Agency Planning, Budget, Performance, and Workforce Alignment Timeline

This document aligns the Annual Staffing Plan (ASP), Agency Strategic Plan, Agency Performance Plan (APP), Agency Budget, and the President's Management Agenda (PMA) from a process perspective, with attention to fiscal-year timing, quarterly workforce update cadence, and the Chief Human Capital Officer (CHCO) governance implications raised under 5 U.S.C. 1401 and 1402.

Alignment Framework

The federal budget process runs through formulation, congressional, and execution phases. The Office of Management and Budget (OMB) issues spring planning guidance, Circular A-11 in June, agency budget submissions in September, fall review and passback in late-November, and the President's Budget transmitted on the first Monday in February. Because budget cycles overlap, agencies must begin the next cycle before the previous cycle is complete, which is why the budget, APP, staffing planning, and strategic planning documents require a synchronized annual rhythm rather than stand-alone deadlines.

The PMA provides government-wide management direction. The Agency Strategic Plan translates that direction into agency objectives. The APP operationalizes the Agency’s Strategic Plan into annual performance goals and measures. The Agency Budget resources the agency’s program activities and priorities, and the ASP converts mission and budget decisions into funded positions, skills, hiring, succession, and workforce actions. Under 5 U.S.C. 1402, the CHCO is responsible for setting workforce strategy, assessing future workforce needs based on the mission and strategic plan, and aligning HR policies with mission, strategic goals, and performance outcomes.

Fiscal Year Timeline

The timeline is organized on a fiscal-year basis, beginning in October and running through September. The fiscal year starts on October 1, when OMB's execution phase begins with apportionment and agency use of funds. Accordingly, the ASP appears at the start of the timeline as a current-year execution and accountability document, while the budget process has both current-year execution and next-cycle formulation running in parallel.

Process Sequence

Document	Primary process role	Main upstream inputs	Main downstream outputs
President's Management Agenda	Sets the Administration’s government-wide management reform priorities and initiatives.	White House and OMB management priorities.	Agency strategy, performance, and management alignment and emphasis.
Agency Strategic Plan	Multi-year plan established at the start of an Administration articulating agency’s mission, strategic goals and objectives, and outcomes to be achieved over course of the Administration.	Statutory mission, leadership priorities, PMA direction.	Informs APP goals, workforce needs, and resource priorities.
Agency Performance Plan	Converts strategy into two-year performance goals, indicators, and targets—updated annually.	Strategic Plan, data-driven performance reviews, budget context.	Alignment with budget justification, staffing requirements, and accountability or performance reporting of progress.
Agency Budget	Translates priorities into requested and enacted resources through formulation, passback, congressional action, and execution.	OMB guidance, APP evidence, strategic priorities, workforce requirements.	Constrains and enables funded full-time equivalents (FTE), hiring, contracts, and operating execution.
Annual Staffing Plan	Converts mission, budget, attrition, and capability needs into hiring and workforce execution decisions.	Strategic Plan, APP, enacted or anticipated budget, workforce data.	Quarterly reporting, hiring actions, succession actions, and component accountability.

Timing (FY order)	October (FY start)	October - November	Late November - December	January	First Monday in February	February - April	Spring - Summer	June - July 15	September
Agency budget	Fiscal year starts; OMB apportions funds, and agencies begin execution.	OMB fall review analyzes agency proposals for the next budget cycle.	OMB passback and agency appeals occur.	Agencies prepare congressional budget justifications.	President transmits the budget to Congress.	Congress reviews the President's Budget, Congressional Budget Office re-estimates, and committees submit views and estimates.	OMB sends spring planning guidance, and agencies discuss next budget issues and options. OMB issues Circular A-11 during the summer providing guidance on next Budget cycle.	**July 15**: Mid-Session Review updates estimates to Congress by law.	Agencies submit budget materials to OMB; Congress is supposed to complete appropriations action by September 30 or provide a continuing resolution.
PMA	PMA implementation continues across agencies.	PMA priorities can influence management and budget emphasis.	PMA remains a government-wide influence.	There is no action required at this time.	PMA messaging can be reflected in management justifications.	There is no action required at this time.	PMA and management priorities in spring planning guidance shape management reform expectations for agency documents.	There is no action required at this time.	There is no action required at this time.
Strategic Plan	Strategic priorities continue to guide program and service delivery, execution and reviews.	Strategy informs budget and performance tradeoffs.	Strategic priorities remain the anchor for tradeoff decisions.	There is no action required at this time.	Strategic Plan remains the multi-year frame. Strategy supports narrative justification.	Strategic priorities frame testimony and issue resolution.	Strategic reviews assess performance, diagnose problems and opportunities, and identify adjustments needed to improve performance.	There is no action required at this time.	There is no action required at this time.
APP	APP execution begins for the fiscal year.	Performance targets and evidence help frame review of budget submission.	Performance targets and priorities may be adjusted to align with passback decisions.	APP final coordination aligned with budget materials.	APP published and transmitted to the Congress concurrently with the President's Budget.	Agencies monitor current-year performance while defending next-year requests.	Agencies use performance evidence base from data-driven performance reviews to inform next-cycle planning.	There is no action required at this time.	APP drafting with proposed performance goals or targets aligned to budget submission.
ASP	**ASP begins current-year execution**; align funded hiring, skills, and workforce actions to available resources.	Workforce gaps and FTE needs should feed next-cycle budget arguments.	ASP assumptions should be revised as funding levels and hiring ceilings become clearer.	ASP refresh should connect funded positions to budget justification and hiring needs.	ASP should be updated to reflect the submitted budget posture for the next cycle.	ASP quarterly update cadence should capture hiring execution and risks during congressional uncertainty.	ASP quarterly updates should inform workforce needs, restructuring, and skills gaps for the next submission.	**June**: ASP data should inform workforce assumptions in the budget build. **July 15**: ASP quarterly review should capture workforce execution against revised assumptions.	Year-end ASP update should close the loop on hiring execution and set the next fiscal year baseline.

Quarterly Cadence

The ASP is structured as a standing quarterly review and reporting cycle across the fiscal year rather than a one-time document, because the CHCO's statutory role requires ongoing visibility into workforce needs, records, and operational information. A practical cadence is Q1 in December, Q2 in March, Q3 in June, and Q4 in September. Each quarterly update should address funded hiring status, attrition, critical skill gaps, succession risks, and any budget or performance changes that require workforce adjustment.

Quarter	Suggested ASP Review Focus	Key Participants
Q1 (Dec)	Validate funded staffing baseline, early hiring execution, component variances, and governance issues.	Headquarters (HQ) CHCO, component CHCOs or HR leads, Chief Financial Officer (CFO), performance office.
Q2 (Mar)	Reconcile workforce execution to budget defense and congressional developments.	HQ CHCO, CFO, budget office, strategic or performance office.
Q3 (Jun)	Update skills and hiring assumptions to support A-11 and next-cycle formulation.	HQ CHCO, CFO, hiring leads, component HR leaders.
Q4 (Sep)	Close out annual execution, document variances, and establish next-year baseline on the eve of the new fiscal year.	HQ CHCO, component CHCOs, CFO, performance office, agency leadership.

Governance Implications

This governance structure is consistent with 5 U.S.C. 1401 and 1402, which designate the CHCO as a primary-duty official responsible for agency workforce strategy and grant the CHCO access to agency records and information needed to carry out those duties. That statutory framework supports an agency design in which component CHCOs or equivalent workforce leaders have a direct reporting relationship, or at minimum a clearly enforceable oversight line, to the headquarters CHCO so that workforce data, controls, and decisions can be integrated across components.

In practice, this means the headquarters CHCO should own enterprise ASP policy, quarterly review standards, workforce data definitions, and cross-component escalation, while components supply mission-specific demand signals, hiring plans, and execution updates on a recurring cadence. This accountability structure enables structured interactions among the headquarters CHCO, component HR Directors and Leaders, Chief Financial Officers, strategic planning staff, performance staff, and leadership review forums—with clear handoffs among strategy, performance, budget, and workforce planning.