

# **BFEM Performance Management:**

Generating Performance Reporting for the PAR

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## **BFEM Application**

- The BFEM Application is owned and operated by the federal government (GOTS: Government off-the-shelf).
- Developed using open source code, BFEM has no annual user licenses.
- BFEM offers a shared production and test environments with logical separation of data, so fixed costs for the application are split among the entire customer base.
- Any customer enhancement requests are designed generically so all customers may benefit from any enhancement.





## BFEM Capabilities



#### Customers use the **Budget Formulation** capabilities to:

- Collect and aggregate financial and human resource allocations/requests and their justifications to support formulation of an agency's budget,
- Create budget sets that maintain distinct phases of the budget process with full audit trails and track changes on the budget, and
- Generate analytical reports and budget documents such as the OMB Submission, Congressional Justifications, Budget Summary, and MAX A-11.



#### Customers use the **Performance Management** capabilities to:

- Define measures, goals, and milestones, and support distributed data calls for collection of all defined measures.
- Control reporting periods, provide exception reporting, and compare metrics to forecasts and actual performance,
- Support inclusion of measures into budget formulation documents, and
- Generate the Annual Performance Plan (APP), Annual Performance Report (APR), or the Performance section of the annual Congressional Budget Submission.



#### Customers use the **<u>Strategic Planning and Programming</u>** capabilities to:

- Create a baseline budget by applying inflation factors at any level, and to analyze and adjust the baseline,
- Develop and perform analysis of strategic initiatives or options, capturing the narrative description, cost analysis, and performance analysis of an option in a single system,
- Build scenarios by approving or disapproving specific options to see the impact of decisions on the budget,
   and
- Produce strategic planning documents with dynamic tables linked to both performance and budget data.







## Performance Competencies

#### Data Collection

Agency-controlled configuration of data collection and data calls with a streamlined data entry interface for end user.

### Document and Report Production

Analytical and document reports in Excel, Word, and XML. Can generate the full APP&R or the Performance section of the PAR.

### GPRA Modernization Act Support

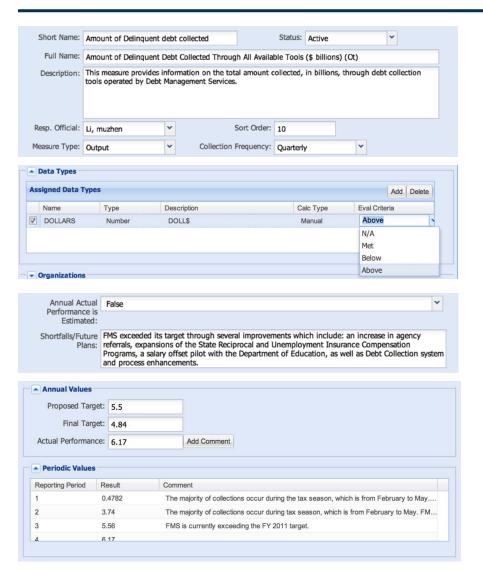
- BFEM Data model supports Goals hierarchy, Measures and Milestones;
- Integration with Budget Formulation for Performance Budgeting;
- Machine-readable exports for Performance.gov submissions







### Performance Measures



- Performance metric
- Can be lined to strategic goals and/or budget
- Custom fields for definition and tracking progress
  - Quantitative and qualitative fields
  - Target and actual result

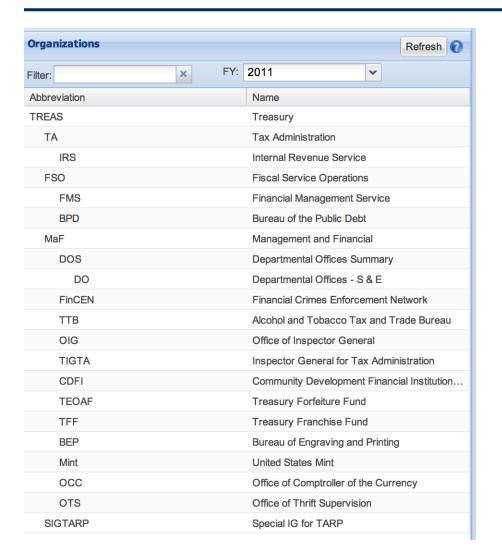
    Definition for meeting target (>, <, =)
  - Annual and periodic data collection
  - Any number or configuration of fields allowed to meet agency needs.







# Organizations



- Data for measures is assigned and collected in the context of a specific organization
- Organization assignments to users control access to data
- Organizations can be organized hierarchically
- Allows for linking performance to Budget Formulation and Strategic Planning







# Goals (Strategic Plan)

Name	Status	Туре	Frequency
<b>▷</b> 💋 1	ACTIVE	Strategic Goal	
<b>▷</b> 💋 2	ACTIVE	Strategic Goal	
<b>⊿</b> 💋 3	ACTIVE	Strategic Goal	
<b>▷</b> 💋 3	ACTIVE	Strategic Goal	Annual
▷ 💋 3.1	ACTIVE	Outcome	
	ACTIVE	Outcome	
▷ 💋 3.2	ACTIVE	Outcome	Annual
▷ 💋 3.2.1	ACTIVE	Objective	
▷ 💋 3.2.2	ACTIVE	Objective	
	ACTIVE	Objective	
▷ 📁 3.2.3	ACTIVE	Objective	Annual
<b>4</b> 🧖 3.2.3.1	ACTIVE	Multi-year Perform	
▶ 💋 3.2.3.1	ACTIVE	Multi-year Perform	Quarterly
■	ACTIVE	Annual Performanc	Quarterly
2014 (277J) Cro	s ACTIVE		
2013 (277J) Cro	s ACTIVE		
2012 (277J) Cro	s ACTIVE		
2011 (277J) Cro	s ACTIVE		
▷ 💋 3.2.4	ACTIVE	Objective	
▶ 💋 3.2.5	ACTIVE	Objective	
	ACTIVE	Outcome	
-			

Goals can be used to group measures together

- Goals can be arranged hierarchically
  - Example: strategic plan







# Configuration Options

#### Custom Fields

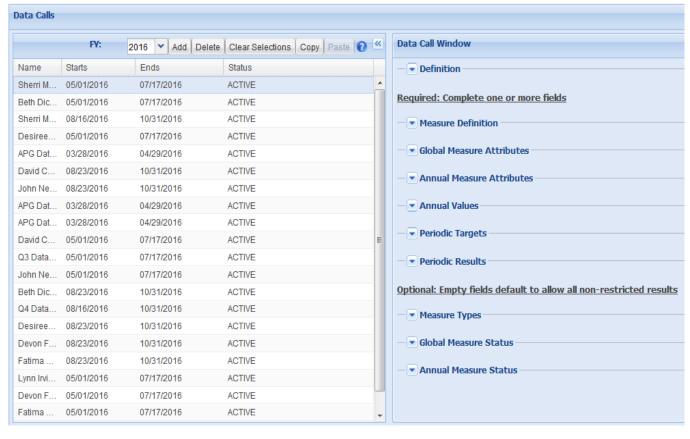
- Attributes
  - Available for goals and measures
  - Allow global or annual data collection
- Data Collection Types
  - Allow periodic or annual data collection for measures
- Data types
  - Number
  - Text
  - Date
  - File
  - Select List

### Reporting Periods and Data Entry Windows

- Define any number of reporting periods per year
- Lock edits for certain fields
  - Example: periodic result for Q3 is only editable during for two weeks after Q3 ends







- Pre-filter
   performance
   measures based
   on a wide range
   of measure
   criteria
- Provide user and role specific measure views
- Define data entry periods
- Define ability to edit measure fields







#### Word Reports

Real-time production-quality output - typically to produce PAR or APP&R

IEASURE: Amount of Delinquent Debt Collected Per \$1 Spent (E)								
	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013
Target	36.4	36.5	40	43	43	43	45	48
Actual	39.97	53.55	54.76	53.76	54.54	51.65*		
Target Met?	Υ	Υ	Υ	Υ	Υ	Υ		

#### Excel Reports

Displays data from the database in a familiar, user-friendly format; Report templates can include graphic charts based on the report output

#### XML Reports

Allow export of PMM data in XML format (Can generate Machine-Readable Report for GPRA Act of 2010)







# Document Generation Examples

 BFEM Document Engine allows it to generate any document that can be produced and formatted in Microsoft Word.

Example of a PMM table used for Treasury's BIB:

#### Performance by Budget Activity

#### Dollars in Thousands

Budget Activity	Performance Measures	FY 2014 Actual	FY 2015 Actual	FY 2016 Actual	FY 2017 Target	FY 2018 Target	Trend
Audit	Number of Completed Audit Products	75.0	86.0	98.0	86.0	86.0	<u> </u>
Audit	Percent of Statutory Audits Completed by the Required Date	100.0	100.0	100.0	100.0	100.0	
Investigations	Percentage (%) of All Cases Closed During Fiscal Year that were Referred for Criminal/Civil Prosecution or Treasury Administrative Action	84.0	87.0	84.0	80.0	80.0	~_







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PMM table used by Department of Energy:

Measures for Annual Performance Report

#### Federal Salaries & Expenses

NNSA Federal Salaries & Expenses

Program	NNSA Federal Salaries & Expenses							
Performance Goal (Measure)	Federal Administrative Costs - Maintain the Office of the Administrator Federal administrative costs as a percentage of total Weapons Activities and Defense Nuclear Nonproliferation program costs at less than 6%.							
Fiscal Year	2014	2015	2016	2017	2018	2019	2020	
Target	5.9 %	5.9 %	5.9 %	5.9 %		N/A	N/A	
Result	Exceeded - 4.1	Met - 3.9	Met - 3.9			TBD	TBD	
Endpoint Target	In keeping with OMB and DOE expectations that administrative costs be minimized, maintain the Office of the Administrator Federal administrative costs as a percentage of total Weapons Activities and Defense Nuclear Nonproliferation program costs at less than 6%.							
Commentary on 2018 Results (Action Plan if Not Met)								
Documentation, Limitations, Methodology, Validation, and Verification								



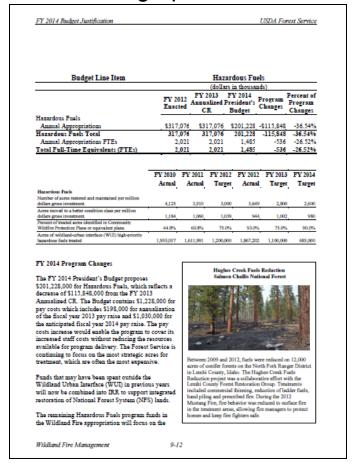




## Document Generation Examples

Other examples of Word Documents with tables and graphics :









### **Contact Information**



Please contact ARC Franchise Services for a BFEM federal shared service inquiry.

#### **ARC Franchise Services**

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