



# **President's Management Advisory Board**

*Discussion Materials*

September 12, 2014



# Today's Agenda

## **9:00 a.m. to 10:30 a.m.**

- Subcommittee Dialogues (Closed Meetings)

## **10:30 a.m.**

- Convene Full PMAB Meeting (Open to the Public via Webcast)

## **10:30 a.m. to 10:45 a.m.**

- Update on the President's Management Agenda

## **10:45 a.m. to 11:00 a.m.**

- Remarks by Megan Smith, U.S. CTO

## **11:00 a.m. to 11:45 a.m.**

- Discussion on Implementing the Digital Services Strategy

## ***Break***

## **11:50 a.m. to 12:30 p.m.**

- Key Insights and Proposed Action Items from Subcommittee Dialogues

## ***Adjournment***



# **Update on the President's Management Agenda**

Beth Cobert

Deputy Director for Management, Office of Management and Budget



# President's Management Agenda

## *The Four Pillars and Specific Management Goals*

### **EFFECTIVENESS**

*Deliver smarter, better, faster service to citizens*

- Customer Service
- Smarter IT Delivery

### **EFFICIENCY**

*Maximize value of Federal spending*

- Benchmark and Improve Mission-Support Operations
- Strategic Sourcing
- Shared Services

### **ECONOMIC GROWTH**

*Support innovation, economic growth, and job creation*

- Open Data
- Lab-To-Market

### **PEOPLE & CULTURE**

*Deploy a world-class workforce and create a culture of excellence*

- Employee Engagement
- Senior Executive Leadership
- Recruiting and Hiring



# President's Management Agenda

## Focus on Effectiveness Goals

**EFFECTIVENESS**

EFFICIENCY

ECONOMIC GROWTH

PEOPLE & CULTURE

### Customer Service

*Goal Statement: Deliver world-class customer services to citizens by making it faster and easier for individuals and businesses to complete transactions and have a positive experience with government.*

#### Progress Update

- Established a Community of Practice with 15 agencies and held kick-off event
- Conducted research and outreach to develop proposals to increase collection of customer feedback and reward

#### Upcoming Milestones

- Compile list of top customer interactions in Federal government
- Develop scope and guiding principles for the Community of Practice
- Develop structure for customer service awards program

*Both topics featured in today's discussion*

### Smarter IT Delivery

*Goal Statement: Improve outcomes and customer satisfaction with Federal services through smarter IT delivery and stronger agency accountability for success.*

#### Progress Update

- As of May, 81% of IT projects within 10% of budgeted cost; 79% within 10% of delivery schedule
- U.S. Digital Service launched to improve digital interactions w/govt.
- *TechFAR Handbook* published to help agencies deliver digital services within acquisition rules

#### Upcoming Milestones

- Create new IT workforce training opportunities
- Leverage outcomes from PortfolioStat FY2014 sessions
- Launch pilot for agile contracting



# President's Management Agenda

## Focus on Efficiency Goals

EFFECTIVENESS

**EFFICIENCY**

ECONOMIC GROWTH

PEOPLE & CULTURE

### Benchmark and Improve Mission-Support Operations

*Goal Statement: Improve efficiency and increase adoption of effective management practices by establishing cost and quality benchmarks of mission-support functions.*

#### Progress Update

- 40 metrics – covering five mission-support functions – collected from and shared across all 24 CFO Act agencies and their major bureaus/components
- “Deep dive” meetings conducted with each agency’s leadership team to review results and develop action plans

#### Upcoming Milestones

- CxO Councils review benchmark results and identify areas for collective action
- Define quality metrics for Phase II, including customer satisfaction, service quality and error rates
- Build government-wide database providing access to data and reporting

### Strategic Sourcing

*Goal: Expand the use of high-quality and high-value strategic sourcing solutions to improve the government’s buying power and reduce contract duplication.*

#### Progress Update

- Janitorial and Sanitation strategic sourcing solution awarded
- MRO solution in progress

#### Upcoming Milestone

- Category Hallways launching soon – buyer’s guide for best practices, contracts, and pricing to deliver better value

### Shared Services

*Goal Statement: Strategically expanded high-quality, high-value shared services to improve performance and efficiency throughout government.*

#### Progress Update

- Awarded contract to develop Program Management Office with overarching governance structure for Financial Shared Services

#### Upcoming Milestones

- Define governance principles for financial management shared services
- Establish common performance metrics among shared service providers



# President's Management Agenda

## Focus on Economic Growth Goals

EFFECTIVENESS

EFFICIENCY

**ECONOMIC GROWTH**

PEOPLE & CULTURE

### Open Data

*Goal Statement: Fuel entrepreneurship and innovation in the wider economy while improving government efficiency and effectiveness by unlocking the value of Federal data.*

#### Progress Update

- Executive Order signed
- Open Data Policy and Action Plan published
- Open Data Dashboard launched
- Several events held to engage stakeholders

#### Upcoming Milestones

- Develop integrated dashboard for agency Key Performance Indicators
- Release 'Hacks, Jams and Paloozas' handbook for agencies
- Release and expand data identified through Action Plan

### Lab-To-Market

*Goal Statement: Increase the economic impact of Federally-funded R&D by accelerating and improving the transfer of new technologies from the lab to the commercial marketplace.*

#### Progress Update

- Announced upgrade to *data.gov/research* website to provide machine-readable data on over 700 Federal Research & Development facilities
- NIH/NSF released funding opportunity for pilot program with academics and researchers

#### Upcoming Milestones

- Collect best practices in tech transfer models, IP licensing programs and human capital strategies
- All agencies will make IP and R&D user facility data available in a machine-readable format on *data.gov*
- Finalize indicators to measure economic impact of new policies



# President's Management Agenda

## *Focus on People & Culture Goals*

EFFECTIVENESS

EFFICIENCY

ECONOMIC GROWTH

**PEOPLE & CULTURE**

### People and Culture

*Goal Statement: Innovate by unlocking the full potential of the workforce we have today and building the workforce we need for tomorrow.*

#### Progress Update

##### **Employee Engagement**

- Each agency identified 2-4 elements of employee engagement index for focus;
- Joint CHCO – Labor Management Council established on topic
- Pilots launched at 5 agencies to test new models for engagement

##### **Senior Executive Service (SES)**

- Gathered information on current SES onboarding practices
- Planned multi-disciplinary “thought leader” sessions on leadership
- Engaged agency COOs and CHCOs in developing pilots for SES recruitment, assessment, training

##### **Recruiting and Hiring**

- Held numerous interagency meetings to diagnose recruiting/hiring challenges and develop solutions
- Designed recruiting toolkit for agencies

#### Upcoming Milestones

##### **Employee Engagement**

- Leverage HR community to identify and disseminate effective engagement practices
- Provide guidance to agencies on including engagement goals in overall agency performance plans

##### **Senior Executive Service (SES)**

- Launch mentoring and coaching programs targeted at SES
- Implement new SES onboarding pilot at selected agencies
- Improve and streamline processes for recruiting and hiring SES

##### **Recruiting and Hiring**

- Hold first community of practice meeting to share info on hiring flexibilities with goal of expanding use across agencies
- Establish working group to partner with agencies on “untying knots” in the recruiting and hiring processes





# PMAB Initiatives

## Progress Highlights

Initiative	Goal	Challenges	Solutions/Achievements	Future Focus
<b>EFFECTIVENESS</b> <i>Smarter IT Delivery</i>	<p>Improve investment reviews and governance processes, and drive focus on customer service and user needs</p>	<ul style="list-style-type: none"> <li>• Frequent changes in leadership and regulation</li> <li>• Dispersed authority, control of budget, and control of project outcomes</li> </ul>	<ul style="list-style-type: none"> <li>• Completed PortfolioStat, annual IT portfolio review process conducted by all agencies</li> <li>• Launched the U.S. Digital Service</li> <li>• Launched Digital Services Playbook and TechFAR handbook</li> </ul>	<ul style="list-style-type: none"> <li>• Engage in agency pilots to test the USDS program</li> <li>• Scale the USDS, continue recruitment efforts;</li> <li>• Refine TechFAR and Digital Service Playbook by applying internal and external comments</li> </ul>
<b>EFFICIENCY</b> <i>Strategic Sourcing</i>	<p>Identify and advise agencies on industry best practices in the creation and operation of a strategic sourcing vehicle</p>	<ul style="list-style-type: none"> <li>• Data Collection</li> <li>• Incentives</li> <li>• User Behavior</li> <li>• Data Analysis</li> <li>• Contract Structure</li> </ul>	<ul style="list-style-type: none"> <li>• “Prices Paid” portal operational</li> <li>• Maintenance, Repair and Operations contract awarded</li> <li>• Appointed five new government-wide “category managers” for commonly purchased commodities</li> <li>• Stood up first government-wide PMO office for strategic sourcing (in GSA)</li> </ul>	<ul style="list-style-type: none"> <li>• Award 3<sup>rd</sup> generation of office supplies solution</li> <li>• Create online buyer’s guide and marketplace for three major areas of commonly purchased items – office supplies, software and IT hardware, to be led by the new government-wide commodity managers</li> <li>• Goal is to help agencies and contractors quickly find the best- in-class contracts, practices and pricing.</li> </ul>
<b>PEOPLE &amp; CULTURE</b> <i>SES Dev’t and Performance Management</i>	<p>Develop and deliver series of competency-based training modules to new SES; Design government-wide executive appraisal system</p>	<ul style="list-style-type: none"> <li>• Reduced training budgets</li> <li>• Inconsistent dev’t of SES across agencies</li> <li>• High/Low performers not adequately distinguished</li> </ul>	<p>Established SES Reform strategy focused on:</p> <ul style="list-style-type: none"> <li>• recruitment</li> <li>• accountability for hiring at senior levels</li> <li>• retention and development</li> <li>• addressing performance and conduct issues as they occur</li> </ul>	<ul style="list-style-type: none"> <li>• Pilot SES reforms with agencies</li> <li>• Roll out reforms government-wide by 2015.</li> </ul>



**Megan Smith**

U. S. Chief Technology Officer



# Discussion on Implementing the Digital Services Strategy

Beth Cobert

Deputy Director for Management, Office of Management and Budget

Steve VanRoekel

Federal Chief Information Officer, Office of Management and Budget

Mikey Dickerson

Administrator, U.S. Digital Service



## Improving the Digital Experience for Citizens and Businesses

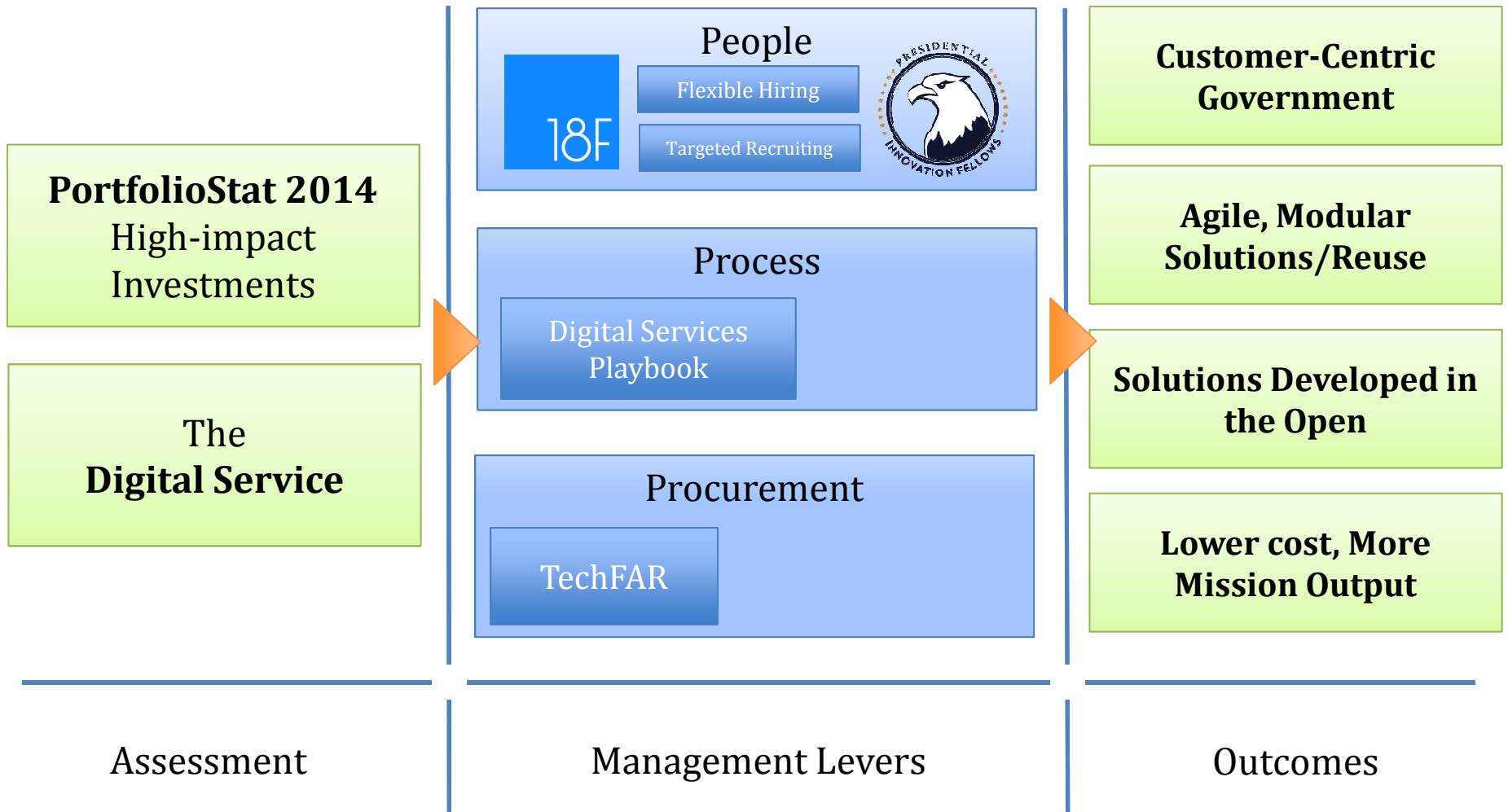
*The U.S. Digital Service launched in August with one core mission:  
To improve and simplify the digital experience that people and  
businesses have with their government*

A small team of digital experts, led by former Google systems engineer Mikey Dickerson, has been recruited to collaborate with agencies to:

- Make websites more consumer-friendly
- Identify and fix existing problems with digital services
- Help upgrade the government's technology infrastructure



# The Digital Service – An Essential Component of Smarter IT Delivery





## **Key Insights and Proposed Action Items from Subcommittee Dialogues**



# Subcommittee #1 Dialogue: *Transforming the Customer Service Model*

**Session Facilitators:** *Steve VanRoekel, Federal CIO, Office of Management and Budget*  
*Mikey Dickerson, Administrator of the U.S. Digital Service and Deputy Federal CIO*

## Key Issues

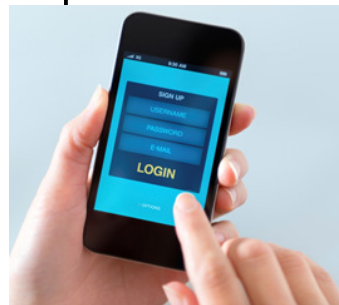
- Identifying the right feedback mechanisms for your customers
- Ensuring that “unvarnished” customer feedback reaches senior leaders and is incorporated into performance incentives
- Addressing customer privacy concerns
- Motivating customers to switch from in-person/phone-based to digital channels
- Defining principles for website design to maximize customer usability
- Leveraging user communities to help design on-line/mobile service models and interfaces
- Attracting tech talent from the private sector in a hot labor market



## Federal Feedback Button Concept

The subcommittee discussed a proposal for creating a tool to solicit, aggregate and analyze qualitative and quantitative customer service measurement across federal programs

- Consistently branded “Federal feedback button” pop-up on websites across government
- Designed to yield timely and actionable info for senior executives



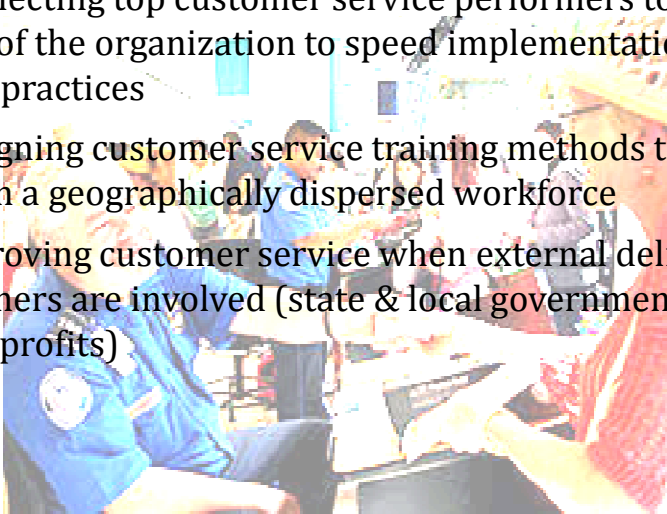


## Subcommittee #2 Dialogue: *Driving Change at the Front Lines*

**Session Facilitators:** *Beth Cobert, Deputy Director for Management, Office of Management and Budget  
Dustin Brown, Deputy Associate Director, Office of Performance and Personnel Management*

### Key Issues

- Balancing consistency and flexibility when setting organization-wide customer service standards
- Selecting customer service/satisfaction metrics to embed accountability and change behaviors among the front-line workforce
- Leveraging marketing strategies and public outreach to achieve customer service goals
- Connecting top customer service performers to the rest of the organization to speed implementation of best practices
- Designing customer service training methods to reach a geographically dispersed workforce
- Improving customer service when external delivery partners are involved (state & local governments, non-profits)



### Government-wide Customer Service Awards Program

The subcommittee discussed a proposal to establish a program to reward and recognize excellent customer service.

- Similar to the Clinton Administration's Hammer Award, which had widespread reach and is viewed as a successful model
- High-level recognition of awardees, including periodic White House involvement
- Allows for identification and replication of best practices







# Next Steps

- Ideas for follow-up actions from today's meeting?
  - Site visits
  - Conference calls
  - Deliverables
- Ideas for discussion topics at our next meeting on Friday Nov. 21?