatives are **specific projects that have start and end dates** and are of the greatest importance to your department. Include initiatives that are ongoing or planned in the next fiscal year. Do not include descriptions of ongoing work or activities.
- b. Priority initiatives should be directly related to the department's mission and/or customer needs. Sources for priority initiatives include:
 - Initiatives to address the Key Issues identified.
 - Mayoral priority projects and efforts that have a direct impact on your objectives and budget, especially those strongly aligned with the Strategic Plan.
- c. **New:** Each initiative **must** include the following information:
 - i. Lead division – or enter “Department-wide” for initiatives that span the entire department (*Limit of 100 characters*)
 - ii. Description of initiative (*Limit of 200 characters*)
 - iii. Target completion date (*Limit of 30 characters*)
 - iv. Anticipated benefit (*Limit of 200 characters*)
 - v. Budget impact – including if initiative is budget neutral (*Limit of 200 characters*)
 - vi. Identify whether the initiative supports one of the Mayor's Key Deliverables. (A maximum of one Key Deliverable may be selected.)
- d. **New:** A “Priority Initiative Table” will be automatically generated when the Business Plan is submitted.
- e. Initiatives listed here should be created, linked to relevant departmental objectives and periodically updated in the County's SMS. However, not all initiatives tracked in SMS need to be listed in this portion of the business plan. See also Section V: The Business Plan Report.
- f. **New:** A maximum of **fifteen** Priority Initiatives may be submitted.
- g. Please see the examples on the following page, as viewed in table format:



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Key Deliverable Alignment*	Describe the primary initiative - what action is planned?	Describe the anticipated benefit of the initiative	What is the target completion date?	Explain the budgetary impact	What is the lead Division for this initiative?
FRE	Procure a new lean Six Sigma green and Black training partner	This effort will ensure high quality training services remain available to county employees	December-2025	Training services will be funded by the respective employees' departments	Administration and consulting services
N/A	Revise the OMB website to make sure departmental services are clear, and that information is understandable and easy to find	The revision will include graphical and transparent budgetary information on the OMB website so residents and other stakeholders can obtain summarized budgetary information	September-2025	This initiative will be completed using existing resources	Administration and consulting services
III	Execute the multi-year capital improvement program, including new cruise terminals and other major projects	The CIP is designed to modernize Port Miami and meet market conditions	2030	The fund the proposed CIP projects, port Miami will need approximately \$2.40 billion in future funding.	Department-wide

* Mayor's Key Deliverables

EWA - An Economy That Works for All: Ensure Miami-Dade is a place where people can afford to live, work, and thrive.

FRE - Fiscal Responsibility and Efficiency: Act as responsible stewards of public tax dollars by cutting red tape and identifying efficiencies that maximize resources and results.

HSC - Healthy and Safe Communities: Prioritize the health, safety, and emotional well-being of the community, expanding access to the services people want and need.

III - Investment In Infrastructure: Build and maintain infrastructure that supports long-term growth.

RRR - Risk Reduction and Resilience: Strengthen Miami-Dade's natural and built environments by reducing risk to people and property and safeguarding resources.



*Below are examples of ongoing activities that should **not** be included in this section:*

- *Continue teaching Lean Six Sigma classes*
- *Continue to prepare the Proposed Budget each year*

4. Future Outlook

- Describe significant factors that may impact your operations and your ability to achieve your strategic goals within the next 3-5 years. (Examples include: passage of new state or federal legislation, changes in macroeconomic conditions, predictions for County landfill capacity, etc.) (*Limit of 4000 characters*)

V. THE BUSINESS PLAN REPORT (DEPARTMENT SCORECARD)

The Business Plan Report is completed by using the County's SMS. This report consists of the departmental scorecard followed by more detailed information on the departmental performance measures and initiatives. Below are detailed steps for preparing this report. If you have any technical difficulties running this report, please call OMB. See the next section for steps to complete the Business Plan Report.

1. Departmental Scorecard Objectives

Departmental objectives are aspirational and measurable statements that translate how your major activities support the goals and objectives of the Strategic Plan. They should be written in a way that can be easily understood and relatable to departmental operational staff. The following examples provide clear, aspirational, and measurable statements of objectives:

- *Reduce fire rescue dispatch time (aligned to Strategic Plan Objective PS2-1: Minimize response time)*
- *Increase positive outcomes for pets (aligned to NI1-5: Ensure animal health and welfare)*
- *Manage the effective use of Housing Choice Vouchers (aligned to HS2-1: Provide the necessary support services to residents in need)*

To develop departmental objectives, department staff should take the following steps:

1. Identify the goals and associated objectives from the County's Strategic Plan that the department most directly supports. The full list of the County Strategic goals and objectives can be found in SMS and the [Strategic Plan Goals and Objectives document](#).
2. Evaluate departmental operations and key objectives, and identify those programs, activities, or any associated initiatives that support the achievement of the County Strategic Plan objectives.
3. Validate the departmental objectives on your scorecard. Check to see if they are linked to the correct strategic plan goal or objective. Please contact OMB if the objectives on your departmental scorecard need to change (added or removed) or if you believe the linkages to the Miami-Dade County Strategic Plan are incorrect, or new linkages need to be made.
4. Organize your objectives using common balanced scorecard perspectives:
 - a. Customer: objectives related to residents and your customers
 - b. Financial: objectives related to your budget and key revenue and cost drivers
 - c. Internal: objectives related to processes that impact (a) and (b) above
 - d. Learning and Growth: objectives related to your employees, their professional development and skill levels

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Departmental Objectives should be linked to the correct “Parent Objective” in the Strategic Plan.

2. Performance Measures and Targets

Performance measures must be established to assess how well departments are meeting their objectives as well as the goals and objectives included in the County Strategic Plan. Performance measures must also include *targets* that support achievement of the Strategic Plan.

Performance measures should focus on desired outcomes or an activity’s efficiency. Input and output measures are of secondary importance. As a best practice, all performance measures in the SMS must contain a clear and brief description of how the measure is calculated, what the measure is measuring, and on the source of the information used to calculate the performance measure.

The [Miami-Dade County Performance Measure Standards](#) provide standards for developing scorecard measures.



- Please make sure your scorecard objectives display the correct measures.
- **The measures should have targets set and locked in the SMS through FY 2026-27.** Please verify that annualized targets are correct.
- Ensure that measures appearing on the **Mayor’s Executive Dashboard** and the **Strategic Plan scorecard** are included in the Business Plan Report.

3. Scorecard Initiatives

- Reassess all your current initiatives, including your Priority Initiatives identified during your planning process and listed in your business plan. **Priority Initiatives should be tracked in SMS and shown on your department scorecard.**
- You can remove initiatives from the SMS that are complete. Contact OMB for guidelines on archiving these completed initiatives.
- Make sure measure and initiative owners are up-to-date.

Finalizing the Business Plan Report

- You may generate a PDF version of the Business Plan Report in the County's SMS for ease of internal review. The [Instructions for Printing the Business Plan Report](#) contain step-by-step instructions.
-  **New:** When you submit your Business Plan through SMS, you will be required to acknowledge that the Business Plan Report is complete. **OMB will save the document as a PDF and append it to your submitted Business Plan Narrative.**