BUSINESS INTELLIGENCE FROM THE CENTER OF GOVERNMENT

Office of Shared Solutions and Performance Improvement

Supervised by Ivan Metzger - Program Manager

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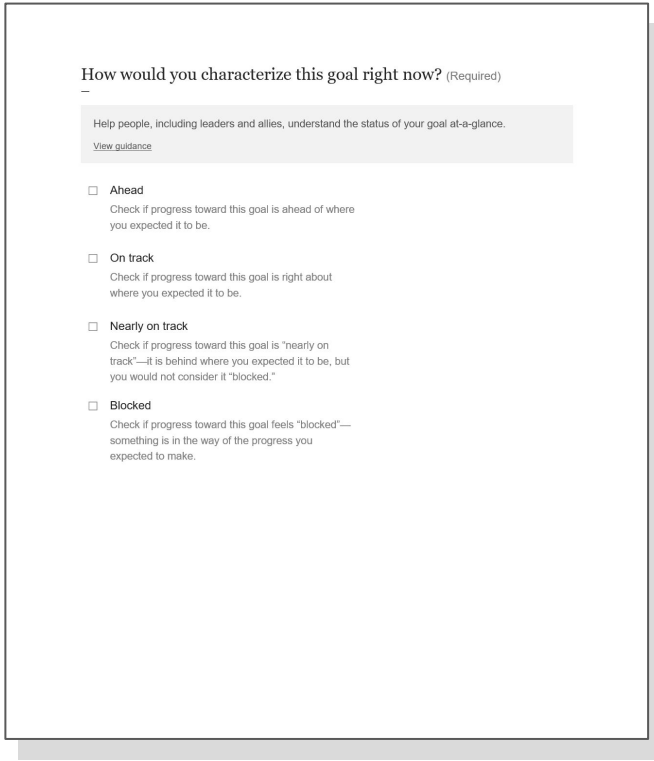
GSA

JASON D'AMICO
Union College
Computer Engineering

BACKGROUND

The cover sheet is a way to **collect more actionable information on the status of goal teams** and **make performance reporting data matter.**


How would you characterize this goal right now? (Required)

Help people, including leaders and allies, understand the status of your goal at-a-glance.

View guidance

- ☐ Ahead
  Check if progress toward this goal is ahead of where you expected it to be.
- ☐ On track
  Check if progress toward this goal is right about where you expected it to be.
- ☐ Nearly on track
  Check if progress toward this goal is "nearly on track"—it is behind where you expected it to be, but you would not consider it "blocked."
- ☐ Blocked
  Check if progress toward this goal feels "blocked"—something is in the way of the progress you expected to make.

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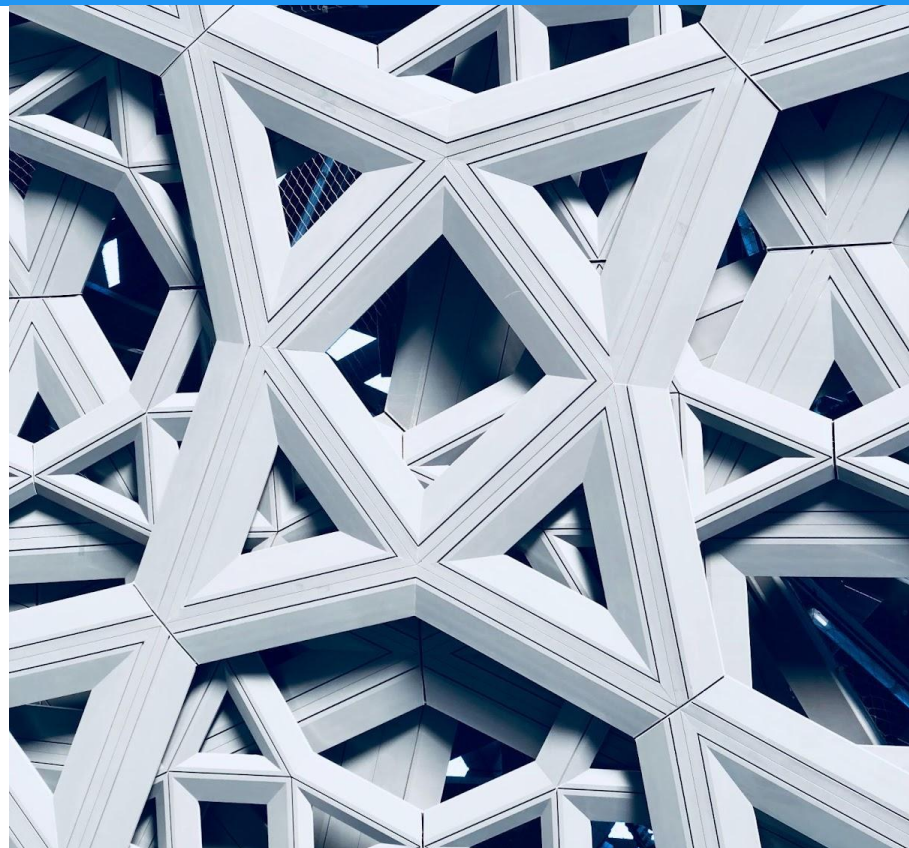
THE OPPORTUNITY

The cover sheet concept has buy in...but **how do we extract data from it and create insights from it?**

1. Extracting data from cover sheet
2. Dynamically filling output document
3. Leveraging performance information in a useful way

Can we prove that this works?



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GUIDING QUESTIONS

The following questions guided the output design:

- “What is the status of my agency’s strategic goals, as described by our goal teams?”
- “What challenges do my agency’s goal teams say they need help with?”
- “What does OMB recommend we do about some of those challenges?”
- “How have things changed?”
- “Based on our goals and challenges, who should we collaborate with more closely?”

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THE SOLUTION

We made decisions based on **modularity** and **convenience of stakeholders:**

- **Python** to extract data from cover sheets and store in centralized data source
- **Python** for running scripts succinctly and ease of interaction with data sources
- **Word document** as output for ease of circulation
- **Figma** to design output prior to automating it

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NO-CODE EDITING

Editing the output **without touching the code** was a key feature we implemented.

This way, the project can be adjusted to the liking of the stakeholders without extensive code knowledge.

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HOW WE DELIVERED

We delivered the following outcomes:

- Validated the process of extracting data from Word documents
- Created template Word documents that are dynamically populated
- Enabled no-code editing and easy addition of center of government suggestions
- Iterated on feedback from Pgov working group, team members
- Refined pipeline such that it can be used as the base of the final product
- **Proved that this this process can be automated and opened the door for deeper exploration**

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Toward the Future

THANK YOUS

Data pilot team:

- Ivan Metzger
- Elizabeth Keyes
- Andrew Terrell
- Suzann Slaunwhite

CIF:

- Rachel Dodell
- Ariana Soto
- Andy Green

User feedback:

- Lauren Stocker
- Cecilia Hernandez
- Trey Bradley
- Neil Miller
- Ken Ambrose
- Steven Lagan
- Beth Martin
- Basil White
- Aaron Eisenbarth

Whole OSSPI team!

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