STRATEGY MARKUP LANGUAGE SUMMARY & RESULTS WHITEPAPER

Strategy Markup Language Community of Practice

September 6, 2007

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1. EXECUTIVE SUMMARY

A group of government and industry partners, collectively known as the Strategy Markup Language (StratML) Community of Practice (CoP), has completed the initial framework with which Federal agency strategic plans are created, structured, shared, and accessed by stakeholders. The primary output of the StratML CoP is a vocabulary, schema based upon Extensible Markup Language (XML), and search prototype for use by government agencies.

The benefits of StratML include, but are not limited to:
1. Standardized solution for Congress, Office of Management and Budget (OMB), and Federal agencies to comply with the Government Performance & Result Act (GPRA, P.L. 103-62).
2. Decreased time and resource commitment from Federal agencies;
3. The establishment of a line of site from strategic goals and objectives to specific actions and resources;
4. The efficient and intuitive search and discovery of strategic plans, actions, and records, as well as sharable services and strategic alignments;
5. The enhanced application of content for reporting and research;
6. The sharing, referencing, indexing, discovery, linking, reuse, and analyses of the elements of strategic plans;
7. The discovery of potential performance partners who share common goals and objectives;
8. The facilitation of stakeholder feedback on strategic goals and objectives;
9. The improved maintenance and management of strategic plans; and,
10. The reduction in resources associated with maintaining redundant data "stovepipe" systems.

The StratML CoP has developed this whitepaper to summarize the progress and results of the project for its oversight committee – the Architecture and Infrastructure Committee (AIC) of the Chief Information Officer's Council (CIO-C). The terms and acronyms used throughout this whitepaper are defined in Appendix B.

2. STRATEGIC PLANNING & PERFORMANCE MANAGEMENT – CURRENT STATE

The United States government is the single largest enterprise in the world. It has expanded uninterrupted in breadth and depth throughout its history and continues to grow in the 21st century. At several points in the last century, leaders in Congress and in the Executive branch have reformed government to improve the effectiveness, efficiency, and economy of the vast array of Federal programs. One such reform came through the adoption of Strategic Planning and Performance Management (SPPM).

Strategic planning is the process of specifying an organization's vision, goals and objectives, developing policies and plans to achieve these objectives, and allocating resources to them. Performance management builds upon this foundation by collecting, assessing, communicating the progress achieved toward achieving the organization's goals and objectives.

In 1993 Congress enacted GPRA, which outlined a comprehensive, cooperative, and continuing approach to strategic planning (5 USC 306) and performance management (31 USC 1115 & 1116). It requires that every Federal agency compile, institutionalize, and execute strategic plans and regularly report on their outputs and outcomes through performance plans and performance reports. Collectively these three documents comprise the strategic management portfolio.

Congress envisioned a wide range of tangible and intangible benefits arising from the institutionalization of GPRA mandates including: improved governance and program effectiveness, cost efficiencies, tighter internal agency management, enhanced decision making in Congress and across Federal agencies, and greater public accountability because of a focus on results, service quality, and customer satisfaction.

Despite this breakthrough, gaps still exist in the SPPM process because GPRA did not standardize the structure and terminology used by agencies to develop their strategic management portfolios. Agencies do not adhere to a common structure despite technical advances that would make the development, maintenance, use, dissemination and access of portfolios more efficient and effective. In addition,

portfolios are often isolated in proprietary systems and formats developed in agency specific lexicons for generic management terms, meaning that the information cannot be readily shared. These challenges have led the Government Accountability Office (GAO) to find the status quo unacceptable (http://www.fcw.com/article80979).

In order for strategic goals and objectives to be effectively communicated and pursued in a consistent, repeatable manner, a common language is required. The vernacular must span the entire strategic management portfolio, including defining cause-and-effect relationships among strategic themes. Ultimately this understanding leads to strategic accountability and governance that assists organizations in achieving, measuring, and reporting their results.

Congressional legislation supports this claim and the E-Government Act of 2002 (eGov Act, P.L. 107-347) highlights what agencies must do to meet goals both individually and collectively:

> "Agencies shall **link** their **performance goals** ... **to key groups**, including citizens, businesses, and other governments, and to internal Federal Government operations." [Sec. 202(b) (4)]
>
> "... **agencies shall work collectively** in linking their performance goals to groups … and shall use information technology in delivering Government information and services to those groups." [Sec. 202(b) (5)]

3. STRATEGY MARKUP LANGUAGE – THE SOLUTION

StratML is envisioned as the standardized solution to the challenge. StratML is a XML schema and vocabulary for the strategic management portfolio that is aligned with GPRA guidelines that is available for Federal agencies use. StratML is a technology solution that complements the GPRA policy and is expected to yield significant impacts for stakeholders within Federal agencies, private industry, and the public.

StratML has been developed by a group of government and industry partners known as the StratML CoP. This group was formally established by the Emerging Technology subcommittee (ET) of the AIC of the CIO-C in June 2006. The CoP's first deliverable was the *Strategy Markup Language Value Proposition,* April 18, 2006, which outlined the full context and details of the project. This whitepaper summarizes the CoP's work to date and proposed next steps.

GPRA policy and procedures coupled with StratML will enable agencies to plan, manage, perform, and report in a standard and streamlined fashion. The XML-based implementation of StratML is based on fully open electronic standards and has no reliance on proprietary software or data formats to produce, view, edit or manage StratML documents. This means that StratML documents are highly interoperable, forward compatible and can be easily imported into any standards-based software system. Strategic management portfolios and their information can also be applied to a wide range of potential uses, including applications not yet conceived by the CoP.

The StratML CoP is moving forward to develop and StratML for the Federal government in three sequential phases. The purpose and main outcomes of each phase are outlined below:

- In **Phase 1A (completed)** the CoP has drafted elements and definitions deemed essential (core) to any strategic plan regardless of organization type. These elements are logically structured into an XML schema that is consistent with the intent, purpose, and lexicon of the GPRA and best practices of the SPPM process**.**

- In **Phase 1B (completed)** the vocabulary and schema has been tested with 47 strategic plans, including more than two dozen agency plans as well as the President's Management Agenda (PMA), the CIO-C strategic plan, the Federal Enterprise Architecture (FEA) Program Management Office's (PMO) action plan, and the strategic plans of several non-profit, public service organizations. The goal and objective statements contained in those plans were rendered in XML and the capability to search for and discover related goals and objectives across agencies has been demonstrated. The results of this analysis are in Section 6 of this whitepaper.

- In **Phase 1C** the CoP is seeking review, comment, and approval of the Phase 1 vocabulary and schema by the AIC, CIO-C, Chief Financial Officer's Council (CFO-C), and OMB for inclusion in the National Information Exchange Model (NIEM). As part of this effort, it is requested that the AIC lead the recruitment from these organization's to get them actively involved in the review and continued development of StratML.

- In **Phase 2A** the CoP will incorporate additional, optional (non-core) elements, as necessary, to produce a complete vocabulary and schema for strategic plans.

- In **Phase 2B** the CoP will demonstrate and test the additional elements with a number of agency strategic plans.

- In **Phase 3A** the CoP, with guidance and participation from AIC, CIO-C, CFO-C, and OMB will extend the vocabulary and schema to include the elements of performance plans and reports.

- In **Phase 3B** the CoP will seek agency volunteers to test the additional elements with their own agency performance plans and reports. The CoP will also encourage industry partners to demonstrate the ability to use the resulting XML documents to aggregate, index, and provide for cross-agency queries and analyses of such reports, in coordination with the Performance Assessment Rating Tool (PART) process and the ExpectMore.gov site.

- In **Phase 4A,** the CoP will draft a User's Guide for StratML for consideration by OMB for potential adoption as a government-wide standard**.** The User's Guide would directly support OMB Memorandum M-06-02, December 16, 2005, with respect to use of FEA Data Reference Model (DRM) to enhance the dissemination of, and access to, government information for the public.

- In **Phase 4B** the CoP will seek agency volunteers to pilot and test usage of the Guide.

- In **Phase 5** the CoP will compile a report on the results of the first four phases and seek AIC, CIO C, CFO-C, and OMB approval of the entire vocabulary and schema for incorporation in NIEM and issuance of the User's Guide along with policy governing its usage by all Executive branch agencies.

4. STRATEGIC PLANNING & PERFORMANCE MANAGEMENT – THE FRAMEWORK

The business and technical sides of GPRA, the SPPM process, and StratML are complex and intertwined. To clarify how these elements tie together, Figure 1 outlines the various plans mandated by GPRA and/or used in the SPPM process. As outlined in the phased project approach, the CoP proposes to develop standardized XML vocabulary and XML schema for Federal agency strategic plans, performance plans, and performance reports.

Figure 1 – Government Performance & Results Act (GPRA) and Strategic Planning & Performance Management (SPPM) Plan Framework
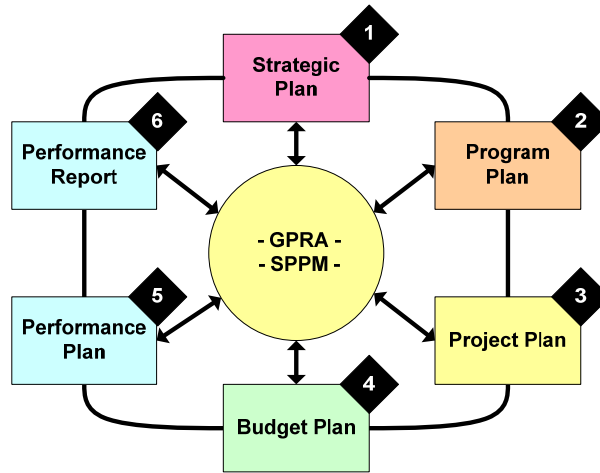

1. **Strategic Plan:** A GRPA mandated plan that outlines the overarching strategy for an organization and embraces fundamentals including its vision, mission statement, and trend indicators towards fulfilling target goals. These core principles and core values of an organization shape its strategic direction. The strategic plan is the framework that determines **WHAT** the agency's sense of direction is and outlines what it is trying to achieve at a distant point in the future. This plan is generally updated every three to five years.

2. **Program Plan:** This plan contains the goals, programs, and outcome metrics that cover a time period of three or more years. This plan spans multiple budget cycles, and addresses the question of **HOW** will the agency deliver the mission and get to the vision via the set of goals and programs.

3. **Project Plan:** This plan incorporates the detail-level elements including objectives, projects, and output measures. It focuses on the upcoming fiscal year and specifies the more tactical and action-oriented information related to the **HOW** of program/project management. Detailed project/work plans with well-defined tasks, schedule, milestones, deliverables, roles and responsibilities, are necessary at this stage to enable agency managers and staff to systematically execute and monitor the projects.

4. **Budget plan:** This plan is a one to three year estimate of the fiscal revenues and costs related to achieving goals and objectives set forth in the program plan and project plan. Budgets can only be estimated reasonably if the scope and resource requirements of the mid-term programs and their component short-term projects are defined at a granular level. In this regard, the budget plan deals with the question of **HOW MUCH** monetary and non-monetary resource inputs will the agency need to complete the projects and programs so as to meet the objectives and goals, respectively. Such budget information is typically included in OMB's Exhibit 300.

5. **Performance Plan:** A GPRA mandated plan that specifies the input measures, output measures, outcome metrics, and trend indicators that allow an organization to track the effectiveness and efficiency of projects and programs. The performance plan measures **TO WHAT DEGREE** an organization is attaining vision, goals, and objectives throughout a year and over successive years.

6. **Performance Report:** A GPRA mandated plan that requires organizations to review the success and failures of meeting goals and objectives as stated in their annual performance plan.

In short, these six building blocks of the GPRA and SPPM process comprise the foundation for StratML. As outlined in Figure 2, each of the blocks also include a horizontal and/or vertical hierarchy of related

elements that comprise **WHAT** an organization wants to achieve (objectives>goals>vision), **HOW** it wants to do so (projects>programs>mission), and **TO WHAT DEGREE** it is accomplishing, or has succeeded in attaining its targets (output metrics>outcome metrics>trend indicators). The construction of the standardized XML schema and vocabulary hinges on these horizontal and vertical hierarchies and their interdependencies.

Figure 2 – Government Performance & Results Act (GPRA) and Strategic Planning & Performance Management (SPPM) Element Framework
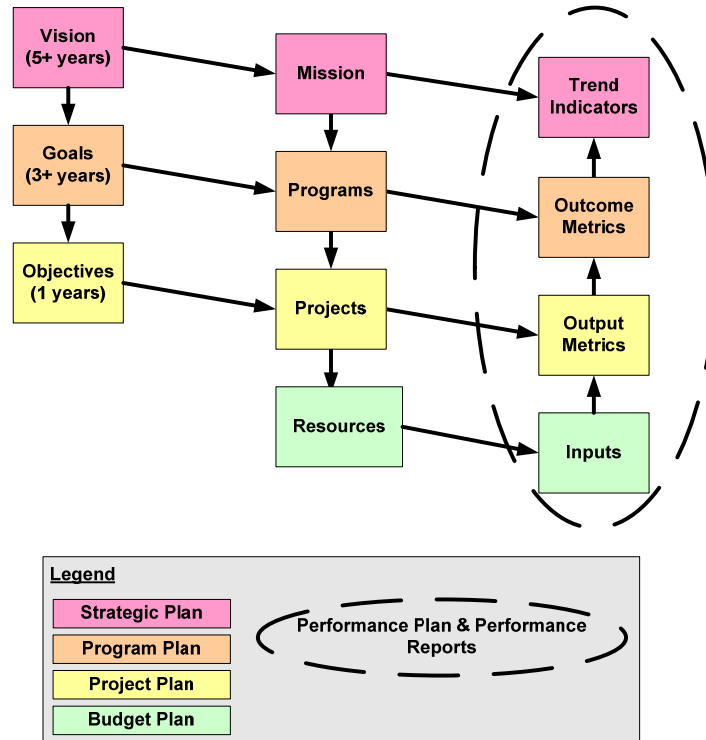
5. STRATML STRATEGIC PLAN

As previously stated the CoP has completed Phase 1A of StratML and has developed elements and definitions deemed essential (core) to any strategic plan (available in Appendix C). These elements have been structured into an XML schema using the GEFEG.FX XML editing and data modeling software (http://www.gefeg.com/en/index.htm). The schema is consistent with the intent, purpose, and lexicon of the GPRA and best practices of the SPPM process. This strategic plan schema will be referred to as the core schema from hereon out.

As outlined in Figure 3, the core schema is structured into a hierarchy with five different element categories. Each category contains multiple elements that are designated as mandatory or optional depending on their perceived importance. In addition, some elements can be repeated to add multiple occurrences of the same element (e.g., multiple goal statements, vision statements). The core schema can be also expanded to include other elements as deemed necessary by oversight organizations or policy.

The element categories and high level descriptions include:
1. **Plan Elements:** Timeframe and the publish date of the strategic plan.
2. **Submitter Elements:** Information about the author or submitter of the strategic plan.
3. **Organization Elements:** Information about the submitting organization including its mission and vision statements.
4. **Goal Elements:** Goal statement(s) and resources that support the organization's mission.
5. **Objective Elements:** Objective statement(s) that supports goal(s).

Figure 3 – StratML Core Schema Framework
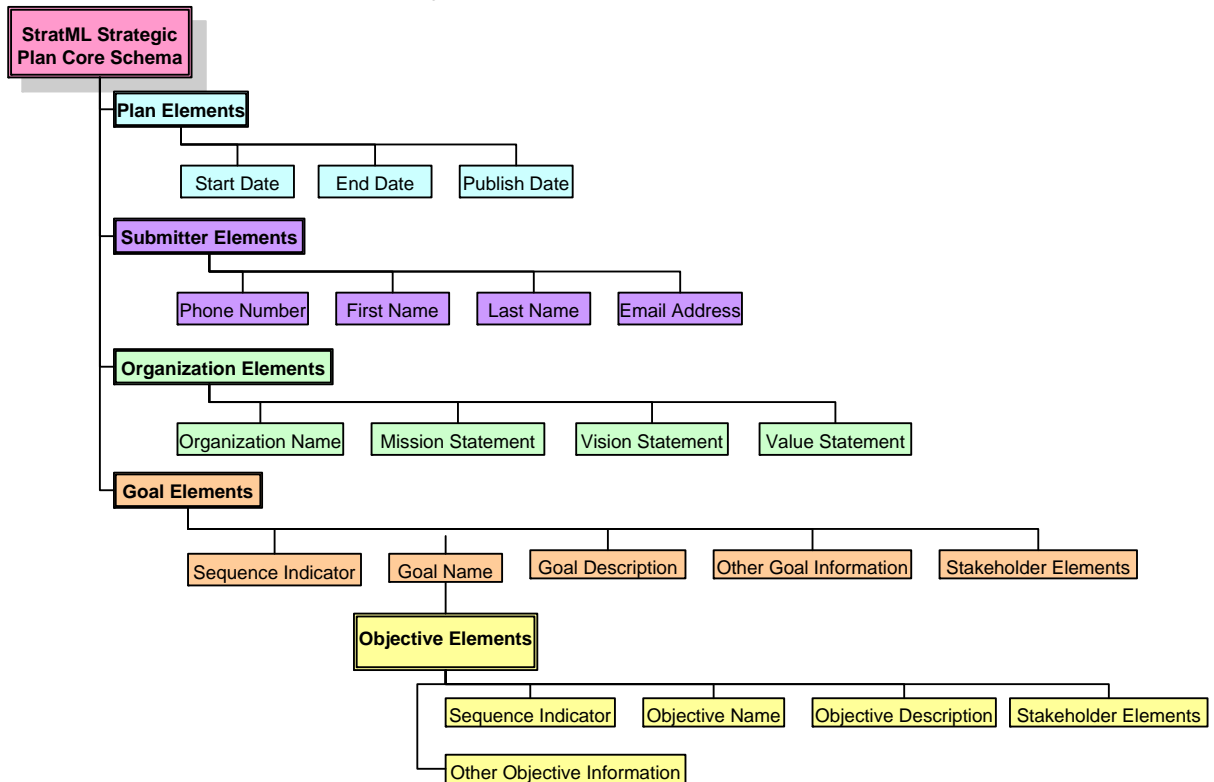
As stated previously, the CoP is seeking review, comment, and approval of the vocabulary and schema by the AIC, CIO-C, CFO-C, and OMB and will incorporate additional, optional (non-core) elements, as necessary, to produce a complete vocabulary and schema for strategic plans.

6. SEARCH & DISCOVERY RESULTS

The CoP has completed Phase 1B of StratML by testing the vocabulary and schema with 47 select strategic plans. The goal and objective statements contained in those plans were rendered in XML using Business Web Software's AchieveForms, Microsoft InfoPath, and an Adobe Portable Document Format (PDF) fillable form. The XML instance documents and forms are available at links below and at the XML Community of Practice's StratML site (http://xml.gov/stratml/index.htm) and are as follows:

- Microsoft InfoPath Rendered Strategic Plans:
  1. President's Management Agenda (PMA)
  2. Federal Enterprise Architecture Program Management Office (FEA PMO)
  3. Federal Enterprise Architecture Business Reference Model (FEA BRM)
  4. CIO Council (CIOC)
  5. Department of Agriculture (USDA)
  6. U.S. Army Corps of Engineers (USACE)
  7. Department of Energy (DOE)
  8. Federal Emergency Management Agency (FEMA)
  9. Government Accountability Office (GAO)
  10. Department of Health and Human Services (HHS)
  11. Department of the Interior (DOI)
  12. Department of Housing & Urban Development (HUD)
  13. National Aeronautics and Space Administration (NASA)
  14. National Oceanic and Atmospheric Administration (NOAA)
  15. Library of Congress (LOC)
  16. Small Business Administration (SBA)

- Business Web Software AchieveForms Rendered Strategic Plans:
    17. Agricultural Research Service (ARS)
    18. Department of Education (ED)
    19. Department of Energy (DOE) Information Resources Management (IRM)
    20. Environmental Protection Agency (EPA)
    21. Federal Aviation Administration (FAA)
    22. U.S. Fish and Wildlife Service (FWS) Information Resources Management (IRM)
    23. Government Printing Office (GPO)
    24. Hilton Head Public Service District (HHPSD)
    25. Department of Justice (DOJ)
    26. Department of Labor (DOL)
    27. State of Maine, Office of Information Technology (OIT)
    28. National Archives and Records Administration (NARA)
    29. Office of Personnel Management (OPM) [Edited in InfoPath]
    30. U.S. Patent and Trademark Office (USPTO)
    31. Department of State and U.S. Agency for International Development (USAID)
    32. Department of Treasury (Treasury)
    33. Web Content Managers (WCM)
    34. Association of College and Research Libraries (ACRL)
    35. Center for Democracy and Technology (CDT)
    36. Ethics Resource Center (ERC)
    37. International Digital Enterprise Alliance, Inc. (IDEAlliance)
    38. National Academy of Public Administration (NAPA)
    39. National Association of State Auditors, Comptrollers, and Treasurers (NASACT)
    40. OMB Watch (OMBW)
    41. OpenTheGovernment.org (OTG)
    42. Organization for the Advancement of Structured Information Standards (OASIS)
    43. System Dynamics Society (SDS)

- PDF Fillable Form
    44. CENDI
    45. General Services Administration (GSA)
    46. NIST E-Gov Standards Resource Center (ESRC)
    47. Department of the Interior, Office of the Chief Information Officer, Information Technology (OCIO)

After the strategic plans were rendered, Mark Logic Corporation created a prototype to demonstrate the following capabilities:

- **Ingest:** The 47 sample strategic plans rendered in XML were ingested into the Mark Logic XML Content server. Because these plans are based on well-formed XML documents, these documents were loaded almost instantaneously, without the need of any especial configuration changes or pre-processing steps. As they were loaded on the server, these documents were automatically indexed, and the various tags associated with StratML were identified.
- **Query:** Once ingested, Mark Logic developed an XQuery application that utilizes the native structure of the rendered plans to query the different parts of the strategic plans. For example, the prototype combined the ability to perform full text searches constrained to specific sections (e.g., goals, objectives) or simultaneous querying of multiple sections of the plan. Users of the prototype can view specific sections of the plan that match a query – or the entire rendered plan in a tree view. Based on this basic infrastructure, the prototype demonstrates the ability to bookmark and add user annotations related to the plans they query.
- **Manipulate:** The prototype allows users to build synthetic documents based on selected sections of different plans.

The MarkLogic StratML prototype demonstrates the following benefits of StratML:

- The standardization of the data elements associated with a strategic plan, based on XML, greatly facilitates the process of ingestion, management, discovery and searching of strategic plans.

Government officials and citizens will be able to access strategic plan information with a great degree of uniformity, flexibility and accuracy.
- StratML facilitates the quick repurposing of strategic plan-related information into other products, such as performance plans, with a high degree of granularity.

The StratML prototype is available for limited use by select users. If you would like to access to the prototype, please contact the StratML CoP.

7. STRATML USE CASES

The StratMLCoP expects a wide array of practical uses of StratML. The outcomes would not only improve the SPPM processes of the government but would also the public at large, Congress, Federal agencies, and cross-agency organizations like the CIO-C. The following outlines a portion of the proposed use cases and their benefits:

- **Use Case 1:**
  - **Problem:** Improve the ability for citizens to discover and analyze agency goals and objectives. Currently it is cumbersome to discover related goals and objectives within a single agency or across multiple agencies despite the eGov Act requiring agencies to "link their performance goals **...** to key groups" and to "work collectively" to do so.
  - **Solution:** StratML and related search services will help to make the strategic planning process "citizen centered," as directed by the PMA and eGov Act. Individual goal and objective statements can be readily discovered, along with related goals and objectives, regardless of which agencies are responsible for them. Citizens will then be able to participate more efficiently and effectively in the stakeholder consultation process, as envisioned by GPRA. To the degree that agencies may actually "align" and link their records to their strategic goals and objectives, it will also become possible for citizens to discover all of the information pertinent to their own objectives by searching and browsing agency goal and objective statements and following the links to the information they need.

- **Use Case 2:**
  - **Problem:** Improve the government's processes for oversight, insight, and foresight by holding leaders and managers accountable for delivering results in an effective, efficient, economical, equitable, and ethical manner.
  - **Solution:** Agencies must put their policies, programs, functions, and activities through a fundamental review, reprioritization, and reengineering. StratML can benefit these efforts by providing fast, easy access to standardized information on strategic plans and performance reports emanating from across all civilian and non-civilian agencies, thus enabling the entire federal government to act effectively as a "single enterprise" in accordance with the principles of enterprise architecture.

- **Use Case 3:**
  - **Problem:** Improve government programs and operations as cited by GAO via 36 recommendations for oversight, reform and reengineering of policies/programs, and better governance.
  - **Solution:** StratML can contribute to an agency's execution of GAO recommendations by giving managers easier access to best practices in performance evaluation, including the ways in which agencies employ and make decisions on their assessment of input, output, outcome, and trend measures.

- **Use Case 4**:
  - **Problem:** Enable linkages and analysis between initiatives within the PMA and associated Scorecard. The Scorecard is designed to track how agencies are executing five government-wide initiatives: human capital, competitive sourcing financial performance, E-government, and budget/performance integration.
  - **Solution:** With StratML, agency leaders and managers will be able to cross-compare and analyze goals and objectives, programs and projects, as well as inputs, output metrics,

outcome metrics across PMA participant agencies. In turn, OMB will have a more objective method to monitor and report progress in its Scorecard toward implementing the PMA.

- **Use Case 5:**
  - o **Problem:** Improve the development, management, structure of the strategic management portfolio by are expressed statements using technology other than PDF or Microsoft Word (.doc).
    Solution: Documenting strategic goal and objective statements in XML will enable linkage of the records of agency activities and results to the goals and objectives to which they apply. It will also become easier to update and maintain individual elements without having to obtain full review and clearance of the entire document.

8. CONCLUSION

The principal objectives of the StratML CoP are 1) to create a standardized XML schema and vocabulary for the strategic plans, performance plans, and performance reports that Federal departments and agencies are required to prepare and use in compliance with GPRA, and 2) to provision fast, easy access to information on the SPPM processes of government organizations.

We believe that the business and technology outcomes of StratML will enable the Federal government to progress rapidly toward a unified StratML vision. In this vision, end-users within and outside government will have fast, easy, and standardized access to the disparate, dispersed, and (un)structured strategic management portfolio documents of all Federal agencies. In addition, it will provide Congress and OMB a standardized toolset that could assist Federal agencies GPRA compliance.

The CoP recognizes that the StratML is not a "silver bullet" to address the complex planning, management, and operations issues within the federal government. Yet, it is the access and dissemination of SPPM information that will help to foster, over the long term, greater effectiveness, efficiency, economy, equitability, and ethical accountability, and transparency within the United States government. Since the success of StratML relies on the communication, participation, and support of numerous people and organizations, the CoP requests that the AIC review this whitepaper and comment on the progress made to date along with the proposed next steps.

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APPENDIX A - REFERENCES

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- Achieve Forms, http://www.businesswebsoftware.com/Products/AchieveForms/
- Microsoft InfoPath, http://office.microsoft.com/en-us/infopath/FX100487661033.aspx?ofcresset=1
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- XML Community of Practice's StratML website, http://xml.gov/stratml/index.htm
- MarkLogic, http://www.marklogic.com/
- XML Community of Practice, http://xml.gov/cop.asp#stratplans
- President's Management Agenda Scorecard, http://www.whitehouse.gov/results/agenda/scorecard.html

APPENDIX B – GLOSSARY & ACRONYMS

Glossary

Community of Practice (CoP): A group coalescing around collaborative action in pursuit of a common, measurable objective.

Extensible Markup Language (XML): An international voluntary consensus standard for information formatting that provides a flexible way to share data across organizations without regard to proprietary constraints associated with any particular information system, product, or technology.

Performance Management: the collecting, assessing, communicating the progress achieved toward achieving the organization's goals and objectives.

Performance Plan: A companion document to a strategic plan that outlines an organization's annual performance objectives, resource utilization, and performance metrics.

Performance Report: A companion document to a performance plan that reports the results achieved by an organization based upon its objectives for the previous year.

Strategic Management Portfolio: An agency's strategic plan, performance plan, and performance report.

Strategy Markup Language (StratML): An XML vocabulary and XML schema for Federal agency strategic management portfolios (and potentially for use by organizations worldwide, as an international voluntary consensus standard).

Strategic Plan: A document used by an organization to align its organization and budget structure with organizational priorities, missions, and objectives.

Strategic Planning: the process of specifying an organization's vision, goals and objectives, developing policies and plans to achieve these objectives, and allocating resources to them.

Strategic Themes: Value propositions that define the cause-and-effect relationships linking objectives, measures, and initiatives across multiple strategic perspectives.

XML Schema: A description of an XML document that defines vocabularies, structure, and rules by which elements within an information set are interrelated and against which validity (conformance) can automatically be determined.

Acronyms

Acronym	Definition
AIC	Architecture and Infrastructure Committee
CFO-C	Chief Financial Officer's Council
CIO-C	Chief Information Officer's Council
CoP	Community of Practice
DRM	Data Reference Model
eGov Act	E-Government Act of 2002
ET	Emerging Technology Subcommittee
XML	Extensible Markup Language
FEA	Federal Enterprise Architecture
GAO	Government Accountability Office
GPRA	Government Performance & Result Act
NIEM	National Information Exchange Model
OMB	Office of Management and Budget
PART	Performance Assessment Rating Tool
PDF	Portable Document Format
PMA	President's Management Agenda
PMO	Program Management Office
StratML	Strategy Markup Language
SPPM	Strategic Planning and Performance Management

APPENDIX C – STRATML CORE SCHEMA & VOCABULARY

(please see next page)

Guideline

Elements	St	Occurrence	Annotations	
StrategicPlanCore	M		Type:	*Element*
— *StartDate*	O		Type: xsd:date Use: optional Format: xsd:date	*Attribute*
			Description: The year, month and day the element with which it is associated is scheduled to begin.	
— *EndDate*	O		Type: xsd:date Use: optional Format: xsd:date	*Attribute*
			Description: The year, month, and day the element with which it is associated is projected to cease, if it is not subsequently extended.	
— *Date*	O		Type: xsd:date Use: optional Format: xsd:date	*Attribute*
			Description: The day, month, and year a strategic plan was issued.	
xsd:sequence	M	1..1	Type:	*ContentModel*
Submitter	O	0..1	Type:	*Element*
			Description: The person submitting the plan.	
			Name: **Author**	
— *FirstName*	O		Type: xsd:string Format: xsd:string	*Attribute*
			Description: First name of the person submitting the plan.	
— *LastName*	O		Type: xsd:string Format: xsd:string	*Attribute*
			Description: Last name of the person submitting the plan.	
— *PhoneNumber*	O		Type: xsd:string Format: xsd:string	*Attribute*
			Description: Phone number of the person submitting the plan.	
— *EmailAddress*	O		Type: xsd:string Format: xsd:string	*Attribute*
			Description: Email address of the person submitting the plan.	
Source	O	0..1	Type: xsd:anyURI Format: xsd:anyURI Remark: The Web address (URL) for the authoritative source of this document.	*Element*
Organization	M	1..1	Type:	*Element*
			Description: The legal or logical entity to which the plan or report applies.	
			Name: **Agency**	

St = Status: M=Mandatory, O=Optional

Guideline

Elements	St	Occurrence	Annotations		
└─ **xsd:sequence**	M	1..1	Type:		*ContentModel*
└─ **Name**	M	1..1	Type: Format:	xsd:string xsd:string	*Element*
			Description:	A word or short phrase intended to identify a concept within the context in which is it being applied.	
└─ **Acronym**	O	0..1	Type: Format:	xsd:string xsd:string	*Element*
			Description:	An abbreviation of a proper name, usually composed of the first letters of each word in the name.	
└─ **Vision**	O	0..unbounded	Type: Format:	xsd:string xsd:string	*Element*
			Description: Remark:	A concise and inspirational description of a state the organization will strive to approach over a relatively long span of years but which can ultimately never be fully achieved. Vision statements are distinguished from goals in that they are the focus of constant pursuit but can never be satisfied in the sense of being met or completed.	
└─ **Mission**	O	0..unbounded	Type: Format:	xsd:string xsd:string	*Element*
			Description:	A brief description of the basic purpose of the organization.	
			Name: Remark:	**MissionStatement** An agency's goals should flow from the mission statement.	
└─ **Value**	O	0..unbounded	Type:		*Element*
			Description:	A principle that is important and helps to define the essential character of the organization.	
└─ **xsd:sequence**	M	1..1	Type:		*ContentModel*
└─ **Name**	M	1..1	Type: Format:	xsd:string xsd:string	*Element*
			Description:	A word or short phrase intended to identify a concept within the context in which is it being applied.	
└─ **Description**	O	0..1	Type: Format:	xsd:string xsd:string	*Element*
			Description: Remark:	A sentence or short paragraph defining and explaining a concept. Applicable to all elements.	
└─ **Goal**	M	1..unbounded	Type:		*Element*
			Description:	A relatively broad statement of intended results to be achieved over more than one resource allocation and performance measurement cycle.	
			Name: Remark:	**General Goal** Goals define a purpose and direction and take all stakeholders and perceived present and future needs into account. Goals must be capable of being effectively pursued with measurable results over more than one budgetary execution cycle but within the reasonably	

St = Status: M=Mandatory, O=Optional

Guideline

Elements	St	Occurrence	Annotations	
			foreseeable future. Goals should be objective, quantifiable, measureable, and defined at the level to be achieved by a program activity. Supports Mission	
xsd:sequence	M	1..1	Type:	*ContentModel*
SequenceIndicator	O	0..1	Type: xsd:string Format: xsd:string	*Element*
			Description: An alphanumeric identifier applied to an element to designate its order in a series.	
Name	O	0..1	Type: xsd:string Format: xsd:string	*Element*
			Description: A word or short phrase intended to identify a concept within the context in which is it being applied.	
Description	M	1..1	Type: xsd:string Format: xsd:string	*Element*
			Description: A sentence or short paragraph defining and explaining a concept. Remark: Applicable to all elements.	
Stakeholder	O	0..unbounded	Type:	*Element*
			Description: An individual whose interests may be affected by or whose action may be required in order to achieve a goal or objective.	
xsd:sequence	M	1..1	Type:	*ContentModel*
Name	O	0..1	Type: xsd:string Format: xsd:string	*Element*
			Description: A word or short phrase intended to identify a concept within the context in which is it being applied.	
Description	O	0..1	Type: xsd:string Format: xsd:string	*Element*
			Description: A sentence or short paragraph defining and explaining a concept. Remark: Applicable to all elements.	
Objective	O	0..unbounded	Type:	*Element*
			Description: A target level of results expressed in units against which achievement is to be measured within a single resource allocation and performance execution cycle.	
			Name: **Performance Goal Strategy**	
			Remark: Supports Goal Objectives are measureable subsets of goals to be achieved within a given time period with available resources. Objectives provide the day-to-day support for achieving goals.	
xsd:sequence	M	1..1	Type:	*ContentModel*
SequenceIndicator	O	0..1	Type: xsd:string Format: xsd:string	*Element*

St = Status: M=Mandatory, O=Optional

Guideline

Elements	St	Occurrence	Annotations		
			Description:	An alphanumeric identifier applied to an element to designate its order in a series.	
Name	O	0..1	Type: Format:	xsd:string xsd:string	*Element*
			Description:	A word or short phrase intended to identify a concept within the context in which is it being applied.	
Description	M	1..1	Type: Format:	xsd:string xsd:string	*Element*
			Description: Remark:	A sentence or short paragraph defining and explaining a concept. Applicable to all elements.	
Stakeholder	O	0..unbounded	Type:		*Element*
			Description:	An individual whose interests may be affected by or whose action may be required in order to achieve a goal or objective.	
xsd:sequence	M	1..1	Type:		*ContentModel*
Name	O	0..1	Type: Format:	xsd:string xsd:string	*Element*
			Description:	A word or short phrase intended to identify a concept within the context in which is it being applied.	
Description	O	0..1	Type: Format:	xsd:string xsd:string	*Element*
			Description: Remark:	A sentence or short paragraph defining and explaining a concept. Applicable to all elements.	
OtherInformation	O	0..1	Type: Format:	xsd:string xsd:string	*Element*
			Description:	Additional explanation or guidance about an element that is not expressly addressed in other elements of the schema.	
			Name:	**Reference Field**	
OtherInformation	O	0..1	Type: Format:	xsd:string xsd:string	*Element*
			Description:	Additional explanation or guidance about an element that is not expressly addressed in other elements of the schema.	
			Name:	**Reference Field**	

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