

SECTION 210 – PUBLIC REPORTING

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Summary of Changes

Provides updated guidance on expectations of agencies related to Federal Program Inventory reporting, and clarifies the FPI's relationship within the broader context of agencies' performance and strategic planning and management processes. Technical edits are made to existing guidance on the timing of performance plans and reports during an election year. Updates clarify the Content table and standard information elements that must be addressed when writing Strategic Plans, Annual Performance Plans, and Annual Performance Reports, including thematic tagging for strategic objectives and priority goals. New guidance is also provided to agencies for how to address elements related to evidence-building and evaluation plans required by the [Foundations for Evidence-based Policymaking Act of 2018](#) in the agency SP, APP, and APR.

PUBLIC REPORTING AND PERFORMANCE.GOV

210.1 To which agencies does this section apply?

This section applies to all agencies, as defined in the GPRA Modernization Act of 2010. This fiscal year:

- Agencies that were required to identify Agency Priority Goals (large, CFO Act agencies) will develop performance information for Performance.gov this year, and must follow all sections of this guidance.
- All other agencies (non-CFO Act agencies) subject to the GPRA Modernization Act of 2010 that were not required to establish Agency Priority Goals are required to follow all sections except [210.11](#) through [210.14](#).

210.2 What is the purpose of this section?

This section provides information on publishing performance information through a central website, as required by the GPRA Modernization Act of 2010. The GPRA Modernization Act of 2010 requires:

- Availability of an agency Strategic Plan, Annual Performance Plan and Report, and performance updates through a central, Government-wide website.
- Quarterly updates via a central, Government-wide website on Agency Priority Goals and Cross-Agency Priority Goals.
- Availability of information on programs and management initiatives identified by agencies or the Administration on a central website.

OMB's approach to managing Performance.gov:

- Allows agencies to focus limited resources on the implementation of strategic plans, strategic reviews, and efforts to achieve progress on Priority Goals;
- Maintains effective, efficient, and transparent ways to report agency performance information;

- Maintains cross-agency collaboration via the Performance Management Line of Business (PMLOB) with the General Services Administration.

210.3 What is the purpose of Performance.gov?

[Performance.gov](https://www.performance.gov) is a website that serves as the public window into Federal agencies' efforts to deliver a smarter, leaner, and more effective government. The site informs the public of the progress underway to cut waste, streamline government, and improve performance through consolidating performance and strategic planning and reporting of the Federal Government's goals and updates of performance progress in key, priority management areas of focus. Performance.gov is the performance website required under the GPRA Modernization Act of 2010.

A centralized website makes information about Federal cross-agency and agency-specific goals and performance of priorities and initiatives easier for the public, Congress, delivery partners, agency employees, and other stakeholders to find. It also supports coordination and decision-making to advance shared goals. Through this central website, agencies also publish other required agency information, such as program information, within the Federal context of agency missions, goals, and performance management.

210.4 How does a Presidential transition year affect the timing of agency performance plans, reports, and other information that is included on Performance.gov?

The performance planning and reporting cycle for most years strongly encourages agencies to consolidate their Annual Performance Plan with their Annual Performance Report (see section [240.23](#)). However, consistent with the intent of the GPRA Modernization Act to align strategic and performance planning to election cycles, in the event that a Presidential election leads to a change in Administration agencies should separate the reporting of performance under the outgoing Administration from the planning to be conducted by the incoming Administration. Specifically, agencies should:

- Publish the APR and final reports for Agency Priority Goals (APGs) prior to the transition to the new Administration.
- Publish the APP with the first full President's Budget of the new Administration.

Agencies must still produce and submit to OMB their draft APP and APR documents for review, collaboration, and deliberation through the Budget process that begins each September following the timelines established in section [200](#).

210.5 What information is available on Performance.gov?

Pursuant to the GPRA Modernization Act of 2010, Performance.gov includes information on the Cross-Agency Priority (CAP) Goals, Agency Priority Goals (APGs), Agency Strategic Plans, Annual Performance Plans, and Annual Performance Reports. The site consolidates and centralizes strategic and performance plans and reports for both large CFO-Act agencies in addition to other, non-CFO Act agencies. Beginning with the release of the FYs 2022-2026 Agency Strategic Plan in February, 2022, the site will also display agency strategic objectives and priority goals topically organized by theme (i.e., National Defense, International Affairs, Transportation, General Government, etc.), enabling visitors to search strategic objectives and priority goals by both agency and theme. Other organizational management and planning documents, such as Annual Evaluation Plans, are also included on Performance.gov. The content table in this section ([210.21](#)) identifies the specific content and data / informational elements required for plans and reports published by agencies and made available through Performance.gov.

210.6 How do agencies ensure their strategic and performance plans and reports are made available on Performance.gov, and communicate their publication status to OMB?

Federal agencies should produce their Strategic Plans, Annual Performance Plans, Annual Evaluation Plans, and Annual Performance Reports in PDF format using their existing processes and publication procedures. Once cleared, agencies shall make these plans and reports available on their individual agency website per section [210.7](#), as well as provide a hyperlink for display on Performance.gov by emailing OMB's Performance Team at performance@omb.eop.gov. This hyperlink will link to the agency's public website where the agency has published current and past performance plans and reports. The email to OMB by the agency PIO or designee will also serve as notification of the plan/report's publication.

210.7 How are agency-specific plans and reports made available to the public on the agency's website?

To enhance transparency of performance data, all Federal agencies should make information, including prior plans and reports, as easy as possible to locate from the agency's individual website (e.g., www.usda.gov). Federal Agencies must also provide a hyperlink on Performance.gov to the agency's public website (e.g., <https://www.usda.gov/our-agency/about-usda/performance>) where the agency has published current and past performance plans and reports. In adherence to OMB Memorandum [M-17-06](#), agencies must create a prominent link directly to their performance plans and reports from their "About Agency" or "About Us" page, which is directly off of the agency's homepage.

Agencies may also want to create links from this page to other planning and performance reporting documents, such as the human capital operating plans, information resources management plans, Annual Evaluation Plans, Agency Financial Reports or Performance and Accountability Reports, Congressional Budget Justifications, and other acquisition or capital asset management plans where those other documents are publicly available and relevant to performance on strategic objectives. Agency performance planning and reporting documents available on the agency website should be consistent with Administration policies and not include pre-decisional information.

When developing performance information for publication, agencies should be open, transparent, and accountable for results of progress against stated performance goals and objectives, publishing information online consistent with the Federal Records Act, privacy and security restrictions, and other applicable law and policy including [OMB Circular No. A-130](#), Managing Information as a Strategic Resource. It is important that agencies communicate relevant, reliable, and timely performance information within and outside their organizations to improve performance outcomes and operational efficiency.

Machine-readable. Consistent with the GPRA Modernization Act of 2010, information published through Performance.gov will be made available to the public in a machine-readable format. See section [240](#) for additional information on an initiative to make agency performance plans and reports 'machine readable' with the 2021 Budget and Performance Planning / Reporting cycle.

210.8 When will Performance.gov updates be published this year?

Agencies should reference the timeline with approximate publication updates provided in section [200](#).

210.9 May agencies publish their performance plans and reports in print?

Agencies should not incur expenses for the printing of the agency Strategic Plan, Annual Performance Plan or Annual Performance Report for release external to the agency, except when providing such documents

to Congress, if Congress specifically requests a printed report. In these cases, agencies are encouraged to consider printing a copy of the electronically-published plan or report or leverage internal agency printing capabilities if already existent, rather than creating a special, professionally bound version which can be more expensive. Each agency will publish agency-specific plans and reports electronically on the agency's website and must ensure the content is consistent with information published on Performance.gov.

However, an agency may use information from the Strategic Plan, Annual Performance Plans or Annual Performance Reports to develop printed material about the agency for stakeholders or delivery partners if there is a mission-advancing reason to do so and where the estimated benefits of such publication outweigh the estimated cost. Agencies are strongly encouraged to develop such materials electronically instead of printing when electronic distribution is possible and should develop printed materials only for targeted use.

210.10 Will agencies be required to update performance information on Performance.gov more frequently than annually?

Agencies that establish Agency Priority Goals on Performance.gov will continue to update information on a quarterly basis on Performance.gov until the end of the performance cycle, when they will be archived and remain available to the public. For any agency with lagging data related to APGs, the archived goals will remain open until such time that lagging data are available and updated. For the final quarterly update of any APG implementation and reporting cycle (e.g., FYs 2018-2019; FYs 2020-2021), agencies will follow the usual quarterly updating process and include an overall assessment of goal progress relative to the goal's impact statement. This summary of performance will help the public, delivery partners, and other stakeholders understand performance achievements in accordance with the goal target(s). Agencies that contribute to the accomplishment of Cross-Agency Priority Goals developed by the current Administration will also report more frequently than annually, as coordinated by the Goal Leader, the Performance Improvement Council, and OMB.

FEDERAL PROGRAM INVENTORY

210.11 What is the Federal Program Inventory (FPI) and to which agencies does it apply?

A central listing of programs or program activities that are aggregated, disaggregated, or consolidated to be considered a program by the agency. The inventory is a list of programs that are a mutually exclusive and collectively exhaustive illustration of the activities undertaken by the Federal Government. The inventory is a tool for strategic decision-making across the agency and government as a whole, which provides an opportunity to facilitate coordination across programs by making it easier to find programs that may contribute to a shared goal, improve public understanding about how Federal programs link to budget, spending, performance, and other information. Congress recognized the importance of program inventories when it passed the GPRA Modernization Act of 2010 (see 31 U.S.C. 1122), requiring such information be presented in a way that presents a coherent picture of Federal programs, activities, and the performance of the Federal Government and individual agencies consistent with guidance provide by OMB. OMB manages the Federal Program Inventory with the goal of improving its usefulness to support decision-making by continuously exploring new ways to leverage data as a strategic asset, and to make the inventory more transparent to the public.

The FPI applies to all agencies as defined in the GPRA Modernization Act of 2010 (see section [200.1](#) for details); however, OMB's current implementation focus is primarily on the program inventories of the large, CFO-Act agencies to enable coherent linkages between Performance.gov and agency financial data on USASpending.gov.

210.12 For the purposes of implementing program reporting required by the Federal Program Inventory (FPI), what is a program and how often must agencies certify their program activities?

Beginning with the 2021 Budget cycle, agencies' Program Activity(ies), as defined in [31 U.S.C. 1115\(h\)\(11\)](#), will be used for implementing the program reporting requirements of the FPI. This approach to program reporting reflects an effort by OMB and agencies to merge, where overlapping intent exists, implementation of reporting requirements of the Digital Accountability and Transparency Act (DATA Act) of 2014 with that of the GPRA Modernization Act of 2010. Such an approach also avoids duplicative efforts while minimizing reporting burden on agencies in order to provide a more coherent picture of Federal programs, activities, and spending.

For purposes of fulfilling this requirement through DATA Act reporting, it is the responsibility of Agencies to certify to their program activities on a monthly or quarterly basis, as appropriate and detailed in OMB Memorandum M-20-21, *Implementation Guidance for Supplemental Funding Provided in Response to Coronavirus Disease 2019 (COVID-19)*. Beginning in FY2022, all DATA Act reporting agencies must certify and update their program activities on a monthly basis.

210.13 Where can I access information related to the FPI?

The initial Federal Program Inventory was published in 2013 on the now [archived performance.gov](#) website, and remains available to agencies for reference purposes on the MAX Community Page established to generate the [2013 FPI](#).

In 2014, Congress passed the DATA Act requiring new public reporting requirements. In May 2017, agencies began reporting spending information in a structured information architecture format on [USASpending.gov](#). This includes complete inventories of Federal spending by Budget Function, Object Class, Treasury Account, Program Activity, and Catalog of Federal Domestic Assistance Listing, with each of these inventories connected to contract and financial assistance awards and subawards. To avoid duplicative efforts and minimize reporting burden on agencies, information on [USASpending.gov](#) represents the most comprehensive and regularly updated inventory of Federal programs, and fulfills an intent of the GPRA Modernization Act of 2010 provisions regarding the FPI.

Identification of agency programs can also be found in agency strategic and performance plans which show the alignment of programs to agency strategic objectives and performance goals. Agency strategic and performance plans are available on [Performance.gov](#).

210.14 What are the expectations and responsibilities of agencies related to FPI reporting, and how does the FPI relate to the broader performance and management efforts of agencies?

As established above, agencies meet the intent of the FPI program reporting requirements through their DATA Act reporting of program activities, and associated information (see sections [210.11](#) and [210.12](#)). As part of the agency's congressional justifications, program activities are the primary organization and structure by which the budgetary resources needed for fulfilling the program goals and outcomes are requested. However, while program activities offer a structure for organizing funding requests, the organizational performance and management principles advanced by the GPRA Modernization Act's strategic and performance planning are strategic and priority-goal oriented, aligned to the policy priorities of current Administration and agency leadership. Agency strategic and performance plans then represent the organizational management documents that are the outcomes of effective management routines to articulate the agency's mission, goals, priorities, and bring a unity of action and coordination of resources, activities, and efforts to achieve strategic objectives and priority goals through effective implementation

strategies. When viewed more holistically through an integrated, systems view of organizational management which connects agency budget planning with strategic and performance planning, agency strategic and performance plans can also provide a useful organizing structure by demonstrating the programs and program activities which contribute to strategic goals and objectives. In this systems-view, the program activity then is a key organizing component that connects budget and funding requests as part of a coordinated strategies for achieving goals and objectives in the agency Strategic Plan. It is in this context then that agencies must incorporate into their existing strategic and performance planning processes considerations of how the organization of spending (i.e., program activities) is linked to and connected with performance; that is, a planning approach that views programs and program activities as critical components of the implementation strategies embedded in agency strategic and performance plans, and which serve to focus resources, activities, and organizations in order to achieve progress against the strategic plan, strategic objectives, and agencies priority goals and initiatives (see section [230.9](#)). Such a planning approach also reinforces the Federal Performance Framework's focus as a management system which coordinates and aligns a broader complement of financial and programmatic data to enable improved decision making, accountability, and transparency of the Federal Government.

ELIMINATION OF UNNECESSARY AGENCY PLANS AND REPORTS

210.15 What does the GPRA Modernization Act require with regard to the elimination of unnecessary agency reporting to Congress?

The GPRA Modernization Act of 2010 requires that based on guidance provided by the Director of the Office of Management and Budget, the Chief Operating Officer at each agency shall, annually:

1. Compile a list that identifies all plans and reports the agency produces for Congress, in accordance with statutory requirements or as directed in congressional reports (the full list should be readily available to OMB and Congress upon request);
2. Analyze the list compiled to identify which plans and reports are outdated or duplicative of other required plans and reports, and refine the list to include only the plans and reports identified to be outdated or duplicative;
3. Consult with the congressional committees that receive the agency-proposed outdated or duplicative plans and reports to determine whether they could be eliminated or consolidated with other plans and reports; and
4. Provide a total count of plans and reports compiled and the list of outdated and duplicative reports identified to the Director of the Office of Management and Budget.

210.16 What information must agencies provide to OMB, if the agency has modification proposals for Congress?

Agencies are required as a part of their Fall, 2020 budget submission (FY 2022 Budget) to update their list of unnecessary reports. In updating their list of unnecessary reports to be proposed for modification concurrent with the FY 2022 Budget, agencies should examine the complete list of all plans and reports the agency produces for Congress (see section [210.15](#)) to determine those that may be identified as outdated or duplicative. Previous report modification proposals submitted to OMB that remain unacted upon by the Congress provide a useful starting point to inform the initial development of agencies' current year submission, though should not constitute the agencies' sole analysis in compiling this year's list.

Concurrent with the September Budget submission, agencies will be required to provide OMB with the following information on each congressionally-required plan or report modification proposal:

- Title of plan or report used by the agency when providing the report to Congress;
- Statute (or other congressional requirement citation) which mandates the agency to create the report and deliver it to Congress or the public;
- To whom it is delivered in Congress;
- How frequently it is delivered to Congress;
- Proposed recommendation for modifying: elimination, consolidation, streamlining or reduced frequency;
- Brief rationale, (e.g., duplicative, outdated, cost exceeds benefit, or other);
- Justification for rationale that clearly explains why the report was identified as duplicative, outdated, or otherwise in need of modification and is appropriate for publication;
- Hyperlinks or copies of reports that are being proposed for modification or elimination;
- Hyperlinks or copies of reports that are associated with the report being proposed for modification, such as a report that justifies that another plan or report is duplicative or a report with which content could be streamlined, for example; and
- A total count of all the plans and reports produced for Congress in accordance with statutory requirements or as directed in congressional reports.

210.17 What kind of agency reports should be proposed?

Agencies should include agency-specific plans and reports that are usually reoccurring in nature, rather than one-time reporting requirements. Generally, agencies should not include plans and reports that are required government-wide by all agencies (e.g., strategic plans) among the modification or elimination proposals; however, OMB will consider recommendations submitted from agencies for streamlining such government-wide documents. In vetting proposals before providing them to OMB, agencies' analysis must consider legislation or appropriations language that may have eliminated the reporting requirements they are recommending for modification, such as the Federal Reports Elimination and Sunset Act of 1995, [Public Law 104-66](#). Agencies should not put forth report modification proposals that have already been acted upon to be eliminated or modified; doing so calls into question the management processes and analyses used to inform the agencies' revised listing submitted to OMB, and potentially delays review and publication.

210.18 How will agencies provide the information to OMB?

Agencies must follow two steps for submitting proposals to OMB, with detailed instructions and templates for current year submissions posted on OMB's Performance Portal at the MAX Community Instructions page for the [Elimination of Unnecessary Agency Reporting](#) exercise designed to reduce agency reporting burden.

1. Modification proposals will be identified to OMB via a MAX Collect Exercise available to agencies on MAX Community on the [Elimination of Unnecessary Agency Reporting](#) page.
2. The point of contact who is assigned by the COO to coordinate the agency's submission must email official notification to performance@omb.eop.gov that the COO has approved the agency's submission by including the following:
 - A confirmation that the agency's proposed list of modifications to agency reports on the agency's MAX Collect Performance Portal submission page was validated by the agency and approved by the COO;
 - An agency email address to which public inquiries may be directed on the proposed list; and;
 - A notification as to when the agency consulted Congress on the agency's proposals.

210.19 What if our agency has few congressional reporting requirements or no new proposals since the last time we submitted information to OMB?

When requested, the agency should review the complete list of all plans and reports the agency produces for Congress to determine those that may be identified as outdated or duplicative, in addition to reviewing the previously-published modification list that is pre-populated in MAX to identify any plans and reports that have been eliminated or modified by Congress. The agency must remove modification proposals that have been addressed and acted on by Congress. The agency may choose to resubmit proposals that have not yet been addressed.

If the agency has no new proposals, the agency point of contact who is assigned by the COO to coordinate the agency submission must notify the OMB at performance@omb.eop.gov that the agency Chief Operating Officer has confirmed that the previously-published list has been updated in MAX Collect as needed, and has approved no new modification proposals since the last time the agency provided a list to OMB.

210.20 Are agencies required to submit legislation?

Any modifications of plans or reports that are required by appropriations legislation must be reflected in appropriations language modifications prepared for the purposes of publication of the President's Budget. For all other modification proposals required by other congressional actions, agencies are encouraged to identify legislative vehicles that provide the opportunity to pursue legislation (or other congressional approval as required) on their list of modification proposals as appropriate; however, agencies are not required to do so.

CONTENT TABLE FOR ORGANIZING STRATEGIC PLANS, ANNUAL PERFORMANCE PLANS, AND ANNUAL PERFORMANCE REPORTS

210.21 What information and content must agencies include when writing their Strategic Plans, Annual Performance Plans, and Annual Performance Reports for publication?

Agency Strategic Plans (SP), Annual Performance Plans (APP), Annual Performance Reports (APR), and Evidence Act deliverables are required to include common data and information elements when writing these plans. The table below establishes the common data and information elements, along with a detailed

description of each element, that agencies must address and incorporate when writing and assembling agency Strategic Plans (SP), Annual Performance Plans (APP), Annual Performance Reports (APR) and Quarterly Performance Updates (QPU). Agencies are responsible for ensuring performance plans and reports posted to the agency website and made available to Performance.gov are 508 compliant. For more information see <http://www.section508.gov/>.

Section Heading	Agency Plan or Report?
1. Agency and Mission Information	SP/APP/APR
2. Cross-Agency Priority Goals	SP/APP/QPU
3. Strategic Goals	SP/APP/APR
4. Strategic Objectives	SP/APP/APR
5. Agency Priority Goals	SP/APP/APR/QPU
6. Performance Goals	SP/APP/APR
7. Other Indicators	APP/APR
8. Evidence Act Deliverables	SP/AEP
9. Other Information (evaluations, hyperlinks, data quality, etc)	SP/APP/APR

Content	Plan / Report
1.0 Agency and Mission Information	
<i>1.1 Overview.</i> High level summary of the agency, which may include a description of core functions, organizational size, and key legislative authorities or initiatives. In order to illustrate the organization’s scope of responsibilities, the agency may include key data and narrative describing the number and kinds of people or businesses served, locations or characteristics of operation, and problems and opportunities addressed.	SP / APP / APR
<i>1.2 Mission Statement.</i> The mission statement should be a brief, easy-to-understand narrative, usually no more than a sentence long. It defines the basic purpose of the agency and is consistent with the agency’s core programs and activities expressed within the broad context of national problems, needs, or challenges. Mission statements enable the employees of an agency to see how their work contributes to the broader mission. Some agencies may also choose to include the mission statements of their major bureaus or components.	SP / APP / APR
<i>1.3 Vision and Values.</i> Some agencies opt to include vision or values statements. A strategic planning best practice, the vision statement articulates an agency’s desired future state in terms of strategic direction, expressing what the organization wants to achieve while generating momentum for action on the part of the agency to accomplish the vision. The values statement(s)	Optional (<i>strongly encouraged</i>)

Content	Plan / Report
<p>articulate the beliefs that undergird the organization’s culture or framework for decision-making. On Performance.gov, the vision and values may be included in the overview section.</p>	
<p><i>1.4 Organizational Structure.</i> Include information about the structure of the agency such as an organization chart that shows the agency components, bureaus or offices and how they are related. Agencies may choose to discuss any intra-agency efforts to work across organizations or programs in this section as well.</p>	APP / APR
<p><i>1.5 Stakeholder Engagement.</i> Summarize the agency's outreach strategy to its various stakeholders, including any relevant congressional engagement. The agency should also include a description of how the agency incorporates views obtained through congressional consultations into its Strategic Plan or Agency Priority Goals. Where appropriate, the agency should describe goal-specific input from congressional consultation and how it was incorporated in this section of the Strategic Plan and/or the “Overview” section for the Agency Priority Goals.</p>	SP
<p>2.0 Cross-Agency Priority Goals</p>	
<p><i>2.1 Cross-Agency Priority Goals.</i> An agency that contributes to Cross-Agency Priority Goals must address this responsibility in the agency’s plans and reports by including a list of Cross Agency Priority Goals to which the agency contributes and explaining the agency’s contribution to the CAP goals. (See 8.1 Major Management Priorities and Challenges for details.) The management section may be used to direct the reader to the section of the APP/APR which addresses CAP Goals.</p> <p>In addition, the SP/APP/APR should direct the public to Performance.gov. To do so, agencies should include the following language: “<i>Per the GPR Modernization Act requirement to address Cross-Agency Priority Goals in the agency strategic plan, the annual performance plan, and the annual performance report please refer to www.Performance.gov for the agency’s contributions to those goals and progress, where applicable. The [Department or agency] currently contributes to the following CAP Goals: [add list here].</i>” The Goal Leader, the PIC and OMB will coordinate quarterly updates to the website which will reflect the overall action plan and will describe how the agency’s goals and objectives contribute to the Cross-Agency Priority Goal.</p>	SP / APP / APR
<p><i>2.2 Progress Updates for Cross-Agency Priority Goals.</i> Agencies that contribute to Cross-Agency Priority Goals will continue to provide their information directly to Goal Leaders, OMB, corresponding government-wide (CXO) council, and PIC upon request in order to provide data for the purpose of updating Performance.gov.</p>	Performance.gov
<p>3.0 Strategic Goals</p>	

Content	Plan / Report
<p><i>3.1 Strategic Goals.</i> Each agency must establish general, outcome-oriented, long-term goals for the major functions and operations of the agency. The strategic goal should address the broader impact that is desired by the organization.</p> <ul style="list-style-type: none"> • <u>SP</u> – Identify the strategic goals. • <u>APP</u> – Include the strategic goals to frame the discussion of plans related to the strategic objectives, performance goals, APGs and other indicators. • <u>APR</u> – Include the strategic goals to provide context for the prior year’s progress made on strategic objectives, performance goals, APGs and other indicators. 	SP / APP / APR
<p><i>3.2 Strategic Goal Overview.</i> In identifying each strategic goal, the agency should briefly describe the following in a level of detail appropriate for a long-term plan:</p> <ul style="list-style-type: none"> • The opportunity or problem being addressed by the strategic goal. This brief explanation could include demographic, geographic information, risks or other characteristics that inform priority setting and identification of causal factors (e.g., weather) that influence outcomes. • Why the goals were selected including relevant background on the underlying reason for choosing each strategic goal, such as the problems necessitating the goal, opportunities being pursued, legislative mandates, and Presidential directives. 	SP
<p>4.0 Strategic Objectives (Includes Mission, Management, Crosscutting and other objectives. See sections 200 and 230 for definitions and expanded discussion).</p>	
<p><i>4.1 Strategic Objective.</i> Strategic objectives reflect the mission, service or stewardship outcome or impact the agency is trying to achieve and generally include the agency’s role. Strategic Objectives are tied to a set of performance goals and indicators established to help the agency monitor and understand progress against the Objective. Strategic objectives serve as the primary unit of analysis for agency and OMB assessment of how the agency is achieving its mission. Strategic objectives can support the agency in managing across goals and priority policy areas contributing to common outcomes.</p>	SP / APP / APR
<p><i>4.2 Strategic Objective Overview.</i> In discussing each strategic objective, the agency should briefly describe the following in a level of detail appropriate for the long-term plan:</p> <ul style="list-style-type: none"> • The opportunity or problem being addressed by the strategic objective and characteristics of the problem or opportunity, such as size and location. 	SP

Content	Plan / Report
<ul style="list-style-type: none"> Why the objective was selected. 	
<p><i>4.3 Strategies for Objectives.</i></p> <ul style="list-style-type: none"> <u>SP</u> – Strategies generally reflect the unity of action and coherent coordination of resources, activities, personnel, and operational efforts for achieving Objectives. Strategies detailed in the SP for achieving Strategic Objectives should include a description of how programs and program activities, operational processes, human capital, training, skills, technology, information, data assets, and other resources that are critical to mission delivery are organized in a coherent and coordinated manner to achieve outcomes articulated by the Strategic Objectives. Strategies should also generally describe the agency actions planned to make progress on Strategic Objectives, such as analysis of outliers, promising practices, and process improvement reforms. Key external or environmental factors should also be identified and incorporated agencies Strategies, including risks that could significantly affect the achievement of its objectives, distinguishing those beyond its control and those it seeks to influence. See 230.9. <u>APP</u> – Identify how the agency will track progress on each objective using performance and other indicators. Identify external factors that may have influenced the agency’s progress on objectives in the past fiscal year. As new strategies are established in the annual performance plan, the agency should consider external factors. 	SP / APP
<p><i>4.4 Strategic Objective Theme.</i> For each Strategic Objective, agencies must identify a theme(s) that reflects the objective’s major purpose and outcome by topical categorization.</p>	SP / Performance.gov
<p><i>4.5 Contributing Programs and/or Program Activities for Strategic Objectives.</i> Programs and program activities are often viewed as the principal structure for organizing the funding requests, efforts, actions, and personnel for achieving the common purpose and goals of the program or program activity. In this context, programs and program activities then are the key organizing component that connects budget and funding requests with strategic and performance planning as part of a coordinated strategies for achieving strategic goals and objectives. Agencies then must clearly identify the programs and program activities that contribute to each strategic objective in order to strengthen and reinforce the soundness of their implementation strategies for objectives. As appropriate, agencies must also identify the organizations, regulations, tax expenditures, program activities, policies, and other activities that contribute to each objective, both within and external to the agency.</p>	SP
<p><i>4.6 Progress Update for Strategic Objectives.</i> Each agency must include a brief narrative describing the achievements during the last fiscal year on the</p>	APR

Content	Plan / Report
<p>strategic objective, indicating where progress was made and where it was not, with an explanation of what worked and what did not. Challenges encountered during the last year should be described, along with plans or proposed actions for overcoming them where applicable. An identification of the agency’s progress as either noteworthy or requiring focused improvement must be included in the narrative, with further explanation for the reasons for the characterization of progress. (See section 260 for details on characterizing progress and required language.) An agency may summarize progress made on performance goals or other indicators, but need not discuss each of them. An agency may also discuss trends, causal factors, promising practices, and findings from evaluations or independent assessments. To keep the progress update brief, the agency should use hyperlinks or citations to supporting evidence, instead of including all the detail within the progress update.</p>	
<p><i>4.7 Next Steps for Strategic Objectives.</i> Each agency will summarize plans to make progress on strategic objectives for the next year, including prospects and strategies for performance improvement, and must include key milestones with planned completion dates. If a finding in the strategic reviews notes there is not enough evidence, describe evaluations or other studies planned as appropriate. Where possible the agency may describe plans to continue or expand what is working, develop or experiment to find promising practices, test the most promising practices to see if they can be replicated and validated, find or develop increasingly effective and cost-effective approaches, identify causal factors the Government can influence, and facilitate learning across delivery units.</p>	APP
<p><i>4.8 Goal Leaders and/or Lead Office for Strategic Objectives.</i> Each strategic objective shall have a Goal Leader(s) and/or Lead Office or Bureau/Component designated to oversee the implementation and execution of strategies necessary for goal achievement. Agencies will identify the agency official’s title and the organization responsible for the achievement of each strategic objective, or Lead Office designated.</p>	SP / APP
<p>5.0 Agency Priority Goals (APGs)</p>	
<p><i>5.1 APG Statement.</i> Each agency must identify which performance goals are Agency Priority Goals, if applicable (see section 250).</p> <ul style="list-style-type: none"> • <u>SP</u> – agencies required to set APGs should reflect the relationship to the strategic objectives identified in the agency strategic plan and published on Performance.gov. • <u>APP</u> – include the FYs 2020-2021 goal statements published on Performance.gov. • <u>APR</u> – as applicable include the FYs 2020-2021 goal statements published on Performance.gov. 	SP / APP / APR

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<p>5.2 <i>APG Goal Leaders</i>. Identify the title, organization and name of the agency official who is responsible for the achievement of each APG.</p>	<p>Performance.gov (Optional for APP/APR)</p>
<p>5.3 <i>APG Overview</i>. Includes the problem opportunity being addressed by the APG, relationship to agency strategic goals and objectives, key barriers and challenges. An agency should highlight congressional input, if such input was relevant to setting a specific goal where appropriate.</p>	<p>Performance.gov (Optional for APP/APR)</p>
<p>5.4 <i>APG Goal Structure and Strategies</i>. Each agency will summarize the APG Action Plan’s leadership, implementation team, goal structure, and implementation strategies. As new strategies are established, the agency should take into consideration external factors it can influence and those it cannot. An agency should identify key factors external to the agency that significantly affect the achievement of its Agency Priority Goal, including those beyond its control.</p>	<p>Performance.gov (Optional for APP)</p>
<p>5.5 <i>APG Indicators and Milestones</i>. Each APG is tracked through a suite of performance goals, indicators, and milestones. An agency should publish targets and actual results for each reporting period across the suite of indicators and milestones developed for tracking goal progress.</p>	<p>Performance.gov (Optional for APP/APR)</p>
<p>5.6 <i>APG Progress Update</i>. Each agency will include a brief explanation of achievements during the last quarter on Performance.gov (or, for the last quarter of the year, a brief summary of accomplishments over the last fiscal year in the APR), as well as an identification of significant challenges if any impeded progress on the APG. Because of their ambitious nature, all APGs face some risks with regard to the stretch targets set; therefore, agencies should include a description of significant risks of not achieving the planned level of performance, as appropriate.</p>	<p>Performance.gov / APR</p>
<p>5.7 <i>APG Next Steps</i>. Each agency will summarize how it plans to improve progress, including prospects and strategies for performance improvement, and will include key milestones with planned completion dates for the remainder of the goal period.</p>	<p>Performance.gov (Optional for APP)</p>
<p>5.8 <i>APG Theme</i>. For each APG, agencies must identify a theme(s) that reflects the goal’s major purpose and outcome by topical categorization.</p>	<p>Performance.gov (Optional for APP)</p>
<p>5.9 <i>APG Contributing Programs and/or Program Activities</i>. Programs and program activities are often viewed as the principal structure for organizing the funding requests, efforts, actions, and personnel for achieving the common purpose and goals of the program or program activity, and which in turn, contribute to and support broader organizational goals and objectives in the agency strategic and performance plans. In this context, programs and program activities then are the key organizing component that connects budget and funding requests with strategic and performance planning as part of a coordinated strategies for achieving strategic goals and objectives.</p>	<p>Performance.gov (Optional for APP)</p>

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<p>Agencies then must identify the programs that contribute to each Agency Priority Goal. As appropriate, agencies must also identify the organizations, regulations, tax expenditures, program activities, policies, and other activities that contribute to each Agency Priority Goal, both within and external to the agency.</p>	
<p><i>5.10 APG Data Accuracy and Reliability.</i> Agencies must include as applicable a brief discussion on the sources of data for the portfolio of key performance measures, indicators described above, quality of performance data and means used to verify and validate the data, any limitations to the data, and actions taken to mitigate data limitations. Agencies may also wish to provide more in depth discussions on methodology and data sources, which may also be inserted here, or choose to reference/link to more detailed discussions of data verification, validation, accuracy, reliability that are contained in latter sections of the APP.</p>	<p>Performance.gov (Optional for APP)</p>
<p>6.0 Performance Goals</p>	
<p><i>6.1 Performance Goal.</i></p> <ul style="list-style-type: none"> • <u>SP</u> – For each strategic objective included in the Strategic Plan, the agency will identify a limited number of examples of long-term performance goals. Details on long-term and annual performance goals need not be provided in the strategic plan, but instead should be included in the Annual Performance Plan and Annual Performance Report. • <u>APP</u> – The agency must establish performance goals, aligned to the agency’s objectives from the strategic plan, that contain a performance indicator, target and timeframe to define the level of performance to be achieved during the fiscal year in which the performance plan is submitted and the next fiscal year. Agencies should highlight if a performance goal addresses an agency major management challenge. Agencies may establish performance goals required by E.O. or OMB guidance and memoranda here, or in section 8 of this table below. • <u>APR</u> – The agency reports on progress made on performance goals. 	<p>SP / APP / APR</p>
<p><i>6.2 Actual Results.</i> For all performance goals, performance indicators should compare actual performance with target levels of performance at least for the prior year and clarify if the target was met or not. For performance goals specified in an alternative form, the results will be described in relation to such specifications.</p> <ul style="list-style-type: none"> • <u>APP</u> – the agency displays target data for every performance indicator for the current fiscal year and budget year in which the APP is being submitted in order to enable reporting of actual data in the APR upon the conclusion of the performance reporting period. 	<p>APP / APR</p>

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<ul style="list-style-type: none"> • <u>APR</u> – the agency displays actual results for performance indicators for at least the five preceding fiscal years, if available. Where useful, present trend data from its earliest point available even if the agency is publishing the performance indicator for the first time. It can, for example, be illuminating to show long-term trends, starting before a preventative government action was started, if the problem being addressed has since greatly diminished. Agencies do not need to present historic targets. 	
<p><i>6.3 Performance Targets.</i> For each performance goal, the agency should establish targets for the current and upcoming fiscal year.</p>	APP
<p><i>6.4 Performance Information Gaps.</i> Identify where actual information for performance goals is missing, incomplete, preliminary, or estimated. Indicate the date when the actual information will be available.</p>	APR
<p><i>6.5 Performance Goal Progress Update.</i> Each agency will briefly explain the causes of variance or change in trends for the performance indicators, as well as whether or not the target was met. The agency may identify successful or promising practices relative to agency performance goals. The agency may describe where mid-year budget changes or delayed appropriations affected the agency’s targets or achievement of targets previously established for the full performance year. Where the agency is not making sufficient progress in meeting a performance goal, the agency will briefly address future improvement including why the performance goal was not met and plans for achieving it. If the performance goal is determined to be impractical or infeasible the agency should address in the explanation and plan why that is the case and what action is recommended</p>	APR
<p><i>6.6 Changed Performance Goals and Indicators.</i> Identify performance goals changed or dropped since publication of the Annual Performance Plan, as well as changed or dropped performance measures, and the reasons for the changes. Such changes should be approved in consultation with OMB.</p>	APR
<p>7.0 Other Indicators</p>	
<p><i>7.1 Other Indicators.</i> Other indicators that do not have targets may, and in some cases, must be established to help explain agency performance. The agency should identify the indicator and explain why it is being used.</p>	APP / APR
<p><i>7.2 Other Indicator Actuals.</i></p> <ul style="list-style-type: none"> • <u>APP</u> – the agency displays actual data for every indicator for the past year and two additional preceding years where available. • <u>APR</u> – the agency displays actual results for at least the five preceding fiscal years, if available, and explains key results. 	APP / APR

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<p><i>7.3 Other Indicator Information Gaps.</i> Identify where actual information is missing, incomplete, preliminary, or estimated. Indicate the date when the actual information will be available.</p>	APP / APR
8.0 Evidence Act Deliverables	
<p><i>8.1 Learning Agenda.</i> Per the Evidence Act, agencies are required to include a multi-year Learning Agenda as part of their strategic plan. The Learning Agenda is a systematic plan for identifying and addressing policy questions relevant to the programs, policies, and regulations of the agency. While agencies may include components of their Learning Agenda throughout the Strategic Plan (e.g., priority questions), the Learning Agenda must be a separate section, chapter, or appendix within the Strategic Plan. If an agency chooses to include the Learning Agenda as an appendix, the contents of the Learning Agenda must be summarized in the body of the Strategic Plan. Additional information about the requirements of the Learning Agenda is included in section 290.</p>	SP
<p><i>8.2 Capacity Assessment.</i> Per the Evidence Act, agencies are required to submit an assessment of the coverage, quality, methods, effectiveness, and independence of the statistics, evaluation, research and analysis efforts of the agency, as part of the Agency Strategic Plan. This assessment, known as the Capacity Assessment, must be a separate section, chapter, or appendix within the Strategic Plan. If an agency chooses to include the Capacity Assessment as an appendix, the contents of the Capacity Assessment must be summarized in the body of the Strategic Plan. Additional information about the requirements of the Capacity Assessment is included in section 290.</p>	SP
<p><i>8.3 Annual Evaluation Plan.</i> Agencies must submit an Annual Evaluation Plan in conjunction with the Annual Performance Plan that describes the evaluation activities the agency plans to conduct during the fiscal year following the year in which the annual evaluation plan is submitted. The Annual Evaluation Plan is a <u>standalone document</u> and must be published on the agency’s website. Additional information about the requirements of the Annual Evaluation Plan is included in section 290.</p>	AEP
9.0 Other Information	
<p><i>9.1 Major Management Priorities and Challenges.</i> If not integrated elsewhere within the agency’s discussion of strategic and performance goals and objectives in the strategic or performance plans and reports, a summary section should be included that describes or cross-reference the agency’s efforts to deliver greater impact through innovation, increasing effectiveness and efficiency, and better customer service along with the agency official (title and office) responsible. Where a separate section of the plan or report is provided, this section should also highlight major management challenges—management and programmatic issues and risks or areas that may have greater vulnerability to waste, fraud, abuse, and mismanagement (such as issues</p>	SP / APP / APR

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<p>identified by the GAO as high risk or issues identified by an Inspector General) or where a failure to perform could seriously affect the agency’s mission delivery and ability to achieve its goals. This summary section should also be used to reference where management priorities and challenges are addressed throughout the plan or report, as well as if an agency has determined they do not have major management challenges.</p> <ul style="list-style-type: none">• <u>SP</u> – establish stewardship objective(s) (see section 230).• <u>APP</u> – identify planned actions to address major management challenges or priorities; performance goals, indicators and/or milestones used to measure progress for the management challenges or priorities determined by the agency; and the agency official (title and office) responsible for resolving such challenges. Examples of management priorities and challenges that may be identified in this section, where not aligned to the discussion or identification of separate performance goals elsewhere in the APP, include:<ul style="list-style-type: none">○ Major management challenges and risks, including those on the GAO High-Risk List, or those areas identified by the IG and published in section 3/4 of the AFR/PAR.○ Stewardship objectives, if identified in the strategic plan.○ Agency-specific contributions to government-wide management initiatives, such as priorities or performance goals established through Executive Order or OMB Memoranda in specific management or policy areas, to include:<ul style="list-style-type: none">• E.O. 13807, which requires agencies with environmental review, authorization, or consultation responsibilities to establish performance goals related to the completion of environmental reviews and authorizations for infrastructure projects consistent with the Modernize Infrastructure Permitting CAP Goal; and• OMB Memorandum M-17-23, which requires agencies to establish performance goals and associated indicators related to regulatory reform accountability under E.O. 13777.○ Contribution to Cross-Agency Priority Goals. For example:<ul style="list-style-type: none">• Agency efforts in the area of Category Management to increase spend under management and use of “Best In Class” contracts for common goods and services pursuant to the goals outlined in the PMA, and initiatives to control spending by better managing demand and consumption. Agencies should navigate to Category Management’s MAX page for more specific agency reporting requirements.• Key areas for innovation and improvements in customer service (see section 280).	

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<ul style="list-style-type: none"> • <u>APR</u> – describe progress made on management priorities and challenges that had been described in the Annual Performance Plan, such as results on stewardship objectives, performance goals and indicators that were established. 	
<p><i>9.2 Cross-Agency Collaborations.</i> As a part of the discussion of strategies, or where applicable, describe how the agency is working with other agencies to achieve strategic objectives, APGs, and performance goals. Describe responsibilities of key agency programs and external agency partners (e.g., other Federal programs, grantees; state, local, tribal, and foreign governments; major long-term contractors, etc.) and the nature of their expected contribution to strategic objectives.</p>	SP / APP / APR
<p><i>9.3 Hyperlinks.</i> Links or references to other more detailed plans, evaluations, or other studies to support the decisions and strategies described in the agency plan or report.</p>	SP / APP / APR
<p><i>9.4 Data Validation and Verification.</i> Include an assessment by the agency head of the reliability and completeness of the performance data included in the plan and report, preferably as an appendix that can be attached to performance plans and reports or hyperlinked to Performance.gov. The description must include how the agency ensures the accuracy and reliability of the data used to measure progress towards its performance goals (including Agency Priority Goals), including an identification of—</p> <ul style="list-style-type: none"> • the means to be used to verify and validate measured values; • the sources for the data; • the level of accuracy required for the intended use of the data; • any limitations to the data at the required level of accuracy; and • how the agency will compensate for such limitations if needed to reach the required level of accuracy. <p>The agency should summarize how the agency uses data to promote improved outcomes, including assessing the use and effectiveness of alternative form performance goals. Section 240 addresses approaches the agency should use to meet the data validation and verification requirement for both agency annual plans and annual reports. The agency may include an addendum that lists and briefly explains changes in performance indicators as compared to the prior year's performance report.</p>	APP / APR
<p><i>9.5 Lower-Priority Program Activities.</i> Each agency must reference the President's Budget volume. "The President's Budget identifies the lower-priority program activities, where applicable, as required under the GPRA Modernization Act of 2010, 31 U.S.C. 1115(b)(10). The public can access the volume at: http://www.whitehouse.gov/omb/budget." (See section 240 for more information on lower-priority program activities.)</p>	APP

210.22 The Evidence Act established a number of planning and reporting requirements specific to evidence and evaluation-building. How should agencies integrate a discussion of evidence and evaluation building efforts from these plans when writing Strategic Plans, Annual Performance Plans, and Annual Performance Reports for publication?

The Evidence Act established a number of requirements for agencies related to efforts to advance evaluation and evidence-building, including Learning Agendas (i.e., Evidence-Building Plans) and Capacity Assessment as new components of the Agency Strategic Plan, and the creation of Annual Evaluation Plans. These deliverables represent the agencies' primary planning documents for detailing their efforts to build and use evidence and conduct evaluation activities in a comprehensive, coordinated way across the agency.

Importantly, the efforts and discussion detailing an agency's evidence-building work complement and are mutually reinforcing to the agency's organizational performance management and improvement efforts, establishing organizational strategic objectives and priority goals in strategic and performance plans and reports, tracking and reporting on progress made against those objectives, discussing results achieved and barriers to performance, and identifying proposed actions or changes to implementation strategies where course corrections are needed, including identifying new or improved evidence. It is expected that agencies will necessarily need to integrate content and discussion from the Learning Agenda, Capacity Assessment, and Annual Evaluation Plan into the agency's strategic and performance plans and reports when drafting these documents in order to create a coherent, cohesive narrative that depicts the full complement of activities and efforts – both planned and implemented – to improve the organizational performance and program and service delivery of the agency. While the content table and information elements outlined in section [210.21](#) detail the required data elements for constructing the agency Strategic Plan, Annual Performance Plan, and Annual Performance Report, agencies must also effectively incorporate a discussion of evidence-building efforts in these plans and reports where appropriate.

The incorporation of information described in the Learning Agendas, Capacity Assessments, and Annual Evaluation Plans should ultimately articulate and reinforce those elements of the SP, APP, and APR in order to create a coherent, comprehensive picture of the agency's organizational management and performance. Agencies have flexibility in terms of the organizational layout of their SP, APP, and APR in deciding how this narrative is incorporated within these documents. The following guidance is provided to agencies in considering how to integrate the discussion and narrative of ideas of the Evidence Act deliverables into the SP, APP, and APR.

- **SP** – The agency should seek to describe how information from the full portfolio of evidence was used in developing the Strategic Plan, including how evaluation and research findings were used to establish or revise the agency's strategic objectives and identify how effective strategies or approaches as determined by credible, high-quality evidence, will be used to reach these objectives. As appropriate, agencies are encouraged to reference priority questions and other information from the Learning Agenda and Annual Evaluation Plan described. In addition, agencies should consider how the findings and analysis from the Capacity Assessment can inform their Strategic Plan, particularly as they consider their agency's capacity to address key strategic objectives and goals. Other examples of evidence to be included are program reviews performed under OMB Circular No. A-129 for credit programs, findings from a comprehensive literature review, or recent results of high-quality evaluations.
- **APP** – The agency should seek to describe how evidence, including from program evaluation and other methods, was used to develop the performance plan, including information from the Learning Agenda, Capacity Assessment, and Annual Evaluation Plan, as appropriate. This description should include how a portfolio of evidence and other statistical findings were used to establish or revise the agency's performance goals; identify evidence-based strategies or approaches that will be used

to reach these goals; provide an update on the agency's progress toward these goals; and inform budgetary allocations using information about cost-effectiveness of agency efforts. The agency should be aware of and state the quality of the evidence cited and its relative strength in support of the decisions being made.

- **APR** – The agency should describe findings from agency-funded evaluations and other relevant evidence-building activities completed during the prior fiscal year, including those undertaken pursuant to the agency's Learning Agenda and Annual Evaluation Plan. In addition, the agency should discuss any evidence related to its understanding of program performance, the problems the program aims to address, and external factors that might influence agency performance. In addition, agencies should articulate how findings from evaluations or other evidence-building activities were used in decision-making processes related to programs, policies, and budget efforts. In citing evidence, the agency should address the relative strength of the evidence, and may consider adding such information to the data validation and verification appendix, as appropriate.