

SECTION 85—PERFORMANCE METRICS (SCHEDULE V)

Table of Contents

- 85.1 Why is there a performance metrics schedule?
 85.2 What's the history of the performance metrics schedule?
 85.3 How will the performance metrics schedule work for the FY 2006 Budget?

Summary of Changes

OMB will complete this schedule using information that agencies provide in the Performance Assessment Rating Tool (PART). In completing their PART submissions, agencies and OMB will flag which metrics they want to publish in schedule V. OMB will use this flag to automatically copy metrics information from the PART database to schedule V.

Some accounts may not include a performance metrics schedule. First, some accounts may contain programs that have not yet been assessed using the PART. Second, some PART programs apply to more than one account in such a way that an informative presentation cannot be achieved. OMB may also choose not to show performance metrics in a given account for other programmatic reasons.

The schedule will not use line numbers to link performance metrics to specific program activities in the program and financing (P&F) schedule. The metrics will only relate to the account as a whole.

85.1 Why is there a performance metrics schedule?

The performance metrics schedule provides a uniform but flexible structure for the Budget Appendix to show a sampling of key metrics that illustrate what each account accomplishes with the funding it receives. The new schedule is designed to link budget and performance information with the formal reporting structure used by the Appropriations Committees, and to begin to integrate the PART into the architecture of OMB and agency budget formulation and execution systems.

Traditionally, budget schedules focus largely on inputs, i.e., resources that come into an account. We show these resources in a number of ways. For example, the P&F schedule shows obligations, budget authority, and balances of budget authority. A different schedule, the personnel summary, shows the number of Federal FTEs who are paid from that account. A third schedule, the object class, delves into obligations, showing which obligations are associated with travel, training, rental payments, personnel, or a number of other categories.

The performance metric schedule differs from other schedules by showing a sample of what the account accomplishes with the money it receives. The schedule will show key metrics, not everything the account produces. The types of metrics that demonstrate what the account produces typically include outcomes, outputs, or efficiency measures. A list of examples culled from last year's PARTs is available at <http://www.whitehouse.gov/omb/part/index.html>.

85.2 What's the history of the performance metrics schedule?

In the FY 2003 and 2004 Budgets, some agencies used informational tables to show performance metrics for some of their accounts in the *Appendix*. These metrics typically included outputs or efficiency

measures. Performance metrics added a new dimension to the *Appendix*, but they failed to tell a complete story, as they did not include related cost information. In addition, even informed readers could not necessarily identify links between performance metrics and cost information in other budget schedules, particularly the program activities in the P&F schedule.

As an upgrade to the informational tables used to show performance metrics in the FY 2003 and 2004 Budgets, the FY 2005 Budget included a schedule to show these metrics. The primary reason for using a formal schedule, rather than informational tables, was to provide a more uniform framework to display performance metrics. In addition, using a formal schedule was intended to allow agencies to associate metrics for the account as a whole, or for detailed program activities described in the P&F Schedule.

Agencies were encouraged, but not required, to show performance metrics for accounts in the FY 2005 Budget. Due to the complexity of the requirement, few agencies reported performance metrics.

85.3 How will the performance metrics schedule work for the FY 2006 Budget?

For the FY 2006 Budget, schedule V will show a small number of performance metrics in those budget accounts with programs that have been assessed with the PART. ([Section 26.3](#) includes instructions for providing a list of budget accounts for PART programs.)

For programs first assessed or reassessed for the 2006 Budget, agencies and OMB will identify which metrics they want to show in the FY 2006 Budget in the PART worksheet; to do this, enter a "v" into column L of the Measures tab for the Measure and the 2004, 2005 and 2006 targets. It is likely that the performance measures selected for schedule V will be the same ones chosen for inclusion in the PART summary since those are generally the measures that are most representative of the program's performance. OMB will automatically copy the indicated performance metrics from the PART database to schedule V so agencies do not need to re-key this information. To ensure that the PART database and schedule V remain in sync, agencies and OMB will not be able to update the performance metrics in schedule V; they will need to do so through the PART worksheet.

For programs that were assessed in previous years (and not reassessed for the 2006 Budget), OMB and agencies will follow a similar process described in [section 26.3](#).

You will be able to see (but not update) a draft schedule V using the MAX A-11 data entry system. The draft will show all measures that have been tagged for inclusion in schedule V. OMB may remove some entries from schedule V as the database is being updated to ensure that the overall presentation is well balanced and informative.

In some cases, programs assessed using the PART is funded from more than one account. In these cases, OMB will work to develop an informative presentation, such as showing the performance metrics with the account that provides the predominant amount of funding and including an explanatory footnote. If an informative presentation cannot be developed, that account may not have a schedule V. In addition, OMB may also choose not to show performance metrics in a given account for other programmatic reasons.