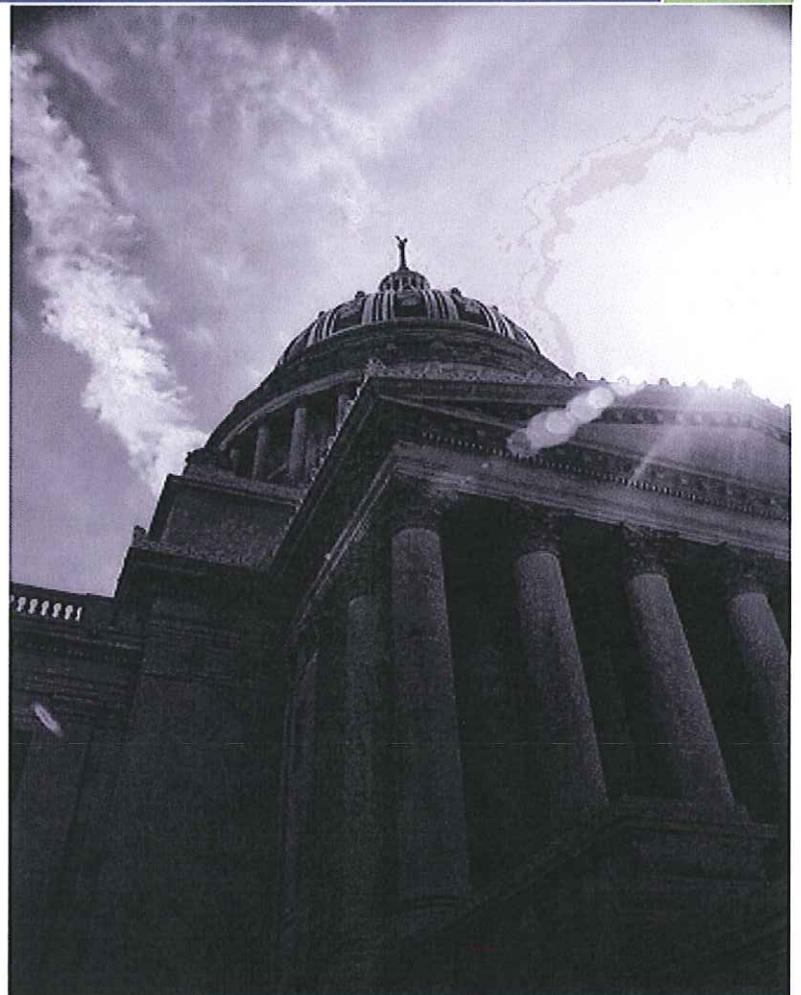


**FY 2010**

**SECRETARY'S PLANNING GUIDANCE**



**ROBERT W. FERGUSON, JR.**

**CABINET SECRETARY**

**DEPARTMENT OF ADMINISTRATION**

**STATE OF WEST VIRGINIA**



# NO BATTLE PLAN SURVIVES CONTACT WITH THE ENEMY.

- *MOLTKE THE ELDER*

Count Helmuth Karl Bernhard Graf von Moltke, one of the great war strategists of the late 19<sup>th</sup> century, created the modern military strategies still used today. He adopted a practical view of strategy:

**Adapting means to ends.**

As a large organization, it is imperative that we plan for the coming year and beyond; however, it is just as important that we remain flexible both on a personal and organizational level to adapt to unforeseen future events.

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## Directors, Senior Staff, Managers, and Employees:

As your cabinet secretary, I am proud to serve with you during these challenging economic times and in this changing social landscape. While we face many tough decisions in the coming year, I encourage you to view this time as one of great opportunity – an opportunity to continue shaping the Department of Administration with a culture of service and accountability. Together, we can seize the opportunity today to create a lasting legacy for tomorrow and the next generation of West Virginians.



Last year, I issued the first edition of my planning guidance in support of the Department of Administration's mission: **To operate a cost-efficient, customer-oriented service department whose actions are transparent to taxpayers, resulting in innovative solutions and quality results for a government that effectively serves West Virginians.** We made great strides towards the achievement of all seven objectives detailed in that document and will continue to do so during the coming years.

This year's planning guidance is in a more concise form to complement the governor's strategic plan for the state. Our vision and mission must support that of the governor. To that end, this planning guidance begins with the governor's statewide strategic plan. Put simply, the plan outlines where Gov. Joe Manchin III envisions the state of West Virginia in 2012 and includes the necessary steps to make that vision become a reality. As you will see, the plan's objectives encompass all executive branch departments, including the Department of Administration.

The following objectives directly support the governor's strategic plan and will move West Virginia toward his Vision 2012. Please read this planning guidance document and center both your organization's activities and your daily work around your agency's mission and the objectives in this guidance.

**To all members of the department:** Today, we move from not only documenting tangible successes like those listed in the department's savings log, but to also measuring progress toward established goals through performance metrics. This shift will allow all our successes to be more transparent as we communicate to our customers, state government, and the public.

I look forward to the many opportunities that we will embrace and to the many challenges we will overcome as we work together over the next year.



*Montani Semper Liberi,*

A handwritten signature in blue ink that reads 'Robert W. Ferguson, Jr.'.

Robert W. Ferguson, Jr.  
Cabinet Secretary  
Department of Administration

# GOV. JOE MANCHIN'S WEST VIRGINIA: VISION 2012

## *THE STATEWIDE STRATEGIC PLAN FOR WEST VIRGINIA*

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**In 2012, I envision healthy, educated West Virginians who live in safe, modern communities that are part of a growing, diverse economy and served by a responsible state government.**

To that end, it is my administration's aim to

### **I. Strengthen West Virginia's education system.**

- A. Increase high school graduation rates.
- B. Improve student achievement through the development and implementation of innovative approaches to teaching and learning.
- C. Increase access to and participation in early childhood and pre-K programs to prepare every kindergartener to begin a successful educational career.
- D. Promote and increase post-secondary education and training to create a better skilled workforce.

### **II. Increase West Virginians' access to quality and efficient health care.**

- A. Provide increased access to preventive services to improve the health of citizens.
- B. Promote and increase the use of automated records to increase accountability in the health care system.
- C. Afford greater access to health care through telemedicine.
- D. Promote healthier lifestyles and increase personal responsibility when receiving care.
- E. Educate young people on the importance of maintaining a healthy lifestyle.
- F. Develop a single point of entry for long-term care for adults with disabilities and those over the age of 60.

### **III. Increase the accountability of state government agencies to achieve better, measurable results.**

- A. Engage all agencies in the strategic planning process and begin the implementation of performance-based budgeting.
- B. Keep West Virginia's per capita combined state and local tax burden below the national average.

- C. Improve or maintain the state's credit ratings.
- D. Develop and test statewide Continuity of Operations and Continuity of Government plans.
- E. Reduce the energy consumption of state government agencies by 10 percent.
- F. Create a statewide strategic workforce plan that includes succession planning.
- G. Implement a shared services model across executive branch departments.

**IV. Expand West Virginia's economy.**

- A. Attract more employers and more jobs to the state.
- B. Raise the state's labor force participation rate.
- C. Encourage out-of-state West Virginians to come home.
- D. Increase the state's economic diversity.
- E. Encourage more efficient land use planning.

**V. Diversify West Virginia's energy portfolio while expanding energy exports.**

- A. Promote the continued viable use of coal.
- B. Improve the electrical grid system by developing a smarter system.
- C. Continue to develop alternative and renewable energy sources.

**VI. Modernize and maintain the safety of West Virginia's infrastructure.**

- A. Increase the safety of roads in both rural and urban communities.
- B. Complete ongoing and planned road projects.
- C. Improve citizens' access to quality water and sewer services.
- D. Expand access to broadband services.

**VII. West Virginia will be safer.**

- A. Assess, and as necessary, enhance the safety of schools.
- B. Assess and enhance the state's Critical Infrastructure/Key Resource Protection program.
- C. Enhance the state's cyber security.
- D. Make communities more resilient after emergencies.
- E. Reduce recidivism in corrections and adopt effective alternatives.
- F. Enhance West Virginia's role in national security.

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**WEST VIRGINIA 2012: HEALTHY, EDUCATED, VIBRANT**

## **OBJECTIVE 1:**

### **CREATE DIVISION-LEVEL OPERATIONAL PLANS.**

Each division and agency will create its own operational plan to achieve the objectives of this planning guidance document, ultimately in support of the governor's statewide strategic plan.

*Refer to objectives "Customer Relationships" and "Business Continuity" in Secretary's FY2009 Planning Guidance: pages 6-8, 11-13.*

### **RESPONSIBLE PARTIES:**

**All divisions and agencies.**

### **DELIVERABLE:**

Each division will have an operational plan in place to guide its actions through June 30, 2010. The plans must include specific goals that support the secretary's objectives contained in this document and the governor's statewide strategic plan. Accompanying the goals must be quantifiable performance metrics to gauge agency progress during the year. Progress towards agency goals will then be communicated to agency stakeholders.

In addition to agency goals and quantifiable metrics, each plan must include the following components in clearly marked sections:

- An implementation schedule for the drafting and signing of service level agreements (SLAs) with all customers;
- Current agency records retention policies and schedules;
- An action plan to meet all submission deadlines for financial documents required for the state's Comprehensive Annual Financial Report and to eliminate audit findings;
- An action plan to ensure all agency processes are formalized in standard operating procedures (SOPs) and all agency employees are maintaining desktop procedures (DTPs); and
- A plan to reduce the agency's operating budget by five percent (5%).

These plans should be included in the employee performance evaluation process, as they set organizational performance expectations that all employees must work to achieve. **Division of Personnel EPA-1 forms that are used to set performance expectations for the next year must be completed by October 30, 2009 – the same time annual operational plans are due.**

**IN SUPPORT OF GOVERNOR'S STRATEGIC PLAN ITEM III.A.:**

*INCREASE THE ACCOUNTABILITY OF STATE GOVERNMENT AGENCIES TO ACHIEVE BETTER, MEASURABLE RESULTS BY ENGAGING ALL AGENCIES IN THE STRATEGIC PLANNING PROCESS.*



## **OBJECTIVE 2:**

### **IMPLEMENT AN ENTERPRISE RESOURCE PLANNING (ERP) SYSTEM.**

The Office of Technology, in conjunction with other stakeholders in state government, will progress towards the full implementation of a statewide ERP system.

*Refer to objective "Business and Information Technology" in Secretary's FY2009 Planning Guidance: pages 16-17.*

#### **RESPONSIBLE PARTY:**

**Office of Technology.**

#### **DELIVERABLES:**

The Office of Technology, immediately after a statewide governance model that establishes the ERP system's parameters is agreed upon by the constitutionally elected leaders of the executive branch, will offer to assist in the drafting process for the Request for Proposal (RFP) if desired by the other stakeholders in state government. Over the past twenty years, state government created islands of automation - various business systems operate and manage a multitude of disparate business processes. An ERP system standardizes and reduces the versions of software necessary for larger organizations to efficiently and effectively operate by integrating most data and processes required by the organization's essential business functions. The new ERP system will increase the state's transparency and ability to strategically plan.

After approval of a statewide governance model, a RFP development team, consisting of representatives from constitutionally elected officials and other executive branch agencies, will draft and issue a RFP that defines the technological and service needs the state expects when implementing an ERP system. The RFP will seek a vendor capable of implementing an ERP system that meets all of the state's needs while providing quality, efficient technical support.

After responses to the RFP are received, the state team will evaluate the proposals and select the vendor.

After the ERP implementation vendor is selected, the Office of Technology will begin the initial implementation of a statewide ERP system in conjunction with the other stakeholders of state government.

#### **IN SUPPORT OF GOVERNOR'S STRATEGIC PLAN ITEM III:**

*INCREASE THE ACCOUNTABILITY OF STATE GOVERNMENT AGENCIES TO ACHIEVE BETTER, MEASURABLE RESULTS.*

### **OBJECTIVE 3:** **RE-ENGINEER DIVISION OF PERSONNEL PROCESSES.**

The Division of Personnel will:

- Sign service level agreements (SLAs) with customers that establish turn-around times for services;
- Create and implement a strategic workforce plan; and
- Publish a revised classification and compensation system.

*Refer to objective "Maximizing Human Resources" in Secretary's FY2009 Planning Guidance: pages 9-10, 35-37.*

#### **RESPONSIBLE PARTY:**

**Division of Personnel.**

#### **DELIVERABLES:**

1. The Division of Personnel will sign SLAs with its customers. These agreements will, at a minimum, establish turnaround times that provide customers set dates for the performance of services.
2. The Division of Personnel will create a strategic workforce and succession plan to prepare state government for its future human resource needs. The plan must include a process by which all agencies will engage in to meet their particular workforce needs.
3. The Division of Personnel, after working with the internationally recognized Hay Group, will publish a revised classification and compensation system to ensure that West Virginia state government utilizes an internally fair and externally competitive system.

#### **IN SUPPORT OF GOVERNOR'S STRATEGIC PLAN ITEM III.F.:**

*INCREASE THE ACCOUNTABILITY OF STATE GOVERNMENT AGENCIES TO ACHIEVE BETTER, MEASURABLE RESULTS BY CREATING A STRATEGIC STATE WORKFORCE PLAN THAT INCLUDES SUCCESSION PLANNING.*

## **OBJECTIVE 4:**

### **Implement an e-procurement system.**

The Purchasing Division, with the Office of Technology's support, will implement an e-procurement system that will:

- Create a uniform purchasing system throughout the executive branch by utilizing today's advanced technology;
- Allow central reporting for the state's procurement;
- Adopt the Data Universal Numbering System (DUNS number) as the uniform vendor number for the state; and,
- Create a platform that will provide for the procurement of goods and services in a user-friendly and efficient manner.

### **RESPONSIBLE PARTIES:**

**Purchasing Division and Office of Technology.**

### **DELIVERABLE:**

State government will be served by an e-procurement system that connects state purchasing spending units and allows bids to be posted, responded to, and awarded electronically. The system will enable the state to centrally report its procurement, and its mandatory use in the executive branch will bring uniformity and stability to the procurement of goods and services. After a new statewide enterprise resource planning (ERP) system is implemented, the e-procurement system can either be integrated into the ERP system or replaced with a similar ERP module. This e-procurement initiative will provide ease of doing business with the state in addition to streamlining the procurement process by utilizing today's technological capabilities.

The new e-procurement system will replace the current purchasing system, which was partially implemented throughout the executive branch in 1991. Adopting the DUNS number as a uniform vendor number will make the procurement process more efficient and transparent. The new system will also provide more services, such as email notifications on bid opportunities, in a more user-friendly platform.

### **IN SUPPORT OF GOVERNOR'S STRATEGIC PLAN ITEM III:**

*INCREASE THE ACCOUNTABILITY OF STATE GOVERNMENT AGENCIES TO ACHIEVE BETTER, MEASURABLE RESULTS.*

## **OBJECTIVE 5:**

### **BEGIN IMPLEMENTATION OF A STATEWIDE RECORDS MANAGEMENT SYSTEM.**

Each division and agency will take steps to begin the implementation of a statewide records management system that meets the requirements set forth in W.Va. Code.

*Refer to objective "Records Management" in Secretary's FY2009 Planning Guidance: pages 18, 39.*

#### **RESPONSIBLE PARTIES:**

All divisions and agencies.

#### **DELIVERABLE:**

Divisions and agencies of the Department of Administration will draft and implement an agency-specific records retention policy and schedule. Retention schedules must meet all legal requirements for the various types of information stored.

The implementation of agency record retention policies and schedules is a first step as the state progresses towards the implementation of a statewide, comprehensive records management program that effectively and efficiently meets statutory requirements through the use of technology and digital databases to reduce the use of paper and physical storage space.

**W. Va. Code §5A-8 states,** *"The secretary of the department of administration is hereby designated the state records administrator. The administrator shall establish and administer... a records management program, which will apply efficient and economical management methods to the creation, utilization, maintenance and retention, preservation and disposal of state records; and shall establish and maintain a program for the selection and preservation of essential state records and shall advise and assist in the establishment of programs for the selection and preservation of essential local records."*

Currently, the executive branch lacks a comprehensive records management program in accordance with statute. To fulfill statutory requirements, the Department of Administration will implement a records management system that utilizes technology to operate most efficiently.

#### **IN SUPPORT OF GOVERNOR'S STRATEGIC PLAN ITEM III:**

*INCREASE THE ACCOUNTABILITY OF STATE GOVERNMENT AGENCIES TO ACHIEVE BETTER, MEASURABLE RESULTS.*

## **OBJECTIVE 6:**

### **FINALIZE THE DEPARTMENT'S CONTINUITY OF OPERATIONS (COOP) PLAN.**

The Department of Administration will complete the drafting and first round of testing of its COOP plan in support of the governor's Continuity of Government(COG) plan.

*Refer to objective "Business Continuity" in Secretary's FY2009 Planning Guidance: pages 11-13.*

#### **RESPONSIBLE PARTIES:**

**All divisions and agencies.**

#### **DELIVERABLE:**

The Department of Administration will be prepared to act on a tested and revised department-wide COOP plan that includes a prepared and tested disaster recovery site located in Flatwoods and is supported by agency-level COOP plans. The department and its agencies' COOP plans, in turn, support the executive branch's COG and COOP plans.

Both COG and COOP plans are tools used by all levels of government to ensure the provision of essential government actions during extraordinary circumstances. Additionally, COG and COOP plans set the terms and conditions necessary for the resumption of normal government operation. Extraordinary circumstances may be caused by man-made or natural reasons and may affect state employees, facilities, or system infrastructure. Regardless of the type or magnitude of a possible disaster, both COG and COOP plans allow for policies and procedures to be implemented to provide for employee safety and the continued delivery of services to the stakeholders of state government.

Every division and agency must have a plan that supports the department's plan and provides, at a minimum, for the following: the protection, use, and security for all systems and necessary equipment; the identification of alternate work sites that take into account the minimum amount of equipment necessary for at least one month of operations; and provisions of alternate methods of communication that include contact lists for personnel, customers, and emergency officials.

#### **IN SUPPORT OF GOVERNOR'S STRATEGIC PLAN ITEM III.D.:**

*INCREASE THE ACCOUNTABILITY OF STATE GOVERNMENT AGENCIES TO ACHIEVE BETTER, MEASURABLE RESULTS BY DRAFTING AND TESTING STATEWIDE CONTINUITY OF OPERATIONS AND CONTINUITY OF GOVERNMENT PLANS.*

## **OBJECTIVE 7:**

### **Consolidate facilities management within and better manage the fixed assets of the executive branch.**

The General Services Division and Real Estate Division will continue to consolidate all facilities management functions for buildings owned by the executive branch, and the Purchasing Division will implement a new fixed asset management system.

*Refer to objective "State-Owned Assets" in Secretary's FY2009 Planning Guidance: pages 14-15.*

#### **RESPONSIBLE PARTIES:**

**General Services Division, Real Estate Division, and Purchasing Division.**

#### **DELIVERABLES:**

The Department of Administration, through the Real Estate Division, will assume control of the Culture Center and the Diamond Building. Subsequent to the transfer of control, the Department of Administration will process any outstanding debt service payments on the buildings, and the General Services Division will provide custodial and maintenance services for the buildings. Consolidating these facilities management functions within the Department of Administration allows other executive branch agencies to then fully focus on their own core competencies.

The General Services Division, in conjunction with the other stakeholders of the Capitol campus, will prioritize the actionable recommendations of the Capitol campus master plan to improve the campus' function by creating efficiencies and modernization while staying attune to its history. Funding requests will then be made based on the prioritized recommendations and available funds.

The Purchasing Division will reconcile the state's fixed assets and implement a new fixed asset management system to provide oversight of the executive branch's fixed assets from their inception through disposition. This will provide greater oversight of equipment, furniture, fleet, buildings, and real estate through a more transparent process.

#### **IN SUPPORT OF GOVERNOR'S STRATEGIC PLAN ITEM III:**

*INCREASE THE ACCOUNTABILITY OF STATE GOVERNMENT AGENCIES TO ACHIEVE BETTER, MEASURABLE RESULTS.*

### SECRETARY'S INTENT LETTER

As I often say, the two indicators of successful leadership are: (1) accomplishment of the mission, and (2) taking care of your people. The first requires technical competencies, and the second requires concerned leadership. Both are equally important. As the leaders of the department's divisions and agencies, I expect you to create the environment for your employees to be successful. This letter reflects my intent on how to accomplish that mission.

#### MISSION.

I expect you to know and understand both your mission and the department's mission and to be organized to accomplish both. While on the surface this may sound obvious, I think in some cases our structure does not serve us well. Specifically, I want you to review your organization to ensure that it is lean and best reflects what is needed to get the job done. If we have unnecessary redundancies, they need to be eliminated. The people in the unneeded positions should be realigned to fill in where needed. The vast resources in the Division of Personnel will help with any employee realignments (*Taking care of your people*).

#### ETHICS.

Know the letter of the law and lead your organization in such a manner that each employee knows, through your own personal example, the spirit and the intent of the law. Remember that as leaders we are all "living in a fish bowl" and every action we take will be analyzed by our subordinates, the taxpayers, and the media. Your own personal example sets the tone for your employees. Ask yourself the hard questions:

1. Is the playing field level for promotions for all my employees?
2. Is the playing field level for hiring temporaries?
3. Are the work hours the same for everyone in my organization?
4. Is the leave system the same for everyone?
5. Is the policy on moonlighting enforced?
6. Are the civil service system regulations followed without compromise? I want you to pay particular attention to the hiring system. All ten applicants on the civil service register must receive fair treatment, and all postings must be made known to your current employees.

#### DIGNITY and RESPECT.

I expect every employee to be treated with dignity and respect. Regardless of position or salary, each employee should be held in the highest esteem. To foster this, I want you to be visible to your employees and take time to get to know each of them. Frequent "all hand" events as well as round table meetings with your managers are the best way to ensure your expectations are met.

## LEADERSHIP.

I suggest you read Rules & Tools for Leaders by Perry M. Smith (provided by me). Each of you has developed your own leadership style. As always, I have special trust and confidence in your leadership ability and respect the style you employ in your organization. However, this book covers the commonly accepted and time-tested principles of effective leadership and management. I have provided it to you as an extra resource for your use and for further discussion.

Good leadership demands the highest standards of personal responsibility and accountability. I hold you, as a leader, responsible for everything that happens or fails to happen in your organization. While this may seem like a daunting burden, if you have developed your team and established workable standard operating procedures, then constraints and system problems should be minimal. To this end, at a minimum, I expect you to:

1. **See and be seen.** This involves leadership by walking around. Depending on the size of your division/agency, schedule time each week to simply walk around and spend quality time with your employees. The mail clerks to the CFO, each deserve some of your undivided attention.
2. **Inspect what you expect.** This involves personally reviewing all aspects of your organization that affect mission accomplishment.
3. **Lead from a position where you can best control the action.** Sometimes that means you are out in front of an issue as a visible example to your employees; and, sometimes that means sitting in the back to allow your employees the opportunity to grow professionally.

What makes a good leader? While we all may have different answers to this question, I want you to consider the following as you lead your organization and mentor your employees. A good leader:

1. Keeps cool under pressure.
2. Clearly explains missions, standards, and priorities.
3. Sees the big picture; provides context and perspective.
4. Makes tough, sound decisions on time.
5. Adapts quickly to new situations; can handle bad news.
6. Gives useful feedback; sets a high ethical tone.
7. Is positive, encouraging, and realistically optimistic.

## MISTAKES.

Things happen. Mistakes are great learning tools. Accountability for mistakes is situation dependent and should always include mitigating and extenuating circumstances. Procedural errors require disciplining the system. Personal errors require retraining of the affected employee. Integrity violations are not mistakes and will never be tolerated. Bad news

never gets better with age. Let me know when a mistake takes us outside the law or has the potential to either cost the state financially or is press worthy.

### **DECISION-MAKING.**

Trust your instincts. Use your staff. Delegate when you can. Be careful not to analyze an issue into inaction; go with your instinct or the 70% solution. Make all decisions with courage; do the right thing, in the right way, for the right reason. The foundation of all decisions should be based on what is in the best interest of the taxpayers.

### **COMMUNICATIONS.**

We speak with one voice. As a director, I have special trust and confidence in your knowledge, skill, ability, and integrity and expect you to discuss openly with me if you believe that a course of action I am pursuing is not in the best interest of your agency/division. Speaking truth to power requires courage; I need to hear your views on the tough issues. Other communication requirements are the following:

1. The weekly directors' meeting is mandatory. If you cannot attend, then get with me ahead of time to discuss.
2. All legislative contacts should be back briefed to the legislative coordinator.
3. I have an open door policy for you at anytime. No appointment is necessary; simply check with my secretary to ensure that I am in the office.
4. Keep me in the loop as to your work schedule. Call me regarding vacation time, sick leave, and any extraordinary circumstances that require you to be off. No micromanagement intended here; as the secretary, I need to know how and where to get hold of you.

### **MANAGEMENT.**

In addition to the procedures and practices unique to your organization, I expect you to be thoroughly familiar with or accomplish the following:

1. Civil service system.
2. Grievance process.
3. P-card and purchasing rules. (Personally inspect the p-card bill monthly).
4. Annual performance evaluations.
5. Standard operating procedures and employees' desktop procedures.
6. Leave system.
7. Profit & loss statements, comparative expense analysis, and an overtime report.
8. Budget development and execution.
9. Annual report and goals and objectives.
10. Training plan.

## CUSTOMER SERVICE.

This is the most important thing we do; this is our mission. High-quality customer service is the goal of the department. The service we provide directly affects the performance of all other agencies in the executive branch. While our customers currently do not have the option to “shop us” with the private sector, their experience with us should match the expectations provided in the private sector. I want each of your divisions/agencies to focus on three core elements: exposure, rapport, and performance.

1. **Exposure.** Your agency cannot provide its services unless we first effectively communicate, advertise, and sell your product to our customers. Customers need to know who we are, what we do, and how we do it. Requesting our service must be easy – they should not have to jump through hoops to get action. As the leader of your organization, meet with potential and current customers face-to-face. Exposure is selling your service to them. Make it attractive, convenient, and fun.
2. **Rapport.** Do your customers know you personally? Do you provide them timely feedback on their issues? Do you give them courtesy follow-up calls to get feedback on your division/agency’s performance? Do you have service-level agreements to guarantee your service? Rapport is about caring for your customers. To that end, we need to lead our people so that they have a natural, intrinsic desire to excel and help our customers. Rapport sets the stage for performance.
3. **Performance.** Great performance comes after we have mastered the exposure and rapport elements. The foundation of great performance is “knowing your stuff – cold.” We must be the subject matter experts of our trade. Great performance also requires great administrative acumen. Record-keeping, continual auditing of the process, and accountability to the taxpayers are requirements. What we do must be transparent to the taxpayers. Performance is meeting the expectations of our customers – government agencies – so that they, in turn, can meet the expectations of their customers – the taxpayers.

Finally and most importantly, have fun. For most of us, this is a once in a lifetime opportunity. This is the time and the place to be creative. Together we can accomplish great things for the people of West Virginia.

**Montani Semper Liberi,**



Robert W. Ferguson Jr.  
Cabinet Secretary