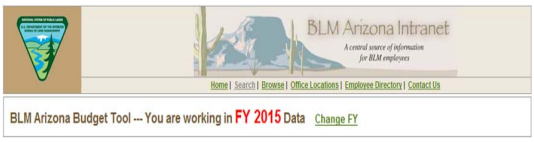
BLM AZ BUDGET TOOL

http://web.az.blm.gov/azbudget/planning/index.cfm



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WHY IS THIS TRAINING IMPORTANT?

- NEW functionality in the AZ Budget Tool
- This training video will provide users with in-depth knowledge and the ability to utilize this new upgrade to it's fullest extent.

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LESSON OBJECTIVES

- By the completion of this lesson and with the use of a computer, employees will be able to demonstrate the ability to:
  - Discuss Performance Data and how it is Measured
  - Explain where this data originates and how it can be compared to current Budget data within the Tool
  - Determine the best Parameters to be used to Generate the new Performance-Related Reports
  - Export reports to MS-Excel for further analysis

COURSE MAP

- Powerpoint Presentation
  - Provide Background Information about BLM Performance Data and the PMDS Database
  - Discuss PMDS data elements uploaded to the Tool
- Live Demo!
  - Demonstrate process for selecting Report Criteria
  - Demonstrate how to Execute Reports
  - Discuss the Review Process for these reports
  - Demonstrate exporting Reports to MS-Excel

BLM PERFORMANCE MEASURES GENERAL KNOWLEDGE

PERFORMANCE MEASURES
WORKLOAD MEASURES

- A segment of work within a strategic goal that provides measurable progress toward goal achievement.
- Provide a picture of the progress being made to reach specific goals, and they also point out areas where more effort may be needed
- The individual Performance Measures focus on Mission Area, Goals & Strategies and answer some basic performance questions about the overall work.

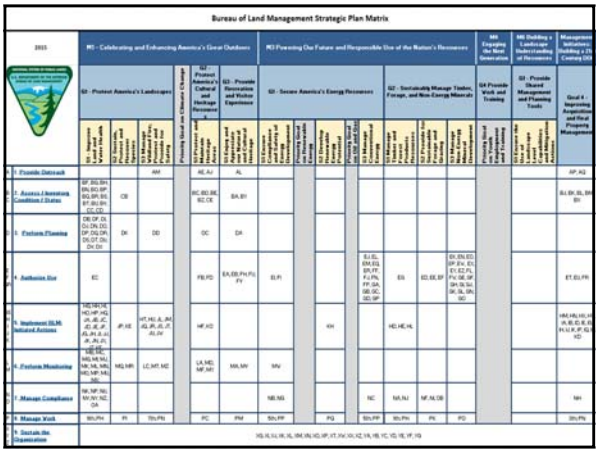
WORKLOAD TERMINOLOGY

- Functional Area / Subactivity
- Program Elements (PE)
- BLM Strategic Plan Matrix
- Mission Area / Goal / Strategy
- Target vs Actual
- Mid-Year “Adjustments”
- Third Quarter “Adjustments”

ACCOUNTING CODE COMPONENTS

http://abc.blm.gov

- Subactivity (SA) - A category defining a work process
  - L1020 = Rangeland Management
- Program Element (PE) – Record cost of work activities & outputs (Cost in FBMS & Outputs in PMDS)
  - BP = Access Watersheds (Acres)
- Functional Area – Combination of components used to track obligations & expenditures within the accounting system – Multiple “0000”s added …
- Example Functional Area - L10200000.BP0000



Bureau of Land Management Strategic Plan Matrix

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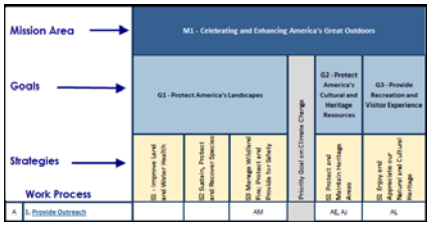
Workload Measures (Examples)



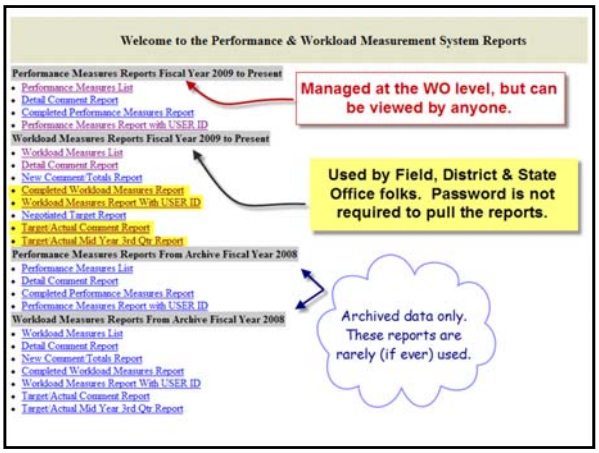
PE	Description	Unit of Measure
AM	Provide Rural Fire Community Assistance	Departments
AE	Heritage Resources Education and Outreach	Programs/Events Delivered
AJ	Conduct Native American Consultation	Consultations
AL	Provide Outreach Through Interpretation and Environmental Education	Programs/Events Delivered
AP	BLM Indian Lands Surveyors Consulting Services	Consultations
AQ	Boundary Standard Documents Produced	Certificates

FY16 PMDS Timeframes

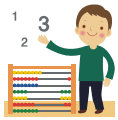
- Summer 2015 – Create Workload Targets in conjunction with the Planning Target Allocation (PTA)
  - District/Field Offices work with State Office/Program Leads to agree on Targets based on funding in PTA.
- Jan-Mar 2016 – Mid-Year Update component of PMDS Module open to enter accomplishments
  - Targets cannot be modified, but …
  - Updated accomplishment projection & provide justification in the comments section
  - Last Day to enter data under Mid-Year component Mar 31, 2016
  - Written Explanations for any targets with projected accomplishment of <90% or >110%

Timeframes (Cont)

- Apr-Jun 2016 – 3rd Qtr Update component of PMDS Module open to enter accomplishments
  - Same data can be adjusted as in Mid-Year component
  - Last Day to enter data under 3rd Qtr component June 30, 2016
  - Written Explanations - Projected accomplishment <90% or >110%
- Sept 25, 2016 – Last day for Field/District Offices to enter Actual accomplishments
- Sept 30, 2016 – Last day for State Office to enter accomplishments



EXAMPLES OF STATE OFFICE REVIEW



- The State Office uses all of the field data entered into PMDS to roll up into State performance accomplishment
  - Target, Mid-Year, 3rd Quarter, Actuals and Comments

- Comments are extremely important as they are used to explain
  - Shortfalls (<90%) or Overages (>110%)

At the local/District level and on the State report to WO

EXAMPLES OF STATE OFFICE REVIEW

- Layout Example – Each District/Division plus Statewide
  - PE, PE Name, WM, DD, Strategy Type & Orig/MY/3Q Targets
  - Actuals w/percentages … Current Range for each date
  - Comments

Func Area2	Name	Demand Driven	AZ Strategy Type	Orig Target	Target Adj Mid Year	Target Adj 3rd Qtr	Actual 2_24_2014 (40% FY)	%Tar 2_24_2014 (30-50%)	Actual 3_10_2014 (40% FY)	%Tar 3_10_2014 (30-50%)	Actual 3_24_2014 (40% FY)	%Tar 3_24_2014 (30-50%)	Actual 4_7_2014 (52% FY)	%Tar 4_7_2014	Comments
AE0000	Heritage Resources Education and Outreach (# of products delivered)	No	Strategic	36	36	0	0	16.67%	0	16.67%	7	19.44%	0	0.00%	
AJ0000	Consultations with Indian Tribes and Alaska Native Corp(# of consultations)	Yes	Must Do	34	34	0	1	2.94%	1	2.94%	1	2.94%	0	0.00%	
AL0000	Public Outreach Through Interpretation , Envir Educ(Programs/Events Deliv)	No	Strategic	221	221	0	28	12.67%	28	12.67%	80	36.20%	0	0.00%	
AM0000	Provide Community Assistance (Number of actions to assist communities)	No	As Funds Available	3	3	0	0	0.00%	0	0.00%	0	0.00%	0	0.00%	
BA0000	Recreation Resources Inventoried/Assessed (Acres)	No	As Funds Available	113,000	113,000	0	56,500	50.00%	56,500	50.00%	56,500	50.00%	0	0.00%	
BC0000	Acres of Heritage Resource Inventories (Acres)	No	Strategic	1,550	1,550	0	830	53.55%	830	53.55%	955	61.61%	0	0.00%	AZS010-L1050 250 ac in 1st qtr; balance in rest of qtrs
BE0000	Inventory for Wilderness Character(Acres)	No	Must Do	91,340	91,340	0	0	0.00%	0	0.00%	65,000	70.22%	0	0.00%	
BF0000	Assess Hazmat Sites(number)	Yes	Must Do	2	2	0	1	50.00%	1	50.00%	1	50.00%	0	0.00%	

PMDS DATA UPLOADED TO THE TOOL

- All uploaded data is keyed on the following fields to ensure relational integrity throughout the Tool
  - Cost Center (i.e. LLAZA00000)
  - FA Budget Activity (i.e. L1050 – 0000 removed by code)
  - Program Element - PE (i.e. AE – 0000 removed by code)
  - Therefore, LLAZA00000-L1050-AE widgets can be directly linked to LLAZA00000-L1050-AE funding, expenditures and all other aspects within the Tool.

Please feel free to review the relational database discussion in video #2 of this series, if desired

PMDS DATA UPLOADED (cont)

- There are 4 tables uploaded with a single Excel file
  - Actual Accomplishments (including date of current data)
  - Comments
  - Target, Mid-Year Target & 3rd Qtr Target
  - PMDS UserID and most recent Status Date
- Once the data is uploaded, the upload date will be shown on the Reports Screen

LIVE DEMONSTRATION

LOGIN PROCEDURES

MISCELLANEOUS UPGRADES

FUNDED VS. NON-FUNDED REQUIREMENTS

FUNDED VS NON-FUNDED REQUIREMENTS / TASKS

Additional Needs

~~Nice to Have~~

Must Have

UFRs

Make it STOP! … My Brain Hurts!!

"NON-FUNDED" DEFINITIONS

- Unfunded Requirements

Anticipated Costs that are not funded but are necessary for mission accomplishment.

- Additional Opportunities

Anticipated Costs that are also not funded but cover opportunities to complete additional mission-related work that is not necessarily mission-essential work.

Both of these apply to Labor and Ops Costs

CONCLUSION

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