



2008 FALL SYMPOSIUM

Navigating Transition, Leading Change

SESSION SUMMARY

The New Budget Office: How Collaboration Tools Can Improve the Lives of Budget Staff

Heather Sumpter, Reporter

Budgeting is a dynamic process focused on what's happening today; therefore budgeteers and budget systems must be equally dynamic. These were the sentiments of **Andy Schoenbach**, the Budget Formulation and Execution Line of Business (BFELoB) Policy Lead and Budget Systems Chief, as he opened the morning session, *The New Budget Office by BFELoB*. Introducing the BFELoB, Andy outlined its core principles:

- Improve the Federal budget without compromising essential budgeting functions,
- Base the BFELoB in voluntary value propositions,
- Make implementing BFELoB tools and services optional within agencies, and
- Allow participating agencies to govern the system.

Thus far the BFELoB has produced significant results through the establishment of a project management office, a government-wide

wiki site, and secure online meeting capabilities for interagency interaction.

Next, **Jeff Schwartz** from the EPA's Office of Budget explained the development of the BFELoB decision matrix, a consumer report checklist for budgeting systems. In 2007, the working group compiled 500 functional requirements from a variety of agencies for the development of the decision matrix. The requirements were used as a measurement against which to assess available systems, resulting in the development of the four-tiered BFELoB Formulation & Execution Scenario Document. Since the beginning of 2008, the document has been consolidated and now includes fifty requirements in fifteen scenarios.

In reviewing the decision matrix, the BFELoB requested information from two private-sector companies, six federal agencies, and three private vendors. The workgroup provided

the scenario document to agencies, and the agencies then identified necessary benchmarks. In their assessment, workgroup members individually scored the decision matrix and came to consensus on the overall scores and comments returned.

As the next step, the BFELoB steering committee will decide on the need for and direction of expanding the decision matrix.

Emily Fort from the Office of Management and Budget's Budget Systems Branch spoke next about the Max Federal Community, a government-wide collaborative wiki site, and its communication capabilities.

Currently, the community has over ninety-two hundred users across the government. The Max Community was developed to address the inefficiencies of e-mail, in preparation for the upcoming turnover of federal workers. Current methods of information sharing through e-

mail and group drives are confusing for new employees and are difficult for large groups to access. The Max Community provides a space for knowledge management, benefiting federal employees and ensuring the future transfer of information by encouraging daily use of its tools.

The community reduces costs by providing a single storage technology for finding and sharing information. Although some pages are inter-departmental, each agency can also have its own space with restriction options to make information secure, yet accessible.

The community allows for the automatic and simultaneous reorganization of information; direct edit options allow users to store multiple document versions, provide explanatory comments, or add comment threads. Site members have the options to communicate on pages, receive automatic notification of updates, or schedule online

meetings. Online meetings enable members to participate without the investment in travel time and meeting hosts can present materials to the meeting space as they are discussed in real time.

The final panelist, the BFELoB Deputy Policy Lead **Phil Wenger**, shared some of the projects from the BF-ELOB Data Collection & Tracking work group. Activities include:

- Embracing a flexible and collaborative approach identify agency needs,
- Using pilot exercises to learn and develop site tools,
- Examining how to share the site with government agencies without programmers, and
- Resolving challenges such as site formatting, document cohesion, and distribution

The session concluded with a questions and answer session about future site updates, further benefits, the affects of the transition.

Q: How can people be convinced to use the e-briefing function when they can't see the edits?

A: The site is moving closer to having the option to view multiple edits one a single document. Currently, document versions can be compared in any Max Community application.

Q: How is the Max Community wiki site different from a storage drive?

A: It's more flexible and acts as a repository of information, thus promoting inter-agency collaboration. The site is also easier to search, manage and makes it easier to include individual edits.

Q: Are the investments being made in the site put in jeopardy by the transition?

A: The risk appears to be minimal and BFELB does not expect drastic changes to its mission with the new administration.