AGA Research

PIO/CFO Summit Executive Summary

How Government is Patchworking Major Initiatives to Restore Trust in Government

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Acknowledgments

AGA is proud to recognize our Corporate Partner Advisory Group's (CPAG) Performance Improvement Committee for supporting this effort as well as the sponsors of the event that are listed on page 8.

Introduction

Agencies at every level of government use management initiatives, such as strategic planning, customer experience, and evidence-based policymaking, to drive priorities and reverse the steady decline in trust in government. That is the clear conclusion of performance improvement officers (PIO) and CFOs from both federal and state governments who participated in AGA's half-day PIO/CFO Summit in May 2022. The annual event convenes top officials from government performance and financial management communities to share what is working and how they are improving their organizations.

The 2022 summit gathered in the wake of a flood of initiatives aimed at addressing longstanding government management challenges. One of which is the *President's Management Agenda* (PMA), published last fall, which includes three key priorities:

1. Strengthening and empowering the federal workforce.
2. Delivering excellent, equitable and secure federal services and customer experience.
3. Managing the business of government.

Another initiative is a governmentwide effort to strengthen customer service in agencies that frequently interact with citizens and to target improvements in governments' responses to specific events that increase engagement with the public. Meanwhile, the "Year of Evidence for Action" was announced to fortify and expand evidence-based policymaking, while the U.S. Department of the Treasury (Treasury) updated its ambitious vision for advancing federal financial management into the future. Nevertheless, these measures represent but a sampling of what government is doing to mature its management, operations and reporting of results.

Summit participants explored numerous ways government executives are efficiently patchworking management initiatives into operations to address priorities. Treasury's Bureau of the Fiscal Service (Fiscal Service), for example, implemented customer experience initiatives to improve federal financial management, while the State of Tennessee relies on data analytics and evidence-based policymaking to improve budgeting. Summit speakers also shared examples of ways they met the challenges of the pandemic and economic crisis and the critical lessons learned for future crises about responding quickly yet responsibly.

Today, only about one-quarter of Americans say they can trust the federal government to do what is right "just about always" (2%) or "most of the time" (22%).[1] Speakers agreed that the government has great potential to regain citizens' confidence with specific actions, such as improving customer experience, reporting results with transparency, fighting fraud, and delivering on promises.

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1   Pew Research Center. *Survey of Public Trust in Government: 1958-2021*; https://www.pewresearch.org/politics/2021/05/17/public-trust-in-government-1958-2021/

Strategic Planning for Best Results

The summit took place soon after the publication of federal department and agency strategic plans. Pursuant to the Government Performance and Results Act Modernization Act, agencies are obligated to update their four-year strategic plans one year after each presidential inauguration. One panel focused on improvement processes in strategic planning and management in federal agencies. **Dustin Brown**, Deputy Assistant Director for Management, U.S. Office of Management & Budget (OMB), and **Jacki Ponti-Lazaruk**, Chief Innovation Officer, Rural Development, U.S Department of Agriculture, offered different perspectives on strategic planning and performance improvement for participants to consider.

The updated strategic plans help agencies drive important White House initiatives. For instance, a December 2021 executive order called for key agency service providers to improve service and connections with the public; agencies that carry out these customer service initiatives prominently included the directives in their strategic plans. The panel noted that these commitments are crucial since interactions with government agencies significantly affect a citizen's trust in government.

Brown emphasized the importance of agency culture in advancing evidence-based policymaking. He said OMB conducts regular strategic reviews with individual agencies to remind leaders that someone is paying attention who also expects accountability for bottom-line results that impact people's lives. "Routine drives culture," Brown added. Ponti-Lazaruk shared details about USDA's advancing maturity and their success in using an agencywide approach to strategic planning, enterprise risk management, and performance. She said building strong communication channels across the enterprise is critical to gaining support for the completion and implementation of an organization's strategic plan. While the plan lays the foundation for outcomes, it also drives management improvement priorities that are accomplished and sustained through regular reviews.

Evidence-based Policymaking: Who's Doing it Right?

In its annual *Invest in What Works Standards of Excellence* report for federal and state government agencies, Results for America assesses the infrastructure to include evidence and data in decision-making on budget, policy and management. Representatives of several agencies and states shared their best practices in these areas. The panel, moderated by Summit Consulting Director **Sarah Cunningham**, included:

- **Nichole Dunn**, Vice President and Federal Practice Lead, Results for America
- **Christin Lotz**, Director, Office of Evidence and Impact, Tennessee Department of Finance and Administration
- **Matthew Soldner**, Commissioner, National Center for Education Evaluation and Chief Evaluation Officer, U.S. Department of Education
- **Christina Yancey**, Chief Evaluation Officer, U.S. Department of Labor

Panelists shared their experiences and insights into building the infrastructure necessary for evidence-based policymaking — from getting started with "quick wins" that deliver value to stakeholders and demonstrate progress to securing buy-in, building trust, and leveraging agency learning agendas. Success strategies proposed by panelists included:

- building culture through intentional communication with front-line stakeholders and agency leadership.
- applying foundational fact-finding to customer experience to improve outcomes.
- recognizing that evidence-building doesn't always need to be complex. Agencies can start small with initiatives like simple A/B testing and move gradually into more complex evidence-building activities.
- engaging with HR and other support teams to hire and train for the right skill sets.
- keeping the human element front and center in program design and evaluation.

Participants lauded the American Rescue Plan for allowing state and local governments to use funding to build capacity and infrastructure for data collection and evidence-building.

OMB and the Office of Science and Technology Policy recently hosted the first-ever White House Summit on Evidence for Action and heralded the "Year of Evidence for Action." Participating agencies committed to sharing their leading practices; strengthening and developing new strategies and structures to promote consistent evidence-based decision-making; and increasing connections and collaboration with researchers, knowledge producers and decision-makers. The panelists, having demonstrated success in investing in what works, offered excellent templates to use in realizing the goal of this year.

The Integration of Performance and Financial Management

In efforts to improve performance and financial management in isolation, leaders often miss significant opportunities to enhance the government's cost effectiveness. For this reason, it was heartening for summit attendees to hear panelists discuss the ways they are integrating initiatives to achieve better outcomes at lower cost. The Fiscal Service set ambitious goals for the future of federal financial management; meanwhile, government's data transparency increases every year. Accurate and timely financial and other data are critical to advancing proven outcomes.

Panelists shared examples of transformative efforts in the effectiveness, efficiency and transparency of government operations. The panel, moderated by Guidehouse Director **Amber Heimberg**, included:

- **Dan Berger**, CFO and Assistant Commissioner, Treasury's Office of Management.
- **Jason Bossie**, Director Office of Program Performance, Analysis and Evaluation, Small Business Administration (SBA).
- **Corinna Turbes**, Policy Director, Data Foundation.

Bossie emphasized that getting a clean opinion, though a priority for SBA, is the minimum standard for confidence in financial data that is good for decision-making. He said financial data is critical to making sure taxpayers get "the biggest bang for their buck." He also explained SBA's condensed learning curve toward administering massive programs established in a short time and ways the agency found in the process to strengthen program integrity. He said they managed to reach applicants to reduce loan amounts and prevent fraud in the midst of a crisis that stretched agencies' capabilities.

Berger shared similar stories of the Fiscal Service's great challenges in response to demands of the pandemic and conveyed the importance Treasury has placed on modernizing federal financial management. Both he and Turbes emphasized the availability and increasing reliability of federal financial data today to use to improve government accountability and performance. The panelists agreed that the proliferation of available financial and administrative data means that evidence-based policymaking doesn't always require expensive, multi-year evaluations, but rather short-term, rapid experimentation, which often produces results quicker.

The PMA and Improving the Customer Experience

The PMA sets ambitious goals for strengthening the federal workforce, improving the customer experience, and better managing the business of government, including financial management. Top OMB and Treasury officials shared their thoughts on PMA initiatives and lessons learned toward achieving breakthroughs and improvements in performance and management. OMB Associate Director of Performance & Personnel Management **Pam Coleman** and Treasury's Fiscal Assistant Secretary **Dave Lebryk** presented an assessment of their efforts to solve some of the government's greatest long-standing challenges.

Coleman discussed the challenge of improving the "not optimum" federal hiring process in the midst of a national labor shortage. She said the customer- or employee-focused approach now used should improve recruitment and retention of talent, since the intersection of employee and customer experience initiatives is unmistakable.

Lebryk conveyed the importance of delivering on the promise of a better customer experience in government. The Fiscal Service, which regularly disburses trillions of dollars and engages millions of taxpayers, witnessed the magnification of this scale — in many cases overnight — as it responded to the combined pandemic and economic crises. Constant focus on improving the customer experience was necessary to deal with mushrooming demand, he noted.

Conclusion

Participants in AGA's PIO/CFO Summit confirmed that the governments throughout our nation, both federal and state, are not currently emerging from a crisis. Rather, they remain squarely in the midst of several crises involving health, finances and economics. Government agencies are helping citizens through the predicament by leveraging emerging management improvement initiatives, including the PMA. Their efforts not only help the nation respond to current emergencies but also learn ways to prepare for the next one. Success will depend on how well citizens hold agencies and programs accountable for their actions and improvements. Accountability will be measured by greater results and increasing trust in government. It's a tall order.

Resources

[The Pew Research Center's Survey on Public Trust in Government](#)

[The President's Management Agenda](#)

[Federal Financial Management Vision](#)

[Federal Financial Management Vision Progress Statement 2021](#)

[Fact Sheet: Year of Evidence for Action to Fortify and Expand Evidence-Based Policymaking](#)

[Fact Sheet: Putting the Public First: Improving Customer Experience and Service Delivery for the American People](#)

[Results for America's 2021 Invest in What Works Federal Standard of Excellence](#)

[Results for America's 2022 Invest in What Works State Standard of Excellence](#)

[Tennessee's Office of Evidence and Impact, Tennessee Department of Finance and Administration](#)

[Data Foundation's 2021 Chief Data Officer Survey Results: the Maturation of Data Governance in U.S. Federal Agencies](#)

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