CivicActions &

The performance.gov discovery process and findings

Findings, insights, and key takeaways to help inform how we might modernize the federal quarterly performance reporting process

Where we started

Performance.gov Product Vision

Make it easier for people to use official information about the U.S. government's goals and results to succeed at tasks that accelerate the Nation's progress.

Performance.gov Problem Statements

- It’s too hard to align people around the same goals, both inside and outside of government.
- It’s too hard for teams responsible for U.S. strategy execution to put out information about their goals, progress, and performance metrics in a way that engages the right communities who could help them succeed.
- In turn, it’s too hard for the communities that want to contribute to understand the state of progress and how they can help.
- Because these tasks are too hard, the Federal government misses key opportunities to apply collective, cohesive action to the Nation’s challenges, making it harder deliver results for the American people.

Scope of Work

GSA seeks agile digital product development services:

- Includes all aspects of digital product development (including planning, design, software development / coding, prototyping, documentation, and testing.)
- The services also includes support of GSA security documentation and testing.

Key terms to know

Government Performance and Results Act Modernization Act

- GPRA or GPRAMA
- Enacted in 2010, this act provides the foundation by which Federal agencies are held accountable for establishing management processes and setting performance goals and objectives that deliver results for the American taxpayer.

Agency priority goals

- APG
- Goals set by the federal agency heads that reflect the top near-term, implementation-focused priorities to be achieved over the next two years.

Cross-agency priority goals

- CAP goals
- Presidential priorities which are long-term in nature that require interagency coordination to overcome pressing management challenges.

Office of Management and Budget

- OMB
- OMB's mission is to assist the President in meeting policy, budget, management, and regulatory objectives and to fulfill the agency's statutory responsibilities.

Visit performance.gov/about to learn more about federal performance management.

The PMLOB Charter

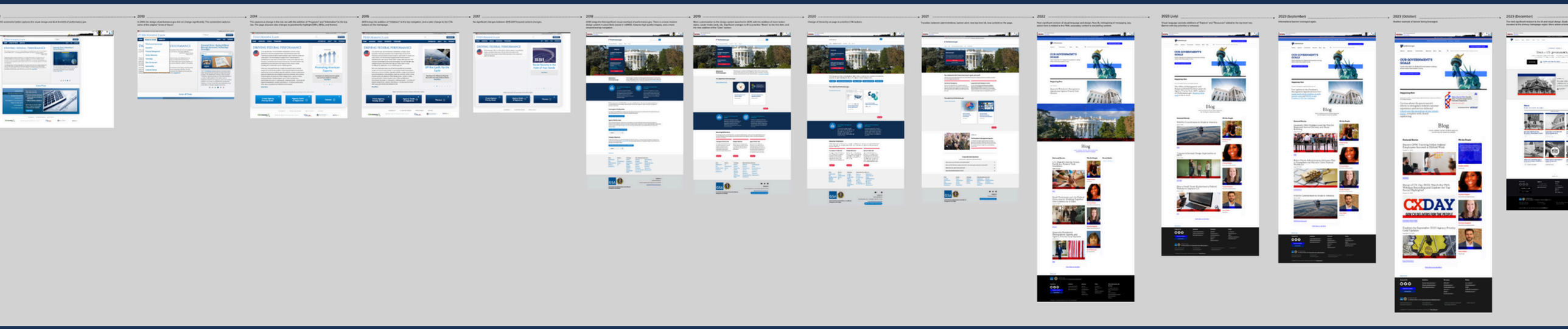
aka the **performance management line of business charter** aka why we are here and what we need to do

- Develop Performance.gov into a GPRAMA-compliant data tool. This includes providing flexible solutions to meet GPRAMA machine-readability and Federal Program Inventory requirements by **leveraging an incremental, phased approach**.
- Develop **flexible and balanced approaches** to provide OMB, Congress, and others a cohesive view of federal performance, while allowing individual agencies to provide specific performance information and perspective facilitating stakeholder understanding in a cost-effective manner.
- Examine opportunities to leverage Performance.gov to streamline Agency reporting to OMB, OMB/Congressional reviews, and **maximize workload efficiency and minimize burden**.
- Evaluate options to leverage Performance.gov as a tool to **promote collaboration and knowledge sharing** may include unique agency data) across the federal performance community.
- Provide a **government-wide capacity** that complements agency performance management activities and systems in a **cost-effective manner**.

Discovery

Exploratory research inputs

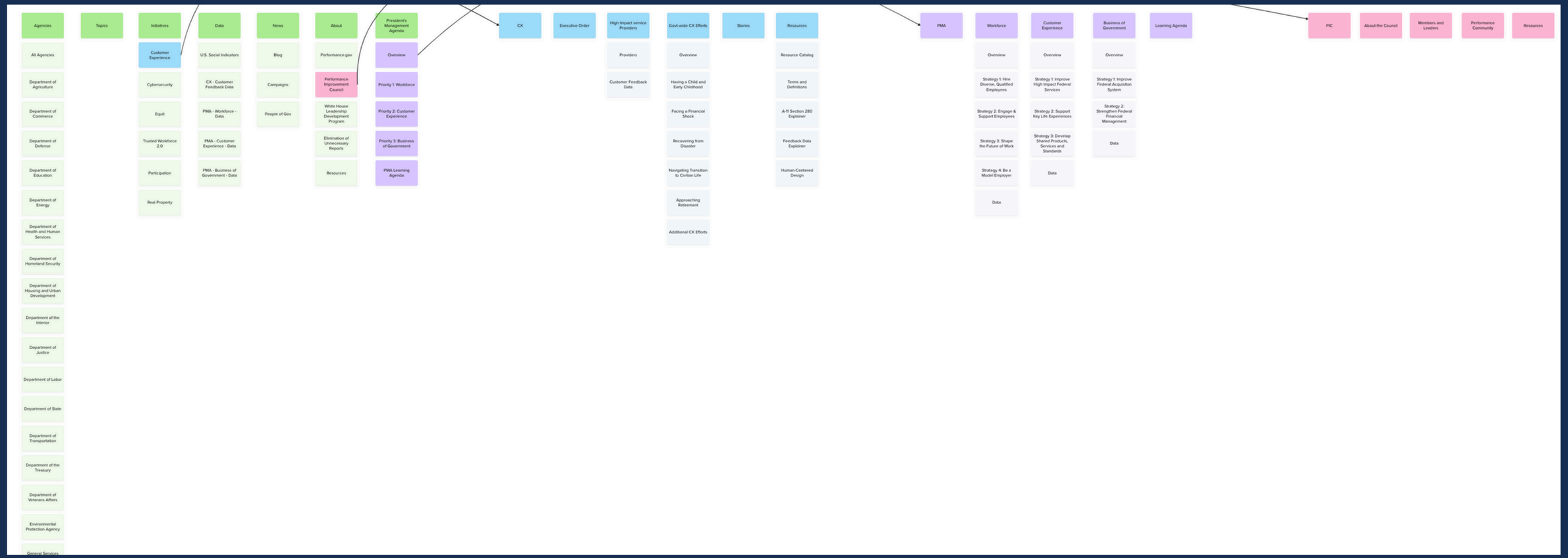
Homepage evolution over time



CivicActions &

Exploratory research inputs

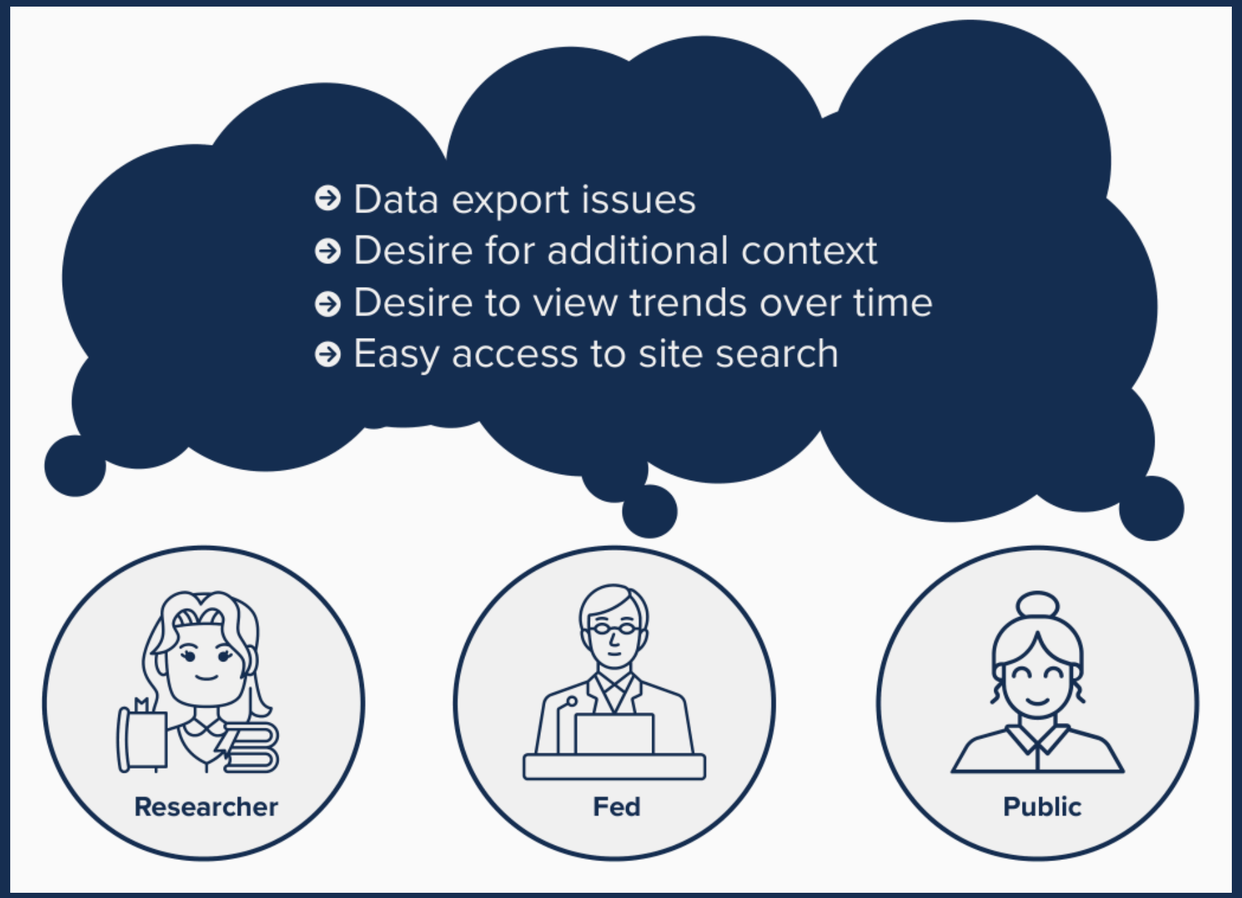
Current state main navigation audit



CivicActions &

Exploratory research inputs

Analyzed Touchpoints feedback



Reviewed 83 submissions, extracted ~24 relevant inputs for further analysis. These submissions came primarily from the /cx/ section of performance.gov from May 2021 - February 2024.

Four key themes emerged from three key audiences.

CivicActions &

Exploratory research inputs

Content crawls and audits (March + June)

About this sheet: This contains indexable pages for performance.gov. Crawl date: June 6, 2024.

Address	Title 1	Title 1 Length	Meta Description	Meta Description 1 Length	Meta Keywords	H1-1	H1-1 Length	H1-2	H1-2 Length	H2-1
The URL address.	*The first page title discovered on the page. Page titles appear on search engine results pages (SERPs).*	*Character count of page title. Recommended length is 50-60 characters before it may be truncated.*	*Page's meta description. Learn more about meta description best practices.*	*Character count of meta description. Recommended length is 50-160 characters optimized for search snippets.*		*First H1 on page; can be the same copy as the page title.*	*Character count of H1. 60 characters is recommended for readability, but no formal limit.*	*Copy if there is a second H1 on the page. It is best practice to only have on H1 on a page.*	*Length of second h1*	*First H2 heading on a*
https://www.performance.gov/	Track the U.S. government's goals | Performance.gov	51	U.S. strategy execution	83		Track the U.S. government's goals	33		0	Featured
https://www.performance.gov/about/	Get Started | Performance.gov	29		0		Get Started	11		0	What You Can Do Performance.gov
https://www.performance.gov/about/faq/	Frequently Asked Questions | Performance.gov	44		0		Frequently Asked Questions	26		0	When is performa on this website up
https://www.performance.gov/about/performance-framework/	Performance Framework | Performance.gov	39		0		Performance Framework	21		0	Overview
https://www.performance.gov/about/what-is-performance/	About Performance.gov | Performance.gov	39		0		About Performance.gov	21		0	
https://www.performance.gov/agencies/	Agencies | Performance.gov	26		0			0		0	Agencies
https://www.performance.gov/agencies/dhs/	Department of Homeland Security | Performance.gov	49		0		Department of Homeland Security	31		0	This agency's goa and results
https://www.performance.gov/agencies/dhs/apg/fy-22-23/	FY22-23 Archived Priority Goals | Department of Homeland Security | Performance.gov	83		0		Strengthen Federal Cybersecurity	32		0	
https://www.performance.gov/agencies/dhs/apg/fy-24-25/	FY24-25 Priority Goals | Department of Homeland Security | Performance.gov	74		0		Combat Human Trafficking, Labor Exploitation, and Child Exploitation	68	Remove Barriers to Disaster Resilience and Recovery	51	
https://www.performance.gov/agencies/dhs/apg/fy-24-25/goal-1/	Combat Human Trafficking, Labor Exploitation, and Child Exploitation | Performance.gov	86		0		Combat Human Trafficking, Labor Exploitation, and Child Exploitation	68		0	
https://www.performance.gov/agencies/dhs/apg/fy-24-25/goal-2/	Remove Barriers to Disaster Resilience and Recovery | Performance.gov	69		0		Remove Barriers to Disaster Resilience and Recovery	51		0	
https://www.performance.gov/agencies/dhs/apg/fy-24-25/goal-3/	Advance Customer Experience (CX) | Performance.gov	50		0		Advance Customer Experience (CX)	32		0	
https://www.performance.gov/agencies/dhs/service-providers/dhs-cbp/	dhs-cbp | Performance.gov	25		0		Customs and Border Protection	29		0	Designated Servi

CivicActions &

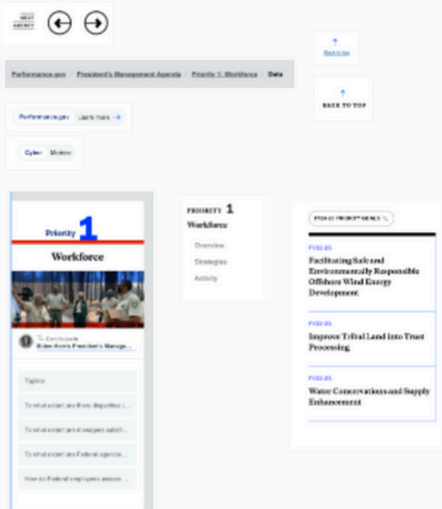
Exploratory research inputs

Visual identity audit

Cards, teasers, modals, etc.

Links & Buttons

Page navigation and way finding



CivicActions &

Exploratory research inputs

Current template audit

SBA - current ppt template

Agency Priority Goal | Action Plan | FY 23 – Q3

Increasing Capital to Underserved Small Businesses through Community Financial Institutions

Goal Leaders:

Office of Capital Access:
Bailey DeVries
Acting Associate Administrator

John Miller
Deputy Associate Administrator

Goal Overview

Goal Statement

Community Financial Institutions (CFIs) – Community Development Financial Institutions, Minority Depository Institutions, Certified Development Companies, and Microloan Intermediaries – excel at reaching underserved small businesses, including minority-, women-, and veteran-owned entrepreneurs, in need of capital. To increase access to capital in underserved markets, by September 30, 2023, the SBA will expand the number of CFIs enrolled in Lender Match by 20%.

Problem to Be Solved

Capital accessibility gaps persist among small business owners with an annual revenue of less than $100,000, sole proprietors, small business owners seeking loans of less than $150,000, and especially loans under $10,000, and low-profit industries such as childcare.

This gap contributes to racial inequities, as small business in these categories are more likely to be minority-owned. Additionally, CFIs may lack the resources to invest in marketing infrastructure to attract more borrowers. Thus, borrowers may lack awareness of CFIs, and CFIs distribute less capital to those most in need. Increasing connections between underserved small business owners and small lenders will help remove barriers that prevent underserved small business communities from accessing SBA programs and capital needed for start-up, growth, and expansion.

What Success Looks Like

- Lender Match, as a fee-free connection platform, will be an accessible marketplace for CFIs and underserved borrowers.
- SBA will help close the capital gap by better connecting borrowers with mission-based CFI lenders.
- Increased support for CFIs enrolling in Lender Match will reduce costs for those lenders, allowing them to focus resources on activities that increase lending to meet underserved small business needs.

Goal target(s)

Tracking the goal

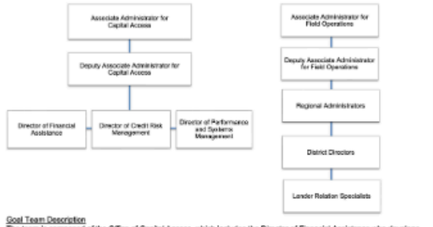
In the table below, please repeat the key metrics included in the goal statement (previous slide) that will be used to track progress.

Please update this column each quarter.

Achievement statement		Key indicator(s)	Quantify progress			Frequency
Repeat the achievement statement from the goal statement on the previous slide		A "key performance indicator" measures progress toward a goal target	These values enable us to calculate % complete for any type of target			When is there new data?
By...	We will...	Name of indicator	Target value	Starting value*	Current value**	Update cycle
06/30/23	Expand the number of CFIs enrolled in Lender Match	Number of CFIs enrolled in Lender Match	240	200	254	Quarterly

* Starting Value = As of October 1, 2021
** Current Value = As of June 30, 2023

Goal Team



Goal Team Description

The team is composed of the Office of Capital Access, which includes the Director of Financial Assistance who develops the policies and procedures that help recruit lenders to capital programs, the Director for Credit Risk Management who reviews and approves lender applications, and the Director of Performance and Systems Management who manages the technology operations and enhancements to Lender Match. The Office of Field Operations provides support and outreach to recruit lenders to the program through Lender Relation Specialists.

Goal Strategies

Lender Match is a free online referral tool that connects small business borrowers with participating SBA lenders. Lender Match levels the playing field for borrowers searching for financing which may not be available to them locally, while enabling lenders to identify borrowers who best suit their lending criteria. Lender Match works by asking prospective borrowers to complete a short online form to provide information about the small business. Those responses are forwarded to participating SBA lenders who have expressed interest in working with these borrowers. The prospective borrower receives an email within two days with the interested lender's contract information.

Lender Match assists borrowers who may not be successful in applying for loans at larger financial institutions by matching them with smaller, mission-driven community financial institutions.

For more information visit: https://www.sba.gov/funding-programs/loans/lender-match

Strategy 1: Outreach to all Lenders
- Inclusion of Community Financial Institutions in all outreach and marketing of Lender Match
- Development and implementation of outreach strategies to target CFI lenders
- Enroll all new participants from Community Advantage in Lender Match

Strategy 2: Enroll active CFI lenders in Lender Match
- Convert one-time CARES Act lenders to participate in traditional SBA lending products
- Enroll current CFI lenders not currently enrolled in Lender Match

Strategy 3: Retention of enrolled CFIs
- Demonstrate the value of Lender Match to currently enrolled lenders

Key indicators

Key indicator(s)		Quantify progress			Frequency
A "key performance indicator" measures progress toward a goal target					When is there new data?
Name of indicator		Target value	Starting value	Current value**	Update cycle
Number of CFIs enrolled in Lender Match		243	200*	254	Quarterly
Number of CFIs active in 7(a), 504, or Microloan in current FY		480	480***	452	Quarterly

* Starting Value = As of October 1, 2021
** Current Value = As of June 30, 2023
*** Starting value is the FY22 total number of CFIs active in the fiscal year. Active in a Fiscal Year means making at least one loan in the fiscal year. Therefore, the "Starting Value" may be higher than the "Current Value."

Contextual indicators

Contextual indicator(s)		Quantify progress		Frequency
Name of indicator		Starting value	Current value**	Update cycle
Number of CFIs enrolled in Lender Match by type***	Community Development Financial Institutions (CDFI)	110*	135	Quarterly
	Minority Depository Institutions (MDI)	25*	32	
	Certified Development Corporations (CDC)	65*	92	
	Microlenders	60*	79	
Number of CFIs active in SBA lending programs (7(a), 504, microloan) by type***	Community Development Financial Institutions (CDFI)	FY22 Total: 213	199	Quarterly
	Minority Depository Institutions (MDI)	FY22 Total: 90	68	
	Certified Development Corporations (CDC)	FY22 Total: 193	183	
	Microlenders	FY22 Total: 139	141	

* Starting Value = As of October 1, 2021
** Current Value = As of June 30, 2023
*** These 4 groups are not mutually exclusive. The same lender may be counted in more than one category.

Key milestones Q1 – Q4 FY 2022

Milestone Summary

Key Milestone	Milestone Due Date	Milestone Status	Comments
Create "CFIs & Lender Match" agenda item for bi-monthly Lender call (between Community Advantage Lenders and SBA program leadership)	Q1 FY 2022	Complete	This agenda item will be a consistent reminder to leverage CA Lenders to build the Lender Match portfolio
Hold monthly internal stakeholder call with OFO to discuss CFI Lender Match guidance	Q2 FY 2022	Complete	Sessions with Field Offices focused on leveraging Lender Specialist relationships with local CFIs
Hold external stakeholder quarterly call with 7(a), 504, CA industry participants	Q2 FY 2022	Complete	Ongoing industry consultations with SBA lenders to promote SBA programs and provide education on SBA policies
Conduct lender outreach at NAGGL	Q3 FY 2022	Complete	SBA attended the NAGGL lender conference on May 11- 12, 2022
Conduct CDC outreach at NADCO	Q3 FY 2022	Complete	SBA attended the NADCO Spring Summit May 15-18, 2022
Hold monthly internal stakeholder call with OFO to discuss CFI Lender Match guidance	Q3 FY 2022	Complete	Call held on April 20, 2022
Conduct outreach at Opportunity Finance Network annual Conference	Q3 FY 2022	Complete	The SBA will attend and conduct outreach at the OFN annual conference that is rescheduled for October 2022
Hold external stakeholder quarterly call with 7(a), 504, CA industry participants	Q3 FY 2022	Complete	Program updates delivered: • 7(a) community: April 12 • CA Lenders and LRSs: May 24 & 26 • 504 community: June 28

Key milestones Q4 FY 2022 – Q2 FY 2023

Milestone Summary

Key Milestone	Milestone Due Date	Milestone Status	Comments
Hold monthly internal Stakeholder call with OFO to discuss CFI Lender Match guidance	Q4 FY 2022	Complete	Discussed Guidance at monthly call with SBA Office of Field Operations staff
Reach 239 CFI lenders in Lender Match	Q4 FY 2022	Complete	In FY22, Q4, 239 CFIs were enrolled in Lender Match, exceeding the FY 2022 target by 16.
Hold external stakeholder quarterly call with 7(a), 504, CA industry participants	Q4 FY 2022	Complete	The SBA conducted a total of 25 webinars to roll-out program changes (for a list of events, please see slide 11).
Conduct lender outreach at NAGGL	Q1 FY 2023	Complete	SBA attended and held breakout sessions at the NAGGL lender conference on October 25-26, 2022.
Conduct CDC outreach at NADCO	Q1 FY 2023	Complete	SBA attended and met with CDCs at the NADCO NDIR event November 14-17, 2022
Conduct outreach at Opportunity Finance Network annual Conference	Q1 FY 2023	Complete	SBA attended the OFN conference on October 21, 2022, in New York City with 150 CDFIs and discussed CA and Microloan Programs.
Hold monthly internal Stakeholder call with OFO to discuss CFI Lender Match guidance	Q1 FY 2023	Complete	Calls were held on Oct 19, Nov 20 and Dec 14, 2022
Hold external stakeholder quarterly Connect Call with 7(a), 504, CA industry participants	Q1 FY 2023	Complete	Program updates delivered: 7(a) community: Oct 11

Key milestones Q3 – Q4 FY 2023

Milestone Summary

Key Milestone	Milestone Due Date	Milestone Status	Comments
Hold external stakeholder quarterly Connect Call with 7(a), 504, CA industry participants	Q2 FY 2023	Complete	The 504 Connect Call was held on March 14, 2023. The 7(a) Connect Call was held on April 11, 2023, to align with the release of the updated SOP and rules to address persistent gaps in access to capital.
Hold monthly internal Stakeholder call with OFO to discuss CFI Lender Match guidance	Q3 FY 2023	Complete	Calls were held on April 18, May 17, and June 21, 2023. Lender Match goal was discussed at each call.
Hold external stakeholder quarterly Connect Call with 7(a), 504, CA industry participants	Q3 FY 2023	Complete	The 7(a)/CA Connect Calls were held on April 5 and June 7, 2023. The 504 Connect Call was held on June 13, 2023.
Conduct outreach at Regional or National events	Q3 FY 2023	Complete	In FY 2023 Q3, the SBA participated in the Mid-America Lenders Conference on April 20, the National Association of Government Guaranteed Lenders Conference April 23-26, the New England Lenders Conference on May 3, the National Association of Development Companies Spring Summit May 9-13, the Wisconsin Lenders Conference on May 10, the Military Bootcamp event on May 25, and the Tennessee Lenders Conference on June 6.

Narrative – FY 2023 Q3

Summary of progress

The SBA has successfully enrolled 254 Community Financial Institutions (CFIs) in Lender Match since October 1, 2022, surpassing the APG Goal statement ahead of schedule. By quickly expanding the number of CFIs participating in Lender Match, the SBA is facilitating connections between underserved borrowers and mission-based lenders, thus reducing the capital gap.

The Agency will continue to pursue strategies to enroll CFIs, provide information and training to SBA District Office employees, and engage with lenders to promote the use of the Lender Match platform. The SBA will provide comprehensive training for all Community Advantage and Microloan lenders whose missions are to increase access to capital in underserved markets. The training will include assistance for enrolling in Lender Match.

In FY 2023 Q3, the SBA continued to conduct internal and external stakeholder engagement to promote Lender Match and recent rule changes designed to reduce gaps in access to capital. The SBA held quarterly calls with the 7(a), 504, and Community Advantage lenders and participated in national, regional, and sector- focused events in Q3 to improve understanding of SBA loan offerings, the impact of recent rule changes, and the

Data Accuracy & Reliability

Name of indicator	Data Source	Reliability	Method
Number of CFIs enrolled in Lender Match	Treasury's CDFI Fund website, FDIC website, NCUA website, Capital Access Financial Systems (CAFS), Lender Match	High	Community Financial Institutions are defined as a Community Development Financial Institution (CDFI), a Minority Owned Depository Institution (MDI), a Certified Development Company (CDC) or a microlender. On a quarterly basis, lender profiles in Lender Match will be merged with three external and one internal source to identify CFIs participating in Lender Match. 1. Treasury's CDFI list: https://www.cdfifund.gov/programs-training/certification/cdfi 2. FDIC's MDI list: https://www.fdic.gov/regulations/resources/minority/mdi.html 3. NCUA's MDI list: https://www.ncua.gov/support-services/credit-union-resources-expansion/resources/minority-depository-institution-preservation/mdi 4. CAFS - Partner Information Management Systems (PIMS): SBA's lender database
Number of CFIs active in 7(a), 504, or Microloan in current FY	Capital Access Financial Systems (CAFS)	High	On a quarterly basis, SBA will merge Treasury's CDFI list, FDIC and NCUA's MDI lists with SBA's lender database (PIMS) to create a master list of CFIs with SBA lending agreements. Then, the SBA will determine how many of these CFIs made a 7(a), 504, or Microloan in the current fiscal year
Number of CFIs enrolled in Lender Match by type	Treasury's CDFI Fund website, FDIC website, NCUA website, Capital Access Financial Systems (CAFS), Lender Match	High	Same as 'Number of CFIs enrolled in Lender Match' but filtered by CFI type
Number of CFIs active in			

Exploratory research inputs

Preliminary content modeling/audit – APGs

CivicActions &

Exploratory research inputs

Preliminary content modeling/audit – ONDCP

CivicActions &

Research executive summary

In summer 2024, we embarked on a journey to **better understand** how federal employees report government **performance data quarterly**, and how that information ends up on **performance.gov**.

The team

Ivan Metzger
Product Owner
General Services Administration

Rey Echevarria
Project Manager
CivicActions

Adrienne Cabouet
Technical Lead
CivicActions

Alex Finnarn
Full-stack Engineer
CivicActions

Jenna Waszak
User Experience (UX) Lead
CivicActions

Through these **conversations,** we captured **ideas, considerations, and constraints** from subject matter experts that will inform how we approach designing and building a **new federal performance reporting submission portal**.

Acknowledgements

Thank you to the Office of Management and Budget's Performance Management team for helping us recruit performance community members, and for your continued collaboration and support related to this effort.

We wouldn't have been able to capture such insightful and illuminating feedback without all of the performance community members who volunteered to give us their time, expertise, and candor - we thank you tremendously for your contribution to this effort!

Research process overview

Our big questions

- What does the current APG quarterly update process look within agencies?
- What does the review process look like for OMB reviewers and agency executive reviewers?
- What is currently working that we should retain? What are the key points of frustration?
- What sort of additional guidance or support is needed to help them complete the goal reporting updates?

Research methodology

- Conducted structured, yet conversational, user interviews via Zoom.
- Interviews lasted between 45 minutes to 60 minutes, and were primarily 1:1, with two sessions that included more than one agency stakeholder.
- Interviews were not recorded, but a notetaker was present.
- Quotes were extracted from the notes document and then grouped based on themes and responses to the same question to identify trends.
- We gathered insights, key takeaways, and created a user story database.
- Responses are anonymized and won't be attributed to any person or agency.

Who we spoke to

24
user interview sessions completed

11
federal agencies/offices represented

Roles represented

- Agency performance and management analysts
- Agency performance leads & directors
- Deputy performance improvement officers
- OMB performance managers
- OMB program examiners
- Customer Experience (CX) team
- President's Management Agenda team

Our interviewees had a range of three months to seventeen years of federal performance reporting experience.

Key takeaways

What works well

- **Collaboration & relationship building**
  - Trust and respect amongst colleagues was cited by many teams as integral to the success of the process
- **Respect for the review process and the accountability it creates**
  - Many teams agree that the multi-step review process facilitates internal alignment, while preserving the objectivity, integrity, and accuracy of the reported results
- **Having a template and guidance is helpful**
  - Teams appreciate templates to help them communicate and facilitate the reporting process

Key risks & challenges

- **Burden of coordination, timeline adherence and risks related to manual review**
  - Due to disparate systems, not being able to leverage cloud documents, and not having a lot of automation or system-enforced checks and balances in place, a lot of time is spent coordinating comms and getting folks to adhere to the process on time, reconciling feedback and formatting, and manually prepping, comparing, and updating content
- **Loss of institutional knowledge related to the reporting process**
  - Due to a reliance on email and varying levels of maturity related to process documentation, some agencies have a longer runway to ramping up and supporting goal reporting teams as well as new performance team members

Things to know going forward

- **We want to preserve agency autonomy to set their own review process**
- **The federal performance community wants to learn from and collaborate with eachother**
- **Providing context, nuance, and narrative related to performance progress is just as important as presenting metrics and milestones**

Key features and functionalities for a submission portal to consider based on interviews

- Customizable permissions and content approval workflows
- Ability to import and upload data, documents, and images
- Version control and revision history
- Track changes-like editing and commenting experience
- Defined content types and page templates
- Intuitive search experience and global taxonomies

How does the performance community talk about or refer to performance.gov?

We ask this question to understand how the performance community communicates and perceives performance.gov as a product in its current state. We can also begin to understand how they champion the reporting process, and activate their own stakeholders.

While some people had very quick and compelling answers, others speak only about certain parts of the site and not about performance.gov as a product or tool, if at all.

> It's a transparency tool to show what the government is doing. It's also a way to get the people involved.

> I don't typically describe it, I point people to it internally to help them understand how the inputs they provide end up on a public website. I say, it's the US gov's public facing performance info website.

> It's a website that we use to showcase and share all of the agencies' performance, goals and metrics.

What tools are being used to facilitate the reporting and review process?

Technical stacks can vary not just from agency-to-agency, but also even office-to-office within larger agencies.

Different file formats can cause formatting issues and increase the burden on performance teams to ensure the legibility of the document.

Some interviewees reported not knowing if their final document post-Powerpoint conversion retained their original format. They mentioned that they send it off with a hope and a prayer that it looks correct since they can't review it without the proper software licensing.

We know that there will always be preferred stacks across organizations, but *how might we* streamline the tools used related to the quarterly reporting process.

- Airtable
- Data Wrapper
- Google Docs
- Google Drive
- Google Slides
- Internal enterprise dashboards
- Mattermost chat
- Microsoft Word
- Microsoft Excel
- Microsoft Powerpoint
- Microsoft Teams
- OMB Collect
- OMB Max
- Onestream
- PowerBI
- Sharepoint
- Smartsheets
- Socrata
- Touchpoints
- WebEX
- Zoom

Many performance community members did not self-identify as having worked with a content management system before

While many in the agency performance community have worked with various data or content systems, a majority of them said that they had not worked with a content management system like Drupal, Wordpress, etc. before. Some of our stakeholders in OMB and GSA have worked with various content management systems before.

This is good context to understand so that we know what sort of training we may need to prepare in the future if we onboard performance teams into a new system or process.

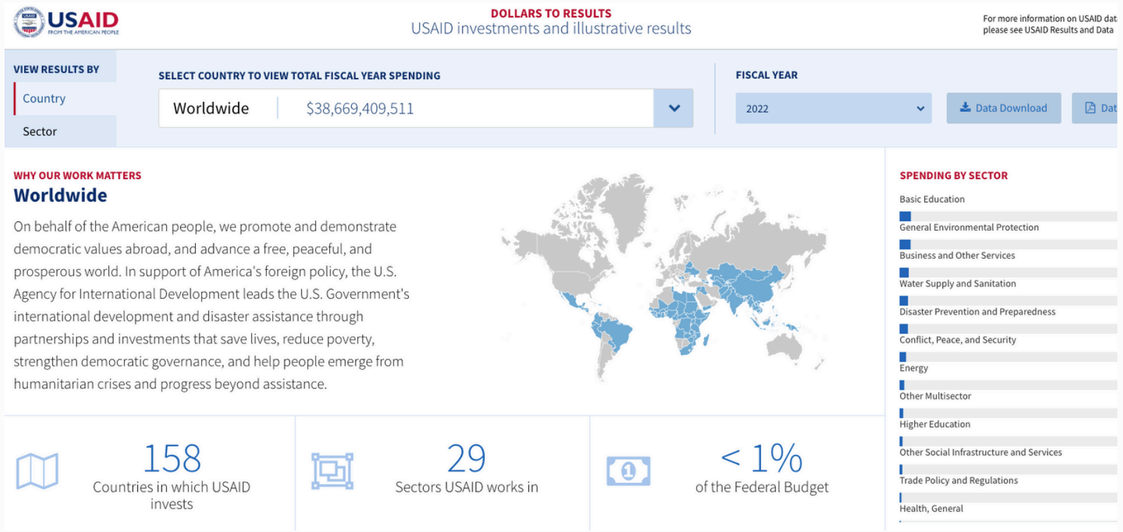
Many people did acknowledge that there are better ways to handle the performance content and information collection process, they just were uncertain what it would take to get there.

Other performance dashboards and experiences that came up

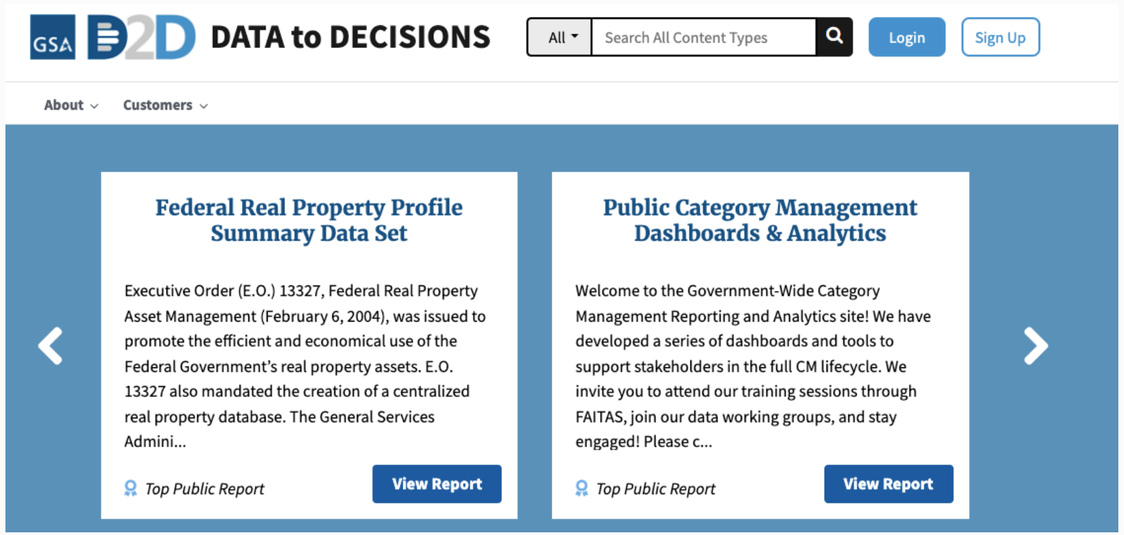
Some agencies leverage their performance data beyond their performance reports and have created public-facing experiences that also provide info on other metrics and provide additional context.

Examples that came up include USAID's Dollars to Results site and U.S. Department of Commerce's performance site.

Many agencies also capture data in internal dashboards, which range from being manual spreadsheets all the way to more robust data solutions. GSA's Data to Decisions portal came up, as well as Organizational Health Index (OHI) internal dashboards.



results.usaid.gov/results



d2d.gsa.gov

There are many pieces to the performance reporting ecosystem

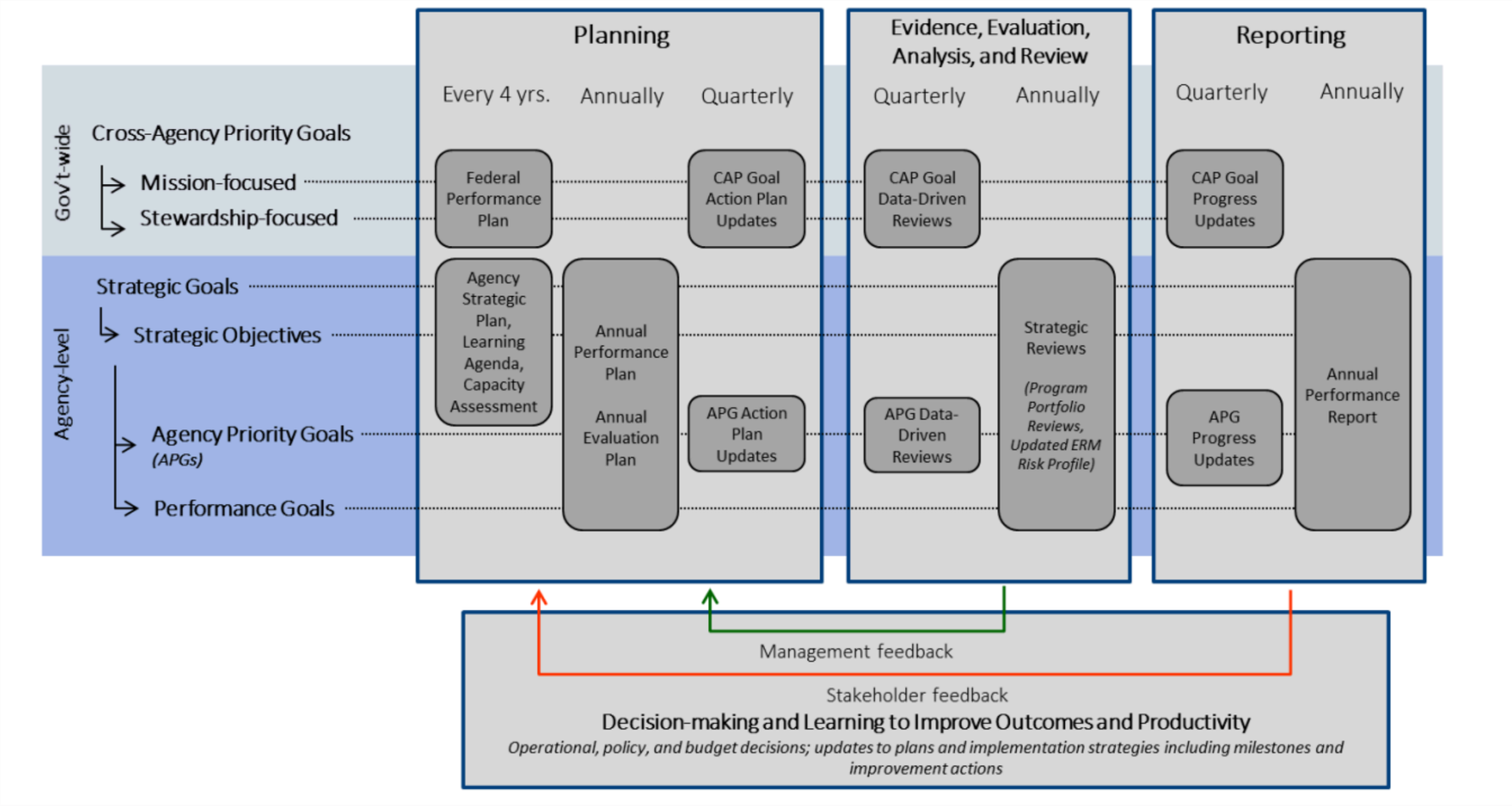
There are many pieces to the performance reporting ecosystem - from the quarterly updates presented in the President's Management Agenda and in Agency Priority Goal reports, to strategic plans and annual performance plans and reports.

Performance narratives and data are leveraged in budget planning and reports, and are increasingly being leveraged in risk analysis and mitigation efforts.

While some agencies collect additional data when they solicit performance updates, often times a lot of the different performance reports are completed separately from one another. This is largely due to the scope of different performance documents, with some being future-focused and others being more retrospective.

Some data, such as the APGs, can be found in multiple reports, which is something to consider for the future.

A look at the performance management ecosystem



Source: OMB Circular No. A-11 Part 6

Getting to know performance teams

We spoke with people in various roles of the quarterly reporting process to understand what their day-to-day looks like

There are many different people who are directly and indirectly responsible for making the agency priority goal reporting process happen.

The reports move through various departments and levels within an office or agency. Reports are reviewed for plain language, for accuracy, and for objectivity. They receive copyedits and developmental edits.

Much of the communication between review layers is done either by email or via comments in various documents, most of which are not cloud documents.

Everyone involved in the goal reporting process wears multiple hats and have a lot on their plates in addition to their APG reporting responsibilities.

Many of them are performance advocates and educators - championing accountability, progress, blockers, and accomplishments throughout their organization via the performance reporting process.

Defining task-based agency roles

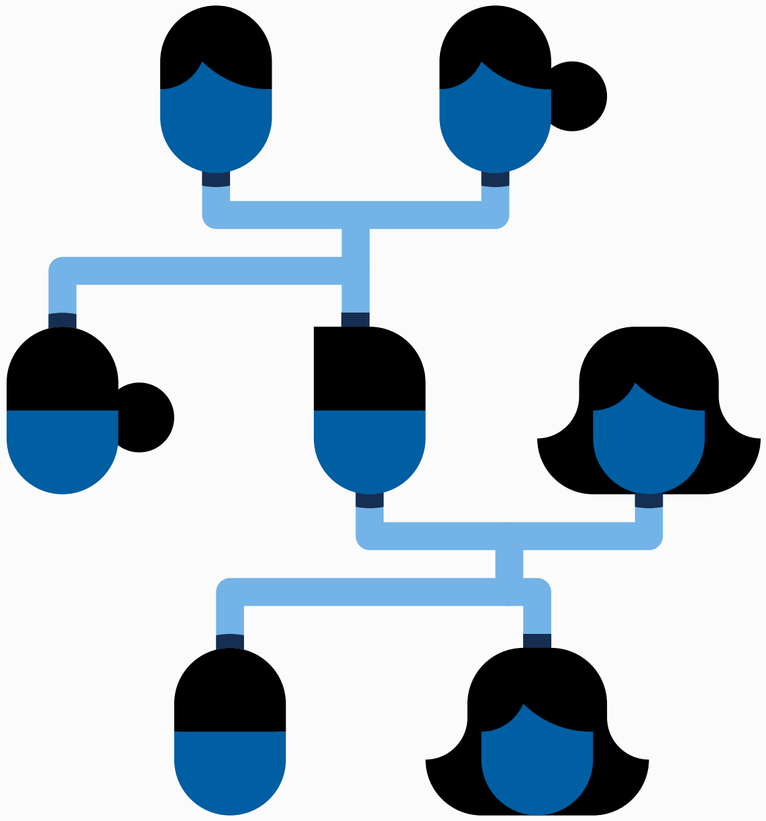
Official job titles can vary across organizations. There are also official performance titles and roles defined by the Office of Management and Budget (for more information, refer to circular OMB Circular No. A-11, Part 6.)

In previous research efforts, contributors to the reporting process have been referred to as “creators.”

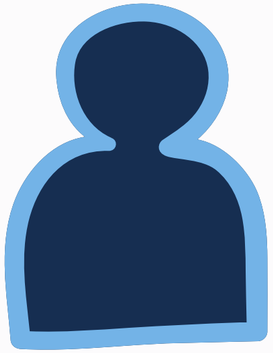
To standardize task-based roles across organizations and further segment the “creator” role, we have created different personas to refer to the key tasks people must complete in the quarterly reporting process.

This standardization also helps to think about role-based permissions, governance structures, as well as editorial workflows.

We acknowledge that there are varying levels of nuance and complexity to how teams are structured at each organization. These personas are designed to cast a wide net and facilitate understanding, and are not intended to replace any official or preset titles or roles.



Defining task-based agency roles



Agency performance reporter

Also referred to here as: Goal team members

Where they sit: Goal teams at the agency, sub, or sub-sub agency

Who they are: Performance reporting is one sliver of the work they do - they are also in the field, working toward the goals getting done that they are reporting on. They are SMEs - they may be scientists, case workers, etc.

Content creation/review scope: Write first draft of narratives, provide quarterly updates on milestones, data points, edits templates provided by performance teams, they may also enter data in other platforms.

What's important to them: Meeting the requirements related to reporting the data, not having reporting take a lot of time, telling their story related to their progress, blockers, and achievements.

Defining task-based agency roles

Agency performance coordinator

Also referred to here as: Coordinators

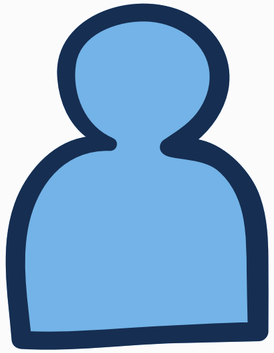
Where they sit: Performance team at the agency, sub, or sub-sub agency

Who they are: Agency performance coordinators are often analysts or performance officers in title. They usually wear multiple hats, and are involved not just in APG reporting but other performance reporting efforts such as budget requests, APPRs, etc. They are key facilitators of the agency-side performance reporting process.

Content creation/review scope: First eyes on the documentation. They do light to substantive editing related to the narrative, plain language, objectivity, and check for accuracy and relevancy of updates to new documents. They shepherd the information through the process, socializing timelines, expectations, and guidance.

What's important to them: Building trust with their goal teams, plain language, storytelling, meeting deadlines, advocating for and educating about performance management and reporting.

Defining task-based agency roles



Agency performance manager

Also referred to here as: Performance managers or leads

Where they sit: Performance team lead at the agency, sub, or sub-sub agency

Who they are: Performance managers function similarly to coordinators, but also have oversight over coordinators.

Content creation/review scope: Usually second eyes on the documentation, they provide more developmental feedback, reviewing for the general public, and to ask any additional questions of the information or how it is presented.

What's important to them: Clear and understandable messaging, content is consumable by the general public, teams are operating efficiently and meeting deadlines, accuracy, objectivity, and storytelling.

Defining task-based agency roles

Agency executive reviewer

Also referred to here as: Agency reviewers

Where they sit: Senior and executive leadership

Who they are: Executives such as deputy secretaries, secretaries, PIO, deputy PIOs, directors at the agency, sub, or sub-sub agency or office/department level.

Content creation/review scope: Multi-leveled, final reviews of the document before it heads to OMB for review.

What's important to them: Accuracy, narrative and storytelling, overall messaging, building confidence in the government, championing progress.

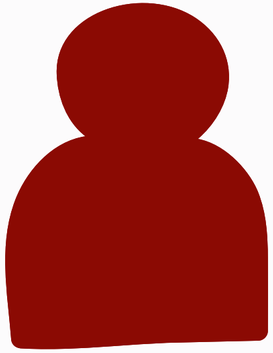
Other teams involved in the process

OMB performance management team

Sitting on the management side of OMB, they coordinate cross-government performance reporting and guidance.

OMB program examiners

Sitting on the budget side of OMB, program examiners are subject matter experts who collaborate closely with their assigned agency.



GSA's Performance.gov digital services team

The Performance.gov team consists of full-stack engineers and user experience specialists.

How the agency priority goal quarterly updates move through the process

About this diagram

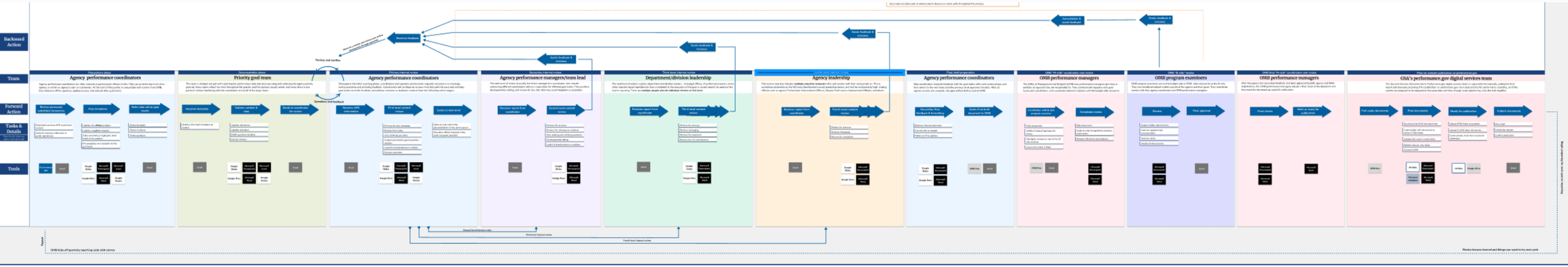
The information presented here is the synthesis of 24 different user interviews completed with federal agency performance professionals representing performance teams from over 11 agencies and offices.

Every agency has its own unique internal processes related to who is involved in the agency priority goal (APG) reporting review and creation cycle, and how exactly they manage their updates to the official APG template.

This diagram is intended to show a high-level yet realistic example of what this process may look like at different agencies. For some agencies, there are less internal review levels, while for others, there may be significantly more.

The bird’s-eye view

There are many steps in the Agency Priority Goal (APG) reporting process, and a key callout is the back-and-forth movement of the information that can’t be fully translated to this medium. The next few slides will zoom in on more of the forward motion of the APG process, and will illustrate the steps and tools used in each phase of the process in its current state.



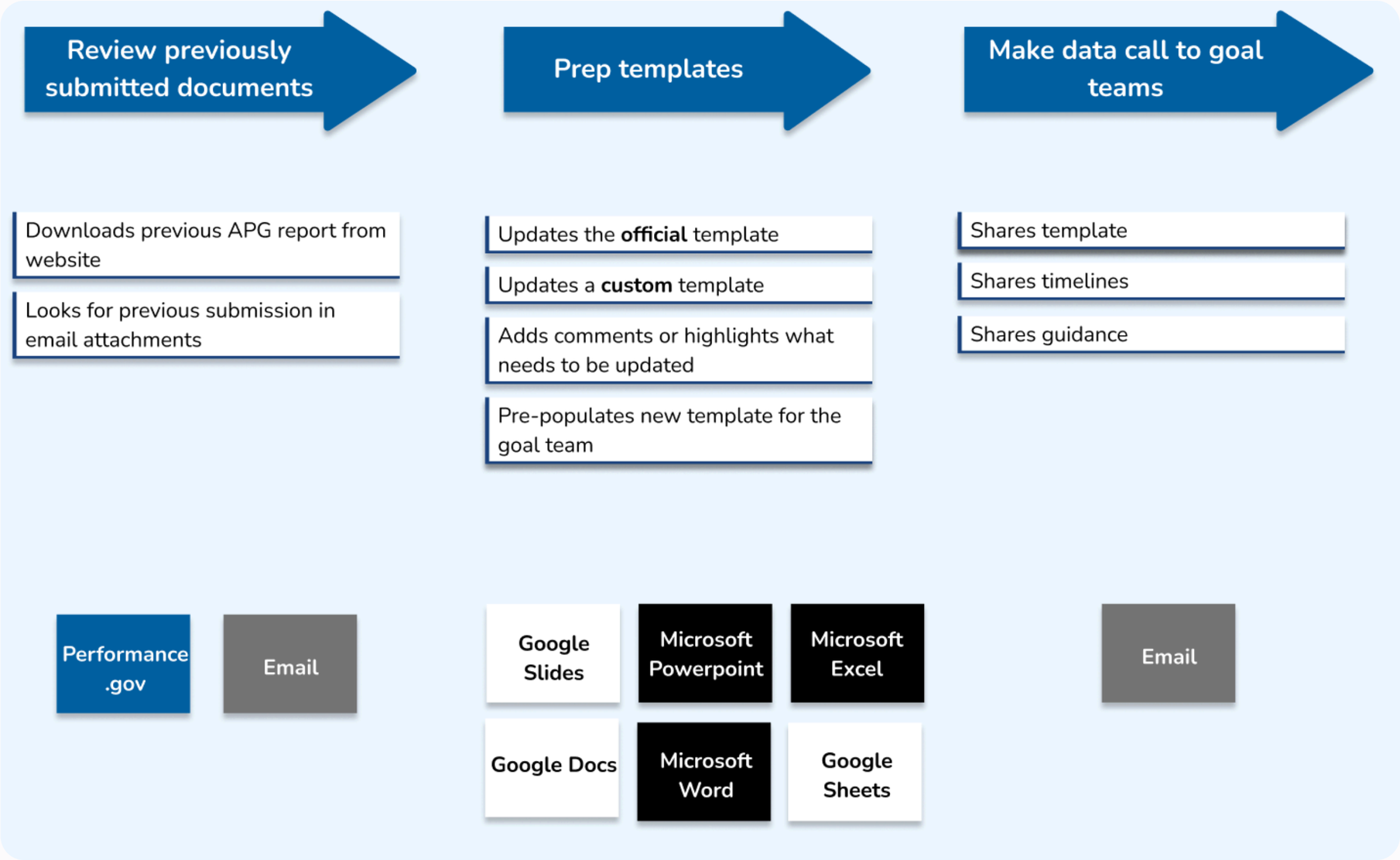
Explore the full process diagram

The prep phase

Agency performance coordinators

Agency performance coordinators are often analysts or performance officers in title. They can sit at the top-level of an agency, or within an agency's sub- or sub-bureau.

At the start of the quarter, in conjunction with comms from OMB, they help kick-off the quarterly update process, and activate their goal teams.



Revises and clarifies

Questions and feedback

Documentation phase

Priority goal team

This team is charged not just with reporting the performance data, but also executing and achieving the agency priority goal set. Many teams collect the data throughout the quarter, and this process usually works well when there is one point-of-contact interfacing with the coordinator on behalf of the larger team.

Receives template

- Updates other team members as needed

Email

Gathers content & data

- Updates milestones
- Updates indicators
- Drafts quarterly narrative
- Internal reviews

Google Slides | Microsoft Powerpoint | Microsoft Excel | Google Docs | Microsoft Word | Google Sheets

Sends to coordinator for review

Email

Primary internal review

Agency performance coordinators

Throughout the initial reporting phase, coordinators and reporters communicate regularly via email or in meetings, asking questions and providing feedback. Coordinators will facilitate all reviews from this point forward, and will help goal teams reconcile feedback and address revisions as feedback comes in from the following review stages.

Receives APG information

Email

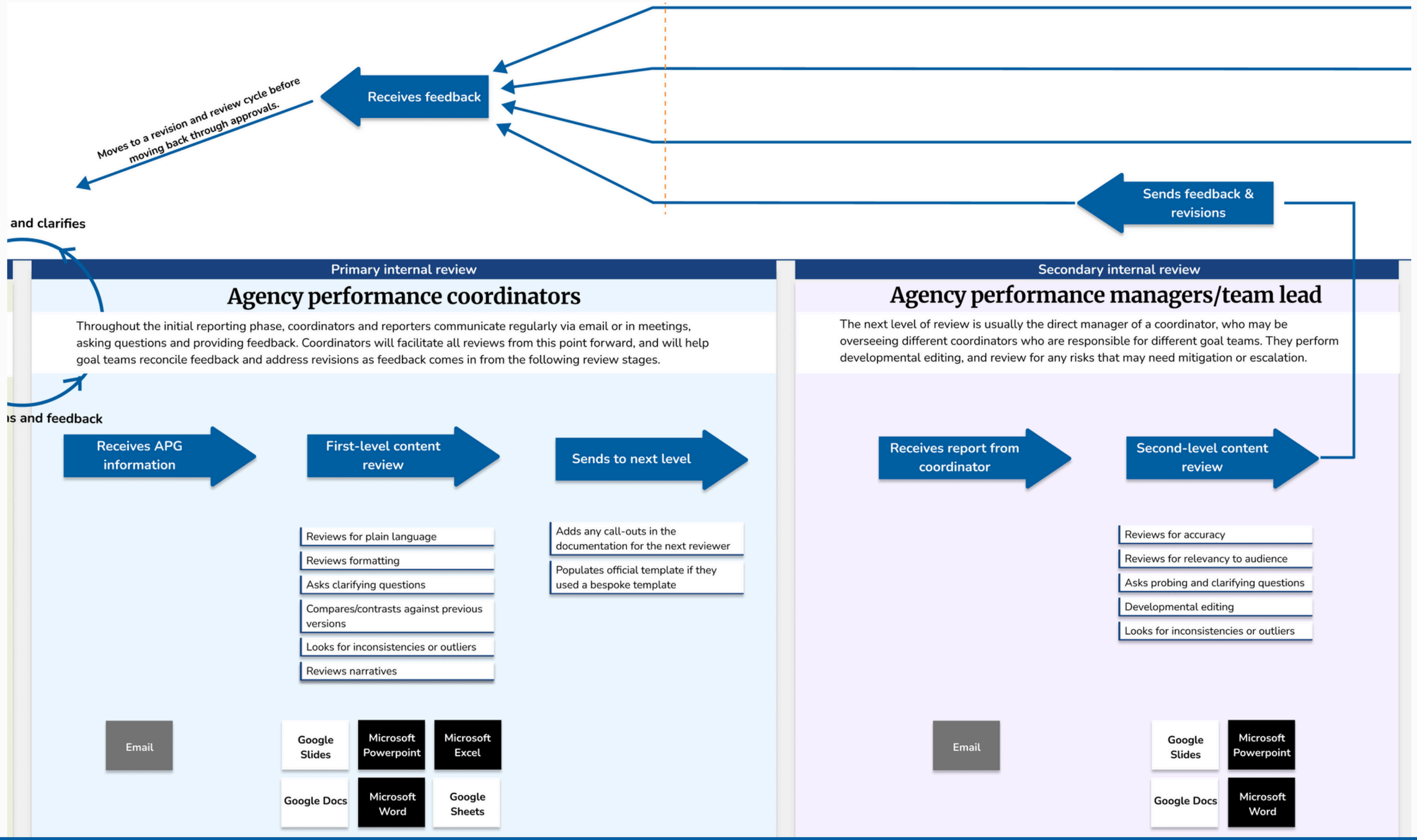
First-level content review

- Reviews for plain language
- Reviews formatting
- Asks clarifying questions
- Compares/contrasts against previous versions
- Looks for inconsistencies or outliers
- Reviews narratives

Google Slides | Microsoft Powerpoint | Microsoft Excel | Google Docs | Microsoft Word | Google Sheets

Sends to next level

- Adds any call-outs in the documentation for the next reviewer
- Populates official template if they used a bespoke template


Moves to a revision and review cycle before moving back through approvals.
Receives feedback
Sends feedback & revisions
and clarifies
s and feedback
Primary internal review
Agency performance coordinators
Throughout the initial reporting phase, coordinators and reporters communicate regularly via email or in meetings, asking questions and providing feedback. Coordinators will facilitate all reviews from this point forward, and will help goal teams reconcile feedback and address revisions as feedback comes in from the following review stages.
Receives APG information
First-level content review
Sends to next level
Reviews for plain language
Reviews formatting
Asks clarifying questions
Compares/contrasts against previous versions
Looks for inconsistencies or outliers
Reviews narratives
Adds any call-outs in the documentation for the next reviewer
Populates official template if they used a bespoke template
Email
Google Slides
Microsoft Powerpoint
Microsoft Excel
Google Docs
Microsoft Word
Google Sheets
Secondary internal review
Agency performance managers/team lead
The next level of review is usually the direct manager of a coordinator, who may be overseeing different coordinators who are responsible for different goal teams. They perform developmental editing, and review for any risks that may need mitigation or escalation.
Receives report from coordinator
Second-level content review
Reviews for accuracy
Reviews for relevancy to audience
Asks probing and clarifying questions
Developmental editing
Looks for inconsistencies or outliers
Email
Google Slides
Microsoft Powerpoint
Google Docs
Microsoft Word

Sends feedback & revisions

Third-level internal review

Department/division leadership

The next level of review reaches department and division leaders - of budget offices, of performance teams, of any other relevant department/division that contributed to the execution of the goal or would need to be aware of the team's reporting. There are **multiple people who do individual reviews at this level.**

Receives report from coordinator

Third-level content review

- Reviews for accuracy
- Reviews messaging
- Reviews for awareness
- Reviews for risks and blockers

Email

Google Slides

Microsoft Powerpoint

Google Docs

Microsoft Word

Sends feedback & revisions

Fourth-level internal review

Agency leadership

This review step also includes **multiple executive reviewers** who each review with their various hats on. This is sometimes referred to as the HQ-level (headquarters level) leadership review, and will be completed by high-ranking officials such as agency Performance Improvement Officers, Deputy Performance Improvement Officers, and others.

Receives report from coordinator

Fourth-level content review

- Reviews for accuracy
- Reviews messaging
- Reviews for awareness

Email

Google Slides

Microsoft Powerpoint

Google Docs

Microsoft Word

Final draft preparation

Agency performance coordinators

Most coordinators reconcile feedback with the goal teams after each review phase, and then send it to the next level once the previous level approves the edits. After all agency reviews are complete, the agency final draft is sent to OMB.

Reconciles final feedback & formatting → **Sends final draft document to OMB**

- Resolves internal comments
- Converts file as needed
- Makes any final updates

Google Slides | Microsoft Powerpoint | Google Docs | Microsoft Word

OMB Max | Email

OMB "M-side" coordination and review

OMB performance managers

The Office of Management and Budget's (OMB) two performance managers each have a portfolio of agencies they are responsible for. They communicate regularly with goal teams and coordinators, and coordinate reviews in tandem with the budget side reviewers.

Coordinates with B-side program examiner → **Completes review**

- Pulls documents
- Notifies B-side of readiness for review
- Highlights sections to note for the B-side reviewer
- Ensure all content is there

OMB Max | Email

- Pulls documents
- Looks at what changed from previous submissions
- Reviews milestones and progress

Microsoft Powerpoint | Microsoft Word

OMB "B-side" review

OMB program examiners

OMB program examiners are on the budget side of OMB, often referred to as the B-side. They are considered subject matter experts of the agency and their goals. They coordinate closely with their agency coordinator and OMB performance managers.

Review → Final approval

- Subject matter expert review
- Asks for supplemental documentation
- Asks for clarity
- Double checks accuracy

Microsoft Powerpoint

Microsoft Word

Email

OMB final "M-side" coordination and review

OMB performance managers

After the agency has reconciled feedback and been approved by both agency and OMB stakeholders, the OMB performance managers will do a final check of the document and then mark the document as ready for publication.

Final checks → Mark as ready for publication

Microsoft Powerpoint

Microsoft Word

Microsoft Excel

GSA's performance.gov digital services team

The General Services Administration's Performance.gov digital services team is responsible for manually pulling the final report and manually preparing it for publication on performance.gov. As is best practice for performance reporting, all of the reports are prepared to be released on the same date and time, though some reports may miss the final deadline.

Pull ready documents

OMB Max

Prep documents

- Download into RAW desktop folder
- Copies folder with documents to create CLEAN folder
- Updates file name in ready folder
- Deletes internal-only slides
- Convert to PDF

Airtable | Microsoft Powerpoint | Personal computer | Microsoft Word

Ready for publication

- Upload RAW folder documents
- Upload CLEAN folder documents
- Communicate which docs have been addressed

Airtable | Google Drive

Publish documents

- Run script
- Coordinate release
- Confirm publication

Email

SWOT Analysis

After synthesizing the user interview notes, we captured high-level insights and themes, and categorized them using the SWOT framework.

SWOT analysis stand for Strengths, Weakness, Opportunities, and Threats.

Strength - preserve the essence of what is working

Weakness - something we should work to fix

Opportunity - ways we could consider improving the process or digging into further

Threat - something that we should stay aware of, but may be out of scope for us to solve

Sharing insights from our users

The quotes presented in the following slides may have been paraphrased or edited for clarity, conversational context, and to preserve anonymity.

Strengths

What is currently working that we should continue to preserve the essence of

Insight

People like leveraging performance.gov as an exploratory tool.

Considerations and takeaways

While Performance data lives on performance.gov, there are other performance reports that live on agency sites.

Providing links to related resources as well as related topics is useful for users who are browsing, and simplifies the information hunt even for savvy users.

> Once it's on performance.gov, you could have a user browsing around to find something that they wouldn't find otherwise.

> Performance.gov saves me time. A lot of people don't know a lot about performance.

> It's a good jumping off point to say why this matters and where we publish it.

Insight

Framing the data with the quarterly narrative update is key.

Considerations and takeaways

When asked what the most important/valuable piece of information collected in the reporting, a majority of interviewees noted that the narrative context about the goal's quarterly progress is the most important piece.

This is largely because the narrative helps provide context as to why there may be challenges or blockers to achieving the goal, as well as explaining certain terms.

Ensuring the narrative and that data are presented together is perceived as a risk mitigation tactic as well to discourage bad actors from misrepresenting the data points without context.

> "You invent problems that you never would have come across if you give everyone all the information without context.

> "You want to be sure that the data going out into the universe is well framed. Context is important.

> "We want to curate the way [the goal teams] tell the story. Some things are in their control and some are not.

Insight

Fostering trust between people is a key function in preserving the integrity of the process.

Considerations and takeaways

Look for opportunities to empower stakeholders and retain trust in any improvements or features we add to a CMS.

Automating email reminders, as well as multi-level notifications across a section or region of the system could help alignment.

> It's all internal processes, getting to know your people.

> A lot of behind the scenes trust building. Interactions are respectful, accurate, helpful so you can lean into that when you need some quick movement.

> ...the team spends a lot of time building trust and rapport with the people that they work with.

Insight

It is helpful for goal teams to see what they submitted previously.

Considerations and takeaways

While the previous information submitted should not be editable, it is helpful for reporting teams to see what they submitted previously so they know how to update their new information. Having easy access to this in a CMS would be a win.

Many of the performance coordinators are pre-populating the templates they send to stakeholders each quarter.

> Templates are sent with previous information pre-populated, but [the performance coordinators] have the blank one available from the kickoff process if they need it.

> I look at the previous report to see what needs to be updated this quarter.

> I send each APG team's point-of-contact the packet on the first day of the new quarter for the previous quarter.

Insight

Not all content is supposed to change with each APG quarterly update.

Considerations and takeaways

A submission portal experience will need to be able to lock down content at a certain point in a workflow or permission level to preserve its integrity and ensure it is not altered.

> Evergreen info is less valuable [to be in the template each quarter], like the goal strategies and goal team. This only needs to be captured once.

> It would be better if [the pieces of information that are updated] are the only ones that moved [through the review process] every quarter.

> People try to change their goal statements, but they need to focus on the high value info.

Insight

Having a way for reviewers to provide comments, but not edits, would be helpful.

Considerations and takeaways

Currently, the comment function of Google Slides/Docs or Microsoft Word/Powerpoint is being leveraged as a communication tool between different groups of people, in addition to email.

Some folks do more developmental editing instead of copyediting, wherein they are asking for more exposition, narrative, or for higher-level questions to be answered in the documentation.

> I am not doing significant revisions, more posing questions.

> This back and forth is mostly just comments in template, but email pointing to the comments, but sometimes questions and comments in their email as well.

> People try to change their goal statements, but they need to focus on the high value info.

Insight

Adding notes or flagging certain sections for review is helpful for upstream reviewers in order to reduce the amount of time users are reviewing information.

Considerations and takeaways

The essence of what is happening here is that people are drawing focus to certain fields that need focused review or updates.

> My workaround was to have agencies highlight their changes with a different color, otherwise it was hard to figure out.

> I leave notes for reviewer: comments on power point slides that X amount has changed about Y amount from last quarter - this helps as the higher-level reviewers are able to perform the clearance process faster

Insight

Moving the performance information throughout the organization helps to bring awareness to successes or challenges, and fosters conversations throughout various levels of leadership.

Considerations and takeaways

While our goal is ultimately to make the information public, agencies leverage the review process as a forum to flag blockers and raise awareness. Keeping some fields internal-only will help coordinators continue to facilitate this effort.

> [During the review process there is] lots of internal engagement, conversations and discussions, but it's very organized.

> Getting it to pgov is a secondary benefit.

> It's also a chance to identify roadblocks, if something isn't moving forward - keeps everybody up to date and informed.

Weaknesses

What we should work to fix

Insight

Because the information moves by email, there is risk of information not going through the proper review chain.

Considerations and takeaways

A defined, single-reviewer-at-a-time workflow could reduce the risk of people not following the review chain, especially for those who are further downstream in sub-sub-agencies.

> We try to respect that chain of command but we also need HQ and bureau to respect that flow so they're not going directly to divisions, so that we can make sure all the information that is shared up is consistent.

> The more they go through the performance officer, the better. If things end up being assigned to other people, she has to watch to make sure things are correct.

Insight

Coordinators manually compare and contrast documents to ensure the content is new and to see what has changed.

Considerations and takeaways

Version control is an important feature, as well as a way to compare content changes.

They will also go on performance.gov to look at previous versions so they can compare and contrast and make sure people aren't changing verbiage or numbers that shouldn't be changed.

> [In my review, I'm] checking if it's just copy-paste, checking if all graphs are updated .

> It should be a whole new update - every slide should be new and not carried over from the previous quarter.

> We're making sure it's a NEW update that the public can get value from.

Weakness

Insight

In general, most performance coordinators or leads aren't held to any success metrics related to how their content performs on performance.gov. They also don't have immediate visions of what success might look like for their content on the site.

Considerations and takeaways

Varying engagement from agency senior leadership related to performance impacts this. Coordinators and managers seemed aware that the information is not getting a lot of traction, especially for those who have sought out analytics data.

As we enhance the site and improve the editorial experience, empowering coordinators with data to track engagement over time would be useful.

> [Our leadership] is not tracking [performance info]. The level of sophistication is still so low.

> People just need to know what [my agency] is and what we do.

> But if we could make the info more attractive, I could see looking at the number of clicks, A/B testing, figuring out what communications work best.

Weakness

Insight

There was initial hesitation in many of the conversations when asked what they want a user to do next after reading the performance report.

Considerations and takeaways

Teams may need additional support or guidance identifying CTAs related to their content.

There was also an uncertainty around who their target audience is.

> [A user] wouldn't have much to do.

> This keeps the general public informed. I would want the public to say, "Oh I didn't know the government did that."

> Reports are more for information. Hopefully we're detailed enough that they don't have questions.

Insight

Leveraging non-cloud based documents presents version control challenges.

Considerations and takeaways

When documents pass between orgs who use different systems, they can't leverage cloud-based documents. This is especially so for the PMA content, as well as when APG documents are added to OMB max.

> Tracking changes is important in terms of version control, but the email process has risk with downloading and reuploading the doc over and over again.

> People get edits in late so the versions I'm working on aren't the most up-to-date version

> Either way you do it, you run into version control issues. Teams are pretty organized now and keep meticulous documentation though.

Insight

The further downstream a goal team is, the tighter the turnaround time feels.

Considerations and takeaways

For larger agencies with many levels, the "HQ" level primarily interacts with OMB, and then deadlines and comms trickle down.

Teams further down the pipeline are less inclined to know the status of their report once it is submitted, or what the final deadline is. They reported they often get very short turnaround times and have to rally their teams and try not to erode trust.

> We have not been getting tasking requests on a consistent basis. It's been very short notice.

> Having to relay, “need your response in 5 minutes” impacts relationship with mission offices adversely.

> I send info to them [OMB] and they may get back the day before due date.

Insight

Different tools and systems create formatting and display issues.

Considerations and takeaways

While many folks are making the system work, they have adapted to its deficiencies and challenges.

There is a lot of effort currently spent on cleaning up document formatting. Some folks aren't able to even review a document once it is converted to a Powerpoint due to licensing/technical stacks.

Performance teams are burdened by reconciling formatting issues, and distracts from more meaningful support they can provide their goal teams.

> One issue always is that we use Google platform and not Microsoft - this is a constant source of consternation through every layer of government.

> We use google at [agency] and the graphics and formatting and such don't copy over well having to put it in powerpoint

> 100% of my job is in GSuite (docs, slides) so converting to Power Point isn't a problem, but the conversion causes the spacing to be off. I can't see what they're seeing on their end at OMB (apparently they can see it okay, but I know the PP they see looks different from what I see).

Insight

People are reliant on personal knowledge and on-the-job training to understand how the performance reporting cycle works.

Considerations and takeaways

There is a huge risk for knowledge loss due to turnover and attrition, as well as a lot of time spent learning and onboarding for new employees or new goal reporters.

> My team is doing a standard operating procedure document because there was no doc to tell me how to do the reporting; I had to learn on the job.

> An important person left. What are we going to do without their emails?

Weakness

Insight

A lack of a knowledge base or central location to house an SOP creates a lot of additional relearning or rework.

Considerations and takeaways

This was an emerging theme in other insights as well.

> An SOP would have been handy and prevented a lot of re-work. Lots of things just aren't intuitive to someone who hasn't been at the agency awhile.

> A bottleneck is that the teams need to find the Word document. They're not in an accessible place or central location for people to find word documents and they rely on going back to previous versions.

> Teams are mainly finding/tracking documents in email. We tried to create a Max page to keep this content on, but it doesn't get much use. We might need to revisit that.

Insight

Goal reporting teams have a lot of other things going on in addition to the performance report that they need to focus on besides performance reporting.

Considerations and takeaways

By optimizing the reporting process, we can reduce the burden on goal reporting teams and performance coordinators/managers so that they can focus more on the important work they do, rather than the more tedious administrative tasks.

> The sheer volume of workload, so many priorities. APGs is part of our core work, but the people working on it are working on many other things.

> Bureaus have a strong online presence, between that and press releases and federal register notices, I think from their view they have enough means to get info out, and frankly the APG, they see it as more of a requirement than a way to communicate.

> People that do the regular reporting are “voluntold”. They view it as more of a compliance exercise instead of getting in the spirit of it.

Insight

Coordinating the reporting can be a burden due to many factors.

Considerations and takeaways

While we know that the teams have a lot going on, the coordination aspects of the reporting process can be the most burdensome and tiresome - looking through emails, people going to the wrong people, misaligned guidance, reconciling comments, comparing documents etc.

Coordinators can spend more time supporting the team with content, goal setting, storytelling, education, etc. if they have more time.

> The teams are always shifting, so there's a lot of re-learning things that happens. It's not always someone that has done already done the work before. There's a lot of time taken up by the coordination.

> The APG's are repetitive. Burden reduction. It might be tedious for the teams to update quarterly.

> It's just another challenging thing to coordinate, every quarter. Usually delays in us getting the info back, and usually some back and forth with the team that takes more time.

Insight

Things are hard to find on the current version of performance.gov.

Considerations and takeaways

There is not a consistent main navigation across the site, and there are inconsistent navigation patterns and visual experiences. There is also not a site search. This is noticed by people who interact regularly with the site.

> Performance.gov has gotten better, but if I had to go find it on my own without a link to it [my APG] would be hard to find.

> It's so big; Where's the link to where we need to go?

> Right now, you have to know where to go to find the information.

Insight

Extensive amounts of track changes can be overwhelming.

Considerations and takeaways

One interviewee likened receiving large amounts of tracked changes as getting an essay back from a teacher with red pen and a failing grade on it.

We need to make this a less overwhelming and anxiety-inducing experience.

> OMB requested that we shift to Word this time, helpful, you can use track changes, but it invited more heavy handed editing because it's easier to do.

> The docs would crash my computer. There were like 10,000 track change edits.

> Tracked changes can overwhelm the bureau sometimes.

Insight

Timelines can be tight or seem like a moving target, especially for those more downstream.

Considerations and takeaways

Having a dashboard where users can see the review status of their information would be helpful, as well as an easier to find place where they can see their agency's due dates, as well as OMB's.

> Sometimes [other review levels] will ask for a tight turnaround but there is an understanding that it's not possible. Creates a strained relationship with people that we work with.

> We work backwards from the deadlines in A11, assuming they don't change during the year. Give our teams as much time as they can to get the info together, clear it through their levels, then clear it though our levels.

> Internal deadline is 3 weeks out from when I send out the refreshed template, and 3 weeks after that is the initial draft deadline set forth by OMB.

Opportunities

Ways we could consider improving the process or digging into further

Insight

Many of the performance coordinators edit for plain language.

Considerations and takeaways

Plain language is at the forefront of the performance coordinators minds when they are reviewing the decks. However, none of them stated that they use any readability tools to help with this editing besides what comes out of the box in Google Docs or Microsoft Word.

> I'm trying to get people to write in a more plain language style. Some people that are writing the docs are writing at a really high level, and I stress that the information needs to be understandable by the public.

> No plain language tools. I look at plain language notice that they have. We do have guidance on plain language that they use.

> I edit to make things clear, like clarifying acronyms.

Insight

Performance reviewers review content for accuracy and neutrality.

Considerations and takeaways

There is value in further explaining the review process in supplemental info on the website because there is a lot of effort in making these documents accurate and neutral.

> I had to learn to make sure the measure owners would not paint too rosy of a picture - we need to talk about what needs to be seen and needs to be known.

> It's okay for some things to NOT be fine. If you report accurately you can get the attention and resources you need for your program to do better.

> I lean toward neutrality without communicating a bias. I stick to the facts and data points.

Insight

Getting the reporting done on time is considered a key success metric.

Considerations and takeaways

The more we can empower authors, editors, and reviewers to enter and move their content through the process in a timely manner and support the communication of timelines, the less burdensome this process will become.

> Our biggest metric right now is, can we get the reporting done on time.

> A wish I have is for the powers that be to communicate to the goal teams about how important it is to submit the information in a timely manner.

> [Success to us looks like] an on-time release. We've had to delay releases by up to a week in the past.

Insight

Some aspirational goals for creators are to invite questions/comments from the public or garner press coverage.

Considerations and takeaways

Ensuring that there are share features for the individual pages, as well as possibly exploring a way to see how many times information is shared.

Folks also would like for there to be more press coverage related to progress on goals.

> We'd like outreach from people that do have an interest.

> We need to show teams the impact of them to encourage them to spend more time on content.

> Having [our goals] covered in the press.

Insight

There is a strong desire for more storytelling, but no one is sure exactly how to go about that.

Considerations and takeaways

This was prevalent with both the PMA team and with agency coordinators, and agency reporters also suggested that some OMB examiners are interested in this as well.

Consider how we might leverage existing data to drive holistic storytelling - rotating content blocks, factoid callouts, etc.

Some performance teams have challenges getting internal agency traction with their comms teams to publish news related to goal work.

> External partners have given feedback that they aren't good at storytelling. They get info from partners but it doesn't always show the impact.

> Teams are busy. The dilemma is asking for more of their time to tell the story if they're too busy and don't have time.

> A lot of challenges we run into are team leads trying to say we're gonna be nimble and adaptive when we need less of that and need a little more structure to allow us the time to make sure all the content is as good as it can be and we're not rushing things out.

Insight

The gap between due date and publication date creates a loss of momentum/excitement around the sharing of that information.

Considerations and takeaways

When a document is finally published, the performance teams are already focused on prepping the process for the next round of quarterly updates.

They aren't certain when the updates may be published, and when they are, they feel like old news.

Publishing a well-designed page rather than just a document they have already tired of reviewing might be more exciting and increase awareness/engagement.

> Even with the last-minute fire drills - content doesn't get posted for a while.

> It's hard to say, "This has been posted - if you want us to come to talk about results, etc." (it's from 2 quarters ago)

> Lose excitement and relevance of the published data [because it is so after the fact.]

Insight

Making narrative content simpler or understandable can be a challenge.

Considerations and takeaways

This can be a cause of a lot of back-and-forth. There is also a fear of making content too simplified that it loses nuance and accuracy.

> Hard to boil down big stories down to a simple story for people to understand.

> To write really effectively is much harder than writing a lot.

> Sometimes the narratives submitted include jargon that needs to be changed.

Insight

Performance reporting documents are manually created separately even when there is overlapping data, such as with the APGs and the APPR.

Considerations and takeaways

There is a future opportunity to optimize APG information and leverage it more automatically to help aid in the production of other performance reports that are now produced in silos.

> Financial reporting also includes performance. Strategic plan is aspirational, but the performance report is how they're actually doing.

> There was once an effort on "interoperability". Currently the data is siloed.

> We have a 60 day outlook of strategic plan, APP/APR, agency priority goals, strategic review, and enterprise risk management. This is so we can plan out the work.

Insight

Many people create supplemental documents or resources to the A-11 guidance.

Considerations and takeaways

A-11 is the established source of truth, but a lot of performance coordinators and leads are creating supplemental guidance in order to summarize and bottom-line-up-front (BLUF) A-11 info, address questions that came out of previous cycles, and to provide tips on general best practices.

> We boil down A-11 guidance so people don't have to read all of it.

> We did a workshop to help orient APGs to the process and structure. Workshop talked about refreshed templates, what APGs are, and provided resources for them to use.

> We try to take information that's out there and make it more digestible.

Insight

Kicking off an APG cycle is more involved for the goal teams than updating the quarterly goals.

Considerations and takeaways

There is a lot more coordination and collaboration defining and structuring the goals when a new cycle kicks off. That might not be something to bring into the system immediately.

However, when a new goal is created there will be more fields that will need to be initially populated, and then less fields will need to be updated each quarter.

> There is a lot of context setting, not just the legal reason but the reason that reason exists, to tell our story, be transparent, highlight our successes. Help people see how their work fits into it.

> OMB provides feedback that targets aren't aggressive enough, but teams don't have the authority to tell agencies how to spend their money.

> The wording in OMB circular is "ambitious and achievable," most agencies would err on the achievable side.

Insight

There is a desire for there to be more content related to how performance reporting actually works.

Considerations and takeaways

We know that one of the top hit pages on the current site is a blog post about how to do strategic planning. Agencies understand folks might not be familiar with performance-related terms, or how performance reporting processes are done.

There is a key opportunity to develop evergreen content related to the performance reporting piece and educational content. This sort of content will improve discoverability of the site at large, and once published, can build authority over time and serve as a resource to others.

> There should be more things that explain what the documents are. Ex; President's Management Agenda.

> People appreciate understanding the process in better detail. We don't want it to feel like a bureaucratic practice. It's important to express the goals of the work. I frame it as a way to get more money!

> Is there a macro thing you could do of how our APGs are chosen over time - I think that would be something neat that the public would like to know.

Insight

There is a desire for more guidance related to terms and definitions used in federal performance reporting so there can be more consistency.

Considerations and takeaways

Related to the desire for additional performance-related context on the public side, but this insight is speaking more to more standardization/guidelines related to how agencies talk about or report certain milestones and metrics.

Some agencies have very defined guidance they use internally, while others do not have performance-related guidance.

> The online performance appendix got the axe, but we continue to maintain it.

> We have definitions for APG terminology and who the contacts were for APG teams.

> Our PMDF - performance measure definition forms - lay out a whole description in all that is entailed in all these performance measures, what data is included, how it is being gathered.

Insight

Adding more written and visual storytelling is an aspirational goal teams have.

Considerations and takeaways

We may need to consider a digital asset manager integration (DAM), and ensure an easy input and/or upload experience, as well as guidance, for how users add graphics, imagery, and/or visualizations.

> The APG groups are encouraged to share interesting stories, because it might be more appealing or useful for the public. I think it would be good to personalize the stories.

> I know OMB has been encouraging depts. to tell more compelling stories with visuals or a compelling table or graph that tells the story of change through time. I'm starting to work with the bureaus on that.

> We encourage them to share additional pictures, but this hasn't taken root yet.

Insight

There is a desire to know if other agencies are talking about their programs, especially in APG docs.

Considerations and takeaways

Agencies who own certain programs want to be sure they know if other people talking about their programs. Tagging related agencies may be helpful in building that connection.

> When I am looking at other agency's APGs, one thing that's interesting is when they call out our agency's programs in their docs but we don't know about it. There's no link back.

> We would REALLY like to know if we are getting mentioned in other docs.

Insight

There isn't always a lot of organizational awareness around priority goals outside of performance-focused roles.

Considerations and takeaways

Agencies have varying levels of maturity related to this, but it was reported that folks outside of the performance community often aren't aware of APGs or reporting metrics. This can create a burden on onboarding new teams when they begin reporting on an APG for the first time, and it can also be disheartening to goal teams if there isn't higher level buy-in from an agency leadership perspective.

> Internal teams don't know what an APG is, so I am continually educating people to understand what an APG is and what information I need from them to report on it.

> For some offices, APGs are a totally new concept.

> The team has tried to communicate the overall value and importance of the reporting.

Insight

Having buy-in from senior agency leadership is important to the success and prioritization of performance reporting.

Considerations and takeaways

Ensuring teams are empowered by their leadership at an organizational level is critical to their success.

> Good engagement is coming from leadership being on board because of executive order being attached to what is required.

> It would help if heads of departments or leadership would focus on it too (importance of reporting.)

> One APG lead this cycle is a chief of staff, which gives them more of a global view.

Insight

There is an awareness that people aren't engaging with the reports as much as people would like.

Considerations and takeaways

As we begin to make changes to the experience, it will be important for coordinators to track and leverage analytics so they can have tangible metrics and understand how people are (or are not) interacting with their content.

> We're thinking about the user-friendliness of the info, and we wonder– are there many public people looking at this? File type adversely impacts how many people engage with it. We looked at the analytics.

> The analytics don't highlight anything good, so I think that they don't look.

> Information is buried. If stakeholders knew that analytics exist, it would be an interesting thing to see.

Insight

Some coordinators use their own templates to gather information, and then populate the template for their teams.

Considerations and takeaways

Depending on when we onboard users into a system, people can still leverage external templates if they want to but we should validate the data entry experience with all coordinators regardless.

> Templates are sent with previous information pre-populated, but they have the blank one available from the kickoff process if they need it.

> Every quarter there is a data task, I send a request for specific data, stakeholders compile that, I put it into a spreadsheet and send it forward.

Insight

There is an awareness that there is an opportunity to better leverage and optimize the data itself as well as the reporting process.

Considerations and takeaways

If we show that we are in fact providing the database and resource for the agencies, agencies will likely adopt this platform.

People also have a desire to automate their tasks and reduce duplicate information.

> There is potential for performance.gov to amalgamate the info across the government, it adds value in that way. But it's not tapping into that value right now.

> Resources are a challenge - we don't have funding for big databases that go across agencies.

> There are so many tables with repeat information across performance reports - I want us to automate that.

Insight

Not having track changes in PowerPoint causes challenges.

Considerations and takeaways

This causes a lot of formatting work - highlighting, unhighlighting, changing font colors etc. We know track changes are important, but this shows some of the additional review burden that is being placed on coordinators and reviewers.

> With the PowerPoint template, you can't use track changes, and that has resulted in some hiccups going back and forth.

> I can't track changes in Google Slides and that's a difficult part of it. Manually shows changes with a red font.

Insight

Who creates the charts in the current APG documents varies.

Considerations and takeaways

For the most part, goal teams seem to be generating the charts that are included in the APG reports in either their Word/Docs or Sheet/Excel application. Some coordinators do it for the teams.

> The goal teams are creating their own visualizations.

> It doesn't take a lot of time to update the charts, but we do understand a lot of eyes are on some of that data.

> I just receive the data and put them in an Excel spreadsheet and the PowerPoint chart is automatically generated.

Insight

Goal reporters can try to say less to reduce exposure, but coordinators help push for more robust reporting.

Considerations and takeaways

Given some risks and anxiety around how this information is presented, we want to ensure we are providing a system that has positive reinforcements, helpful microcopy and inline guidance, and more, to help users feel compelled to engage with the system.

> “If we say this to you, are you gonna hold us accountable and cash in receipts?” They wanna tell us the least when filling out the powerpoint templates.

> Teams don’t want to share their dirty laundry. “You don’t want to be fully transparent about all the things. You want to tell a story.”

> Try to tone down an “over-emphasis of success” or the “painting of a rosy picture.”

Insight

Knowing that the end-result is public-facing is a motivator for ensuring quality, as well as focusing on risk reduction and not accidentally sharing internal info.

Considerations and takeaways

Ensuring users know what will be going public and what will be internal will be important to enforcing in the system. It also ties to a desire for analytics, and for shepherding internal conversations.

> We do comms to staff - “this is one of the key ways we can tell a public story about your work.”

> You want to make sure the public can understand it, but you don’t want to ‘start a fire’ where there isn’t one. How can we show ‘a bit of smoke’ that includes a call to action, but without starting a whole fire?

Insight

Performance reporters and coordinators want more guidance from OMB on how to fill out the templates.

Considerations and takeaways

While agency teams want to own their processes, they also want more guidance and examples to reference in regards to what OMB wants this information to look like.

> It would be great for OMB to give us more guidance on the template and how teams should fill it out.

> I want any guidance around best practice sharing.

Insight

Performance reporters and coordinators want an easier way to manage their reporting content.

Considerations and takeaways

There is an openness to trying a new approach to this process even if there is change because there is an awareness that there is a better, easier way to manage this information.

> If there were a way to make the data input process easier, that would be amazing. If we could point them to a site, that would help with version control, especially with the joint APGs.

> The biggest thing [that would help me would be] a platform that can take that on, moving through different queues, approvals, set deadlines.

> If someone could just put the information into a dashboard on performance.gov and the audience could have the slide deck as backup, that might be more beneficial

Insight

Performance coordinators want to collaborate with and learn from each other.

Considerations and takeaways

Coordinators are very curious to learn what works well in other agencies, not just in how they report the data, but also in terms of how they activate their teams, their leadership, and the public.

> It'd be great to create more opportunities to develop synergy and collaboration points.

> Why not build a government-wide appreciation for performance management and elevating accomplishments.

Insight

Performance coordinators are interested in topic-based taxonomy, and taxonomy-driven navigation.

Considerations and takeaways

There would be a lot of support for more taxonomy driven pages and connections if we can define and facilitate that.

> I would be excited about a tagging function for performance.gov, allowing cross-government viewing for things with similar topics.

> There's a lot of great info on performace.gov but it's challenging for users to combine it in meaningful ways.

> I'd like to have a whole page dedicated to the drought, to put the agency's effort in the larger global or national crisis.

Threats

What we should stay aware of, but may be out of scope for us to solve

Insight

Using different systems creates review and workflow challenges.

Considerations and takeaways

Getting everyone into one system would streamline the review process and solidify governance structures, and would be extremely high-value in terms of making this process more consistent and efficient.

We know we can't change the agency stacks, but we can explore building a unifying system.

> No one way to chat, keep calendars, or collaborate on documents. We're working on developing a tool that would give them a way to collaborate and store documents through Microsoft Teams. The problem is they can't get OMB in the system.

> Pain point is that there's no consistent way to provide updates. Can be messy to clean up.

Insight

There is a perception that the process seems to change just enough that there needs to be relearning or re-educating each time.

Considerations and takeaways

Getting everyone into one system would streamline the review process and solidify governance structures, and would be extremely high-value in terms of making this process more consistent and efficient.

> Now that I've done it a full year, I'm pretty clear about the expectations, but they're always going to be revised.

> Each time process is just different enough to confuse stakeholders.

Insight

Turnover can add a lot of additional burden to teams.

Considerations and takeaways

Institutional knowledge sits with people not in widely accessible systems, there isn't always centralized processes or documentation, and people can be thrust into a role quickly. Especially important to stay ahead of when preparing for a presidential administration transition.

> How it really goes: there are delays and issues: employee turnover, haven't gotten proper clearance, bottlenecks with resources, etc

> I had to learn quickly, because of two previous turnovers.

User stories

User stories are a human-centered design and development technique that help us capture user needs.

The formula for writing a user story is usually as follows,

As a [user persona], I want [to perform this task or expect this behavior], so that I [can accomplish this goal or expect this outcome.]

User stories allow us to capture real user needs, so then development teams can stay agile while keeping the human needs at the center of all solutioning and possible implementation strategies.

For simplicity's sake we might assign one persona to a user story, but also know that serving that persona will also serve other users as well.

We will come back to the user stories throughout the implementation phase, and ask ourselves, are we meeting the needs of our users? Are we improving their experience?

The goal is for the answer to always be yes.

As an agency performance coordinator or performance lead,

I want...	So that...
To ensure that my APG or PMA content is shareable so that I can better understand how people are understanding or interacting with our content.	
Tools or guidance that can help me adhere to plain language standards so that I can be sure we are meeting those standards and retaining accuracy without oversimplifying.	
To better streamline how I capture performance information across my various documents in order to reduce burden and duplicate efforts.	
A place where I can share guidance with my teams in order to streamline communications and ensure they have the info they need to do what they need to do.	
To know what guidance other performance coordinators provide to their teams so that I may get some new ideas or leverage other tried and true processes without having to start from scratch.	
To know what guidance other performance coordinators provide to their teams so that I may get some new ideas or leverage other tried and true processes without having to start from scratch.	

As an agency performance coordinator or performance lead,

I want...	So that...
Email reminders to be automated so I don't have to manually remind my stakeholders and feel like I am annoying them.	
To ensure my reports are submitted in a timely manner so that my information can be published on time with everyone else's.	
My team to author and facilitate the review of our goal report info so that I can ensure that the proper context is included around the progress and data of the information.	
To convey certain things to leadership through the APG reporting process that are internal-only so that I can capture their attention when I have it and raise any high-level successes or concerns.	
A clear positioning statement about what performance.gov is as a product that I can share with my stakeholders and rally them behind.	
To see our goal updates get press coverage so that we can propel our impact and showcase the government's progress and the hard work of our teams.	
More visibility into the HQ-level timelines ASAP so that I can better prepare and activate my goal team reporters.	

As an agency performance coordinator or performance lead,

I want...	So that...
To know that my agency's programs are being referenced in other people's performance data so that I can connect with them, capture the info to share with our team, and see if there are any opportunities to collaborate.	
To understand how many people are looking at our content so that I can share that with my leadership and with goal reporting teams.	
To ensure we are fully leveraging the performance content we are providing in order to reduce duplicative work and decrease the burden on content creation.	
An easy way to show the changes that have been made so that I don't have to manually edit the text and then also change colors.	
More guidance from OMB related to best practices for authoring or determining milestones, so that I can share that with the goal reporting teams and reduce some back-and-forth that happens when we send something that is not aligned with their expectations.	
To be able to review the content just as OMB will see it so that I can ensure everything is presented as intended.	

As an agency performance coordinator or performance lead,

I want...	So that...
There to be a defined upstream and downstream workflow so there are no gaps in the review process and I don't have to reconcile unexpected information coming in at an unexpected time.	
A simple and streamlined system that collects my performance reporting data so that I can reduce some of the manual work that we are doing in the current reporting and review process.	
To see analytics related to how users are engaging with my content, so that I can share with leadership and other stakeholders invested in performance data.	
Additional guidance or support to help identify CTAs relevant to my APGs so that I can help invite action related to our goals.	
To have a better understanding of our target audiences and how to message them will help me provide better guidance to my team.	
To ensure I always am reviewing the most up-to-date information at any time so that I do not have to duplicate efforts or miss a critical update.	

As an agency performance reporter,

I want...	So that...
To see the information I previously submitted to help inform how I write the new narrative for my quarterly update.	
To be sure there is a way that the quarterly narrative or notes are retained in context with the data points so that the information does not stand alone and become vulnerable to misinterpretation.	
To see the readability level of the content I am writing or editing to reduce some of the back and forth.	
To easily generate charts that are accurate and look good so that my data is visualized and easy to understand.	
To produce the best performance report for public consumption so that people can understand how the government works	
Access to a knowledge base of information so that I can ensure I am following established processes and procedures and not reinventing the wheel.	
An efficient process to report performance data so that I can spend my time focused on the important work I am doing to accomplish our goals.	

As someone involved in the performance reporting process,

I want...	So that...
Not be able to edit certain information after publication in order to preserve the integrity of the data.	
Provide comments to elicit more thoughtful and nuanced narratives from the goal reporters so that we can be sure we are providing consistent and comprehensive reporting.	
Comment back and forth in a single system instead of having to leverage both the template's system comment section and email.	
Training and documentation on how to use a new system or process performance reporting so that I can know how to use the system efficiently and also train others as needed.	
Guidance baked in to the submission portal experience to help me as I learn and so I don't have to do a lot of searching to find the guidance I need.	
To add compelling visuals to my reports so that I can create engaging content and humanize the work being done.	
To communicate challenges or the need for more resources as part of the quarterly update process.	

As someone involved in the performance reporting process,

I want...

So that...

To connect the efforts I am working on to others working on similar efforts so that we can show all of the different ways we are working toward making progress on a topical goal.

To get our workflows and process knowledge out of email threads so that there is more visibility and there is not a knowledge gap when someone leaves.

To be sure that information that is intended for the public is published, and internal information not intended for the public is not accidentally published, so that I can reduce risk for my department/agency.

Focus on only the fields that need review/updates so that I don't have to read through a lot of information.

Be sure there is a way that the quarterly narrative or notes are retained in context with the data points so that the information does not stand alone and become vulnerable to misinterpretation.

As a performance.gov user,

I want...	So that...
To find all performance reports in one place so I don't have to hunt for related information across different sites and experiences.	
Provide comments to elicit more thoughtful and nuanced narratives from the goal reporters so that we can be sure we are providing consistent and comprehensive reporting.	
Comment back and forth in a single system instead of having to leverage both the template's system comment section and email.	
To better understand how the APG data is reviewed so that I can trust the data I am reading and understand how it has been validated.	
To be able to easily find the information I am looking for whether I am navigating through the site or using a search engine.	

What’s next

What is next

- UX design and engineering collaborate on final recommendations for a submission portal experience and front-end user experience
- Define minimum viable product (MVP) site launch strategy and post-MVP vision
- Define next steps in user and usability testing
- Continue to gather feedback, iterate, and improve on the federal performance reporting experience for all users

Thank you.