



OFFICE OF THE STATE PUBLIC DEFENDER STATE OF MONTANA

Steve Bullock
Governor

MEMORANDUM

TO: Montana Public Defender Commission

FROM: Harry Freebourn

DATE: April 2, 2015

RE: Business Plan Format and Process

This memorandum describes a business planning format and process. A business plan provides a road map for the agency to follow to successfully meet its mission and helps the agency attain resources by showing various interest groups that it has a well thought out plan.

Executive Summary – a one or two page summary of all the key items noted below. This is used as a communication tool and is written to be understood by a wide audience with many different interests and backgrounds.

Vision Statement – states where the agency is heading and the keys to the agency’s success in attaining its mission. Where do we want to go and what does it take to be successful?

Mission Statement – states the purpose of the agency. What is it tasked to do and why is it important?

Goals and Objectives – this is one of the most important parts of the business plan as it looks at the vision and mission and identifies specific goals and related objectives to meet both. These should be specific and measurable and have milestones.

Services Provided by the Agency – this identifies the agency’s services and clients and under what authority it is tasked to serve them. Why are these services important? What happens if the service is not available?

Description of the Agency’s Organizational Structure and Operating Plan – this identifies the agency’s reporting structure and how it wants to organize to serve its vision, mission, goals, clients, etc. This area includes locations of service and staffing strategies. How does the agency intend to operate to serve its clients and where?

The Arena Where the Agency Operates – this identifies the Montana legal justice system, its players, and how the agency interacts with them to meet its mission. It also identifies its stakeholders, their interests in the agency, and their expectations as to how the agency interacts

with them to serve their interests. Interest groups may include the legislature, the courts, county/city attorney offices, law enforcement, the ACLU, the union, etc. What do each expect from the agency?

The Agency's Strengths, Weaknesses, Opportunities, and Threats – this is an analysis of what the agency does well, what it does not do well and strategies to improve, the opportunities and threats it faces.

The Agency's Key Positions – this section identifies key positions that are necessary to develop and implement the agency's goals and objections, including detailed plans. Includes the commissioners, management, and staff.

The Agency's Long Term Financial Plan – given the above noted vision, mission, agency goals, etc., how much will it cost to get it right and when? This can be based on more than one scenario created on various assumptions (caseload growth, availability of resources, etc.)

Discussion of Key Milestones - what are they and when?

Appendix – includes all backup.