

**President's Management Agenda
Department of Agriculture**

Initiative	Original (January 2002)		As of June 30, 2008		As of September 30, 2008		Proud to Be Target 7/1/09
	Status	Progress	Status	Progress	Status	Progress	Status
Human Capital	R	Y	G	Y	G	Y	G
Competitive Sourcing	R	Y	Y	G ↑	Y	G	Y
Financial Performance	R	Y	R	G	R	G	Y
E-Government	Y	G	R ↓	G	R	G	G
Performance and Improvement	R	Y	G	G	G	G	G
Real Property	NA	NA	Y	G	Y	G	G
Eliminating Improper Payments	NA	NA	Y	G	G ↑	G	G
Faith-based and Community Initiative	NA	NA	G	G	G	G	G
Improved Credit Program Management	NA	NA	R	G	R	Y ↓	R

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Initiative			
HUMAN CAPITAL Boyd Rutherford Lead RMO Examiner: Kristi Kubista-Hovis OPM HC Officer: Lynn Matherly	 Green	 Yellow	<p>USDA will remain green for status and yellow for progress.</p> <ul style="list-style-type: none"> The Forest Service must continue to have regular meetings with OMB, creating a new reorganization game plan. Though we acknowledge NRCS submitted plan to obtain efficiencies it is not the revised State organizational structure report we have been asking for, for over a year. There needs to be a tie in to the individual state plans. FSA needs to begin implementing the recommendations of the efficiency plan. Submitted documentation on FSA activities does not clearly articulate how FSA plans to use the efficiency plan report. <p>Key Data: <u>92.8/81</u> % of new hires meeting the 45-day hiring/ notification level Competency gaps closed (Y/N) for: ___ HRM (___ % closed) * Leadership (___ % closed) ___ IT (% pending survey) ___ Acquisition (% pending survey) % employees covered under PM systems scoring \geq 80: <u>25%</u></p> <p><u>Planned actions for next quarter:</u> Agency-Specific (continued):</p> <ul style="list-style-type: none"> Update and review Leadership Succession Plan as necessary Each USDA agency develops action plan with targets and milestones to ensure use of CHCO Management Satisfaction Survey tool Provide evidence that USDA audit reports and responses are timely Provide revised DE independent internal audit SOP Issue and provide copy of USDA Delegated Examining policy
	<p align="center">Overarching</p> <p>___ Implements agency-specific and Governmentwide measures (Y)</p> <p>___ SHCM contributes to mission accomplishment (G)</p> <p align="center">Governmentwide</p> <p>___ Implements strategies to achieve results in Governmentwide SHCM focus areas (Y)</p> <p>___ Achieves results in Governmentwide SHCM focus areas (G)</p> <p align="center">Agency-Specific</p> <p>___ Implements strategies to meet agency-specific goals (Y)</p> <p>___ Revises, implements, and issues HC Plan to agencies and agencies. (Y)</p> <p>___ Implements and begins tracking management satisfaction survey for permanent vacancies. (Y)</p> <p>___ Implements strategies to improve independent audit (Y)</p> <p>___ Implements recruitment for SES CDP program and strategies to assess current class (Y)</p> <p>___ Achieves agency-specific goals (G)</p> <p>___ 80% of permanent vacancy recruitments are monitored via a management satisfaction survey (G)</p> <p>___ Independent audit is effective and met targets (G)</p> <p>___ 80% of SES CDP candidates recommended by USDA ERB for certification by OPM (G)</p>	<p><u>Actions Taken Since June 30, 2008</u></p> <ul style="list-style-type: none"> Revalidated PTB 5 checkmarks in organizational restructuring, human capital planning and IT competencies. <p>Governmentwide:</p> <ul style="list-style-type: none"> Provided Acquisition Status Report for closing competency gaps, including an assessment of strategies and milestones, and an updated SSM Acquisition Resource Chart. Submitted Time-to-Hire Reports, with average hiring time for SES and non-SES hires. <p>Agency-Specific:</p> <ul style="list-style-type: none"> Submitted progress report on organizational restructuring activities Submitted progress report on Accountability System audits and reviews Submitted copy of guidance for USDA DE units to ensure accountability Submitted progress report on USDA SES CDP <p><u>Planned Actions for Q41 FY 2009</u></p> <p>Governmentwide:</p> <ul style="list-style-type: none"> Submitted an updated SSM Leadership Competency Profile Chart. Submit FY 2008 HCMR with all SSMs including the Leadership Competency Profile Chart if not submitted in September. Complete FHCS <p>Agency-Specific:</p> <ul style="list-style-type: none"> Establish team to review and update Strategic Human Capital Plan, report progress Report progress of organizational structure activities Begin selection process for next SES CDP Report on performance management system improvement plans 	

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Initiative			
<p>COMMERCIAL SERVICES MGMT.</p> <p>Agency Lead: Charles R. Christopherson Jr. <i>Chief Financial Officer</i></p> <p>Jon Holladay <i>Associate Chief Financial Officer</i></p> <p>Lead RMO Examiner: Joe Montoni</p> <p>Lead OFPP Analyst: Mathew Blum</p>	<p align="center"></p> <p>Yellow</p> <p>Next ↑ est. by <u>Q1</u> <u>FY09</u></p>	<p align="center"></p> <p>Green</p>	<p>USDA maintains its progress score for this quarter; however, failure to complete the Forest Service IT competition validation study within the next quarter will result in a downgrade in progress.</p> <p>USDA's Forest Service has not conducted its post competition accountability independent verification for the Information Solutions Organization. The review was temporarily delayed by an initial direction from the Forest Service OGC not to proceed in light of the statutory moratorium on competitive sourcing, a decision that was later reversed by the USDA OGC. The revised estimated completion date is December 31, 2008.</p> <p>[Comment for USDA: please indicate whether the OCIO and OCFO BPR action items were completed on 9/30/08.]</p>
	<p><u>Approved competition plan</u> <input checked="" type="checkbox"/> "yellow" plan (9/03) <input checked="" type="checkbox"/> "green" plan on (9/06)</p> <p><u>Standard competitions</u> <input checked="" type="checkbox"/> one completed OR announced one > "yellow" plan FTEs (9/03) <input type="checkbox"/> announced in accordance with "green" plan schedule (G) (date) <input checked="" type="checkbox"/> completed ≥ 90% in A-76 timeframe past 4 Qs (G)</p> <p><u>Standard and streamlined competitions</u> <input checked="" type="checkbox"/> at least 10 or sufficiently large completed since Jan. 2001 <input checked="" type="checkbox"/> encourage participation by private and public sectors (Q1 2006) <input checked="" type="checkbox"/> reviewed once implemented (Q3 2006)</p> <p><u>Streamlined competitions completed in Circular timeframe</u> <input checked="" type="checkbox"/> ≥ 75% during the past 2 Qs (6/30/04) <input checked="" type="checkbox"/> ≥ 95% during the past 4 Qs (6/30/04)</p> <p><u>Announced competitions cancelled</u> <input checked="" type="checkbox"/> ≤ 20% in past two Qs (6/30/04) <input checked="" type="checkbox"/> ≤ 10% in past year (6/30/04)</p> <p><input checked="" type="checkbox"/> Justifications for all commercial activities exempt from competition (12/31/04) Savings <input checked="" type="checkbox"/> anticipated net savings for past 2 Qs (12/31/04) <input checked="" type="checkbox"/> anticipated for past 3 Qs (Q2 2005) <input type="checkbox"/> independently validated (G+) (date)</p>	<p><u>Actions Taken Since June 30, 2008:</u></p> <ul style="list-style-type: none"> • Provided updated USDA's FY 2009 CSM Plan to OMB. • Completed planned management efficiency assessments and other commercial services management efforts, and announced A-76 study, according to schedule: <ul style="list-style-type: none"> • GIPSA, Federal Grain Inspection Service Field Support was completed and submitted to the OCFO on 9/16/08. • OCIO, ITS – BPR –Implementation of the activity-based cost management system to facilitate the fee-for-service model will be completed by 9/30/08. • OCFO, Financial Management Modernization Initiative – Hosting Service CSM study will be announced by 9/30/08. <p><u>Planned Actions for Q1 FY 2009:</u></p> <ul style="list-style-type: none"> • Complete commercial services management efforts for the following: 1) MEA on Headquarters Information Technology Services (Research, Education and Economics Mission-Area) – including systems development, and telecommunications, 2) OCFO, FMMI – Issue Hosting Request for Proposal, 3) NRCS – MLRA Implementation Progress -126 Soil Offices Established, 4) Enterprise Messaging System (EMS) – implement open communication server and exchange environments, 5) OCIO, ITS-BPR – consolidate storage area network operations and maintenance at NITC, 6) OCIO, ITS-BPR – implement a proactive infrastructure monitoring tool for the FSA web farm. • Submit USDA's post competition accountability review independent verification summary report to OMB. • Provide quarterly updates in the Competitive Sourcing Tracking System. 	

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<p>E-Government</p> <p>Agency Lead: Charles Christopherson Chief Information Officer</p> <p>Lead RMO Examiner: Kristi Kubista- Hovis</p> <p>Lead IT/E-Gov Analyst: Sara Siddiqui</p>	<p align="center"> Red</p> <p>Enterprise Architecture <u>X</u> Has an Enterprise Architecture with a score of 4 in the "Completion" and 4 in both the "Use" and "Results." (March 31, 2008)</p> <p><u>X</u> Has an Enterprise Architecture with a score of 4 in the "Completion" and 4 in either the "Use" or "Results." (March 31, 2008)</p> <p>Acceptable business cases for major systems __ for more than 50% () __ for all on ()</p> <p>Cost/schedule/performance adherence for major IT <u>X</u> overruns/shortfalls < 30% (12-31-04) __ EVMS shows overruns/ shortfalls <10% (Q408?)</p> <p>Security of all IT systems <u>X</u> 80% secured or IG verifies effectiveness (Y) (9-30-04) <u>X</u> 90% secured (G) (9-30-04) __ IG or Agency Head verifies effective & rates certification as Satisfactory (G)</p> <p>E-Gov implementation <u>X</u> has current plan in place (12-31-07) <u>X</u> adheres to agency-accepted and OMB approved implementation plan (12-31-07) (G)</p> <p>MAINTAINING GREEN __ all IT systems secure __ IT systems installed in accordance with security configurations <u>X</u> Privacy Impact Statements for 90% of applicable systems <u>X</u> 90% of systems w/personally ID info have system of records <u>X</u> Has an agreed-upon plan to meet necessary communication requirements for COOP and COG (Q1 FY 2008)</p> <p>Next ↑ est. by <u>Q4</u> <u>FY09</u></p>	<p align="center"> Green</p> <p><u>Actions Taken Since June 30, 2008</u></p> <ul style="list-style-type: none"> USDA submitted their annual FISMA report by September 5, 2008. USDA presented EVM process to Karen on 10/2/08. USDA successfully submitted a draft Exhibit 53 by August 6. <p><u>Planned Actions for Q1 FY 2009</u></p> <ul style="list-style-type: none"> Post 100% of the discretionary grant applications to grants.gov. Submit quarterly FISMA report. Submit a quarterly high-risk report as required by OMB M05-23. Quarterly updates of NSC-310 are due to OMB by September 1, December 1, March 1, and June 1. All materials should be submitted to NCS3-10@omb.eop.gov. USDA must have a mutually agreed upon plan of action and milestones for the implementation of the DNSSec with a target completion date of December 2009 in place by October 24, 2008. By October 27, 2008, USDA must meet their HSPD-12 mutually agreed upon goal for issuing PIV cards. By November 1, 2008, agencies must be issuing HSPD-12 credentials to all new employees as a matter of common business practices. Agencies must submit their remediation plans for business cases initially identified for the FY 2010 Management Watch List. USDA must submit it's E-Gov Report by October 14, 2008. Per agreed upon NCS 3-10 implementation plan, complete all requirements at all sites by 7/7/08. USDA will submit a status update discussing progress to OMB by September 1, December 1, March 1, and June 1 to NCS3-10@omb.eop.gov. The status update is to indicate progress against each milestone due as listed in the agency-EOP agreed upon plan. In accordance with OMB memo dated May 23, 2008, agency CIO to confirm by Dec 17 (via email to cauth@omb.eop.gov) that the agency has a documented plan for phasing in use of HSPD-12 credentials with physical and logical access control systems. 	<p>USDA will remain red for status and green for progress.</p> <ul style="list-style-type: none"> USDA's IG has not signed off on the CIO's C&A activities according to the IG's September 2008 FISMA report. USDA remains red for status until the IG signs off. Agencies must have their weaknesses remediated and/or an acceptable plan in place to remediate the identified weaknesses before they start activities for the new fiscal year for any investments which remained on the FY 09 Management Watch List. All projects associated with any investment on the FY 09 Management Watch List will automatically be placed on the High Risk List. OMB Policy Memo M-06-22: Continue to work with OMB to submit baseline cost estimates for any additional legacy investments impacted by an ongoing or planned future E-Gov or LoB initiative implementation, or reach agreement with OMB no additional investments are impacted by an E-Gov or LoB initiative. <p>Key Data: # of high risk projects: 18 # of MWL investments out of the total number of investments: 37 out of 287 Operational [Planned] # of Government systems: 610 # of Contractor systems: 0 # of Gov't & Ctr systems: 610 # of milestones completed for E-Gov implementation required by Q42008 out of the Total milestones: 211 out of 215 for FY08</p>

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<p>Initiative</p> <p>PERFORMANCE IMPROVEMENT</p> <p>Agency Lead (Career): Scott Steele</p> <p>Lead RMO Examiner: Noah Engelberg</p> <p>Lead PII Analyst: Abigail Norris</p>	<p align="center"> Green</p> <p>Executive Order Implementation Plan <input checked="" type="checkbox"/> GREEN – Demonstrates effectiveness/efficiency and utilizes PIC best practices (2/08) <input type="checkbox"/> YELLOW -- On track to implement EO plan. (date)</p> <p>Agency Planning <input checked="" type="checkbox"/> GREEN -- At least one outcome measure for each strategic goal and program. (ongoing) <input type="checkbox"/> YELLOW -- Plans contain outcome measures for each strategic goal. (date)</p> <p>Reporting and Transparency <input checked="" type="checkbox"/> GREEN -- Annual budget and performance documents include: <input checked="" type="checkbox"/> at least one outcome-measure covering each major area; <input checked="" type="checkbox"/> at least one efficiency measure for each program. <input checked="" type="checkbox"/> a discussion of performance gains /shortfalls; <input checked="" type="checkbox"/> the full cost of achieving performance goals including marginal cost analyses; <input checked="" type="checkbox"/> evaluation study results (6/06) <input type="checkbox"/> YELLOW-- Annual budget and performance documents do not meet all green criteria include:</p> <p>Regular Assessment <input checked="" type="checkbox"/> GREEN -- Quarterly meetings examine each strategic goal area. (ongoing) <input type="checkbox"/> YELLOW -- Quarterly meetings examine most strategic goal areas. (date)</p> <p>Improvement Actions. <input checked="" type="checkbox"/> GREEN -- Completes program improvement actions and ensures managers are held accountable. (6/08) <input type="checkbox"/> YELLOW -- Regular program assessments direct program improvement actions and managers are held accountable. (date).</p>	<p align="center"> Green</p> <p><u>Actions taken this quarter:</u></p> <ul style="list-style-type: none"> All USDA internal scorecards and other performance criteria have been aligned with Proud to Be 6. USDA submitted all Department Estimates packages to OMB on time, with all supporting documentation at the current services level. The Department estimates included performance information such as measures included in the PART. USDA staff from several mission areas met to discuss input for developing a timeline and scope of work for a contract with the National Academy of Sciences to consolidate a number of report requirements related to bioenergy. Agency criteria have been revised to ensure that they meet the current PTB guidance. Agencies continued to work with the RMO to finalize agreements on measures changes (from the quality improvement review) to be completed during the fall updates. <p><u>Planned actions for next quarter:</u></p> <ul style="list-style-type: none"> USDA will complete fall update, which will include all agreed to revisions of performance measures. USDA will provide Key Data, shown as "tbd." USDA must meet specific agreed to milestones in the Forest Service Watershed efficiency document. 	<p>USDA maintains its green for status and green for progress.</p> <ul style="list-style-type: none"> Draft improvement plans were sent to OMB, and were finalized in PART Web by the end of July. During the 3rd quarter, FNS finalized and released Food Stamp payment accuracy rates for '07. The rate of 94.36% is a record USDA is continuing to track the joint USDA/DHS AQI program. The Forest Service, RD and REE are continuing to track Notices of Funds Available (NOFA's) for renewable energy activities. A third quarter report was submitted, with a fourth quarter report currently being finalized. The Forest Service, research and rural development programs will jointly review all grant solicitations related to renewable energy/bioproducts, and submit a quarterly report on their activities. <p>Key Data: Agency Planning: 100% programs with at least one outcome-oriented; 100% with efficiency measure.</p> <p>FY09 Improvement Plan Completion (tbd): cumulative # of improvement actions completed, # planned, % completed on time. (tbd)</p> <p>Program Results (tbd): % performance measures improved over prior year; % measures that met or exceeded their targets, 97% programs with evaluations fully showing results (based on funding).</p>

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Initiative Real Property Agency Lead: Boyd Rutherford, Assistant Secretary for Administration Gibert Smith, Acting Senior Real Property Officer Lead RMO Examiner: John Pasquantino Lead OFFM Analyst: Nikki Zook	 Yellow Next ↑ est. by <u>Q2 '09</u> <ul style="list-style-type: none"> Asset management plan (AMP) <input checked="" type="checkbox"/> in place by <u>Q2 '06 (Y)</u> <input checked="" type="checkbox"/> consistent with Federal Real Property Council (FRPC) standards by <u>Q2 '06 (Y)</u> <input checked="" type="checkbox"/> OMB-approved by <u>Q2 '06 (Y)</u> <input checked="" type="checkbox"/> 3 year timeline for meeting plan goals/objectives by <u>Q2 '07 (G)</u> <input checked="" type="checkbox"/> evidence that plan is being implemented to achieve improved real property management by <u>Q4 '07 (G)</u> Accurate and current inventory <input checked="" type="checkbox"/> in place by <u>Q3 '04 (Y)</u> <input checked="" type="checkbox"/> consistent with FRPC standards by <u>Q3 '04 (Y)</u> <input checked="" type="checkbox"/> provided to govt.-wide real property database by <u>Q1 '07 (Y)</u> <input checked="" type="checkbox"/> used in daily management decision-making by <u>Q2 '09 (G)</u> Real property performance measures <input checked="" type="checkbox"/> in place by <u>Q3 '04 (Y)</u> <input checked="" type="checkbox"/> consistent with FRPC standards by <u>Q1 '06 (Y)</u> <input checked="" type="checkbox"/> used in daily management decision-making by <u>Q2 '09 (G)</u> <input checked="" type="checkbox"/> Evidence that real property management is consistent with agency strategic plan, AMP, and performance measures by <u>Q2 '09 (G)</u> 	 Green <u>Actions taken since June 30, 2008</u> <ul style="list-style-type: none"> Met all milestones identified in the three year timeline and the Proud to Be V. Worked with OMB to edit USDA's Evidence Document and Green Presentation. Implemented systemic corrective actions based on FY 07 performance results to meet FY 08 targets and inform FY 09 goal-setting. Reported on using SF13327, Report of Real Property Available for Transfer to Federal Agencies Identified FY 09 disposal targets. Assessed the Capital Investment and Planning Process (CPIP) <u>Planned Actions for Q1 FY 2009</u> <ul style="list-style-type: none"> Identify specific FY 09 disposal actions Report quarterly progress toward meeting FY 09 disposal target Ensure successful annual reporting of inventory and performance data on all assets to the government-wide database (FRPP) by 12/15/2008 Assess agency progress with completing physical inventories and data validation Develop methodology for prioritizing assets for maintenance Rewrite current real and personal property position descriptions to focus more on overall asset and portfolio management Key Data FY 08 Target Disposals \$ ____ FY 08 Actual Disposals \$ ____ FY 09 Target Disposals \$100M FY 09 Actual Disposals \$TBD Cumulative Disposals \$ ____	<p>USDA remains Yellow in status and is Green for Progress. USDA is making steady progress under the initiative. In order to move to green status, USDA must demonstrate that: (a) asset data is used routinely at a department level to make management decisions regarding the real property portfolio; (b) measurable results are being achieved with respect to critical performance measures (e.g. disposals, condition).</p> <p>Given the need to demonstrate changes to the make-up of USDA's real property portfolio, OMB believes Q2'09 is a reasonable timeframe for these two areas to be met and for the status upgrade to occur.</p> <p>Critical next steps to achieve Green status are:</p> <ol style="list-style-type: none"> Demonstrate to OMB, through evidence, that USDA has a Department-level strategic planning process to support a standardized long-range plan for managing real property asset budgeting. Demonstrate, through positive changes in key performance measures, that projects underway to right-size real property are achieving their intended goals. <p>Once OMB and USDA have agreed to how the two elements above will be met, USDA should revise its Evidence Document and Green presentation accordingly.</p> <p>Note: USDA is continuing its implementation of a coordinated strategy to manage the agencies deferred maintenance backlog. USDA has completed an Implementation Plan that contains steps that will meet the requirement to track deferred maintenance data and annually update the condition index.</p>

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<p>Faith-based and Community Initiative</p> <p>Agency Lead:</p> <p>Erin White</p> <p>Lead OMB Examiner:</p> <p>Jennifer Bell</p>	<p align="center"> Green</p> <ul style="list-style-type: none"> Coordinated outreach & technical assistance <input checked="" type="checkbox"/> developed comprehensive strategy employing 5 of 7 best practices <input checked="" type="checkbox"/> fully implemented, employing all 7 best practices Barrier free access <input checked="" type="checkbox"/> taken steps to ensure barrier free access including 7 of 9 best practices <input checked="" type="checkbox"/> monitors State compliance, including all 9 best practices, addresses violations promptly Participation by FBOs/CBOs <input checked="" type="checkbox"/> established procedures to collect data on participation in select programs <input checked="" type="checkbox"/> collects accurate and timely data, working to expand collection to formula programs and make data available to the public. Pilot Projects <input checked="" type="checkbox"/> projects implemented <input checked="" type="checkbox"/> expands the use of pilots to test new strategies when appropriate Evaluation <input checked="" type="checkbox"/> has reported outcome-based evaluations of existing pilot projects. <input checked="" type="checkbox"/> builds outcome-based evaluations into new pilots, reports progress to WHOFBCI in a timely manner and considers the initiative in designing broader evaluations. Expand Participation of Grassroot FBCOs <input checked="" type="checkbox"/> Achieve initiation of 3 out of 5 best practices within the FY2007 grant funding cycle. <input checked="" type="checkbox"/> Achieve initiation of all 5 best practices within the FY2007 grant funding cycle. 	<p align="center"> Green</p> <p><u>Actions Taken Since June 30, 2008</u></p> <ul style="list-style-type: none"> Successfully completed all deliverables in accordance with its planned actions set forth in its Proud To Be V Goals. The most notable: three pilot programs completed; five pilot programs in progress. This quarter, FAS began activity on a second pilot project designed to include FBCOs in the process of creating program success indicators. <p><u>Planned Actions for Q1 FY 2009:</u></p> <ul style="list-style-type: none"> CSREES, FAS, FNS, and RD will submit FY 2008 data on federal discretionary award programs. FAS will expand on its current pilot programs by adding an outreach component, whereby pilot program participants share their experiences of partnering with grassroots faith-based and community organizations with the Food Aid community at the International Food Aid Conference. This activity will also encompass analysis of lessons learned FNS will submit the FY 2007 data to the USDA FBCI staff office collected under the Final Rule "Data Collection Related to the Participation of Faith-Based and Community Institutions and Organizations." RD will begin to share "Lessons Learned" from the Equal Treatment Rule survey pilot project with relevant program and state office. RD will issue field guidance as identified/needed regarding the compliance review process, including an equal treatment regulation checklist. 	<p>USDA maintains its green for status and green for progress</p> <p><u>Ongoing Deliverables</u> All relevant agencies and staff office will continue:</p> <ul style="list-style-type: none"> program and evaluation activities for all approved pilot programs. to conduct outreach and technical assistance activities. to provide funding data and other information to WHOFBCI as requested. to submit "Stories of Lives Transformed" to FBCI staff office. <p>In addition, FNS Regional Offices will continue to implement outreach and technical assistance strategies aimed at identifying and eliminating barriers to access and increasing participation by FBCOs in its State-administered programs. These strategies will have a special emphasis on (1) increasing FBCO participation in the Summer Food Service Program as the program offering the best opportunity for FBCO partnerships, and (2) increasing FBCO participation in programs that target special populations in need, including Hispanic communities and elderly individuals.</p>

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<p>Improved Credit Program Management</p> <p>Agency Lead: Charles Christopherson, Jr., Chief Financial Officer</p> <p>Jon Holladay, Associate Chief Financial Officer</p> <p>Lead RMO Examiner: Jennifer Bell</p> <p>Lead Credit Analyst: Sarah Lyberg</p>	<p align="center"></p> <p align="center">Red</p> <p align="center">Next ↑ est. by Q1 '10</p> <ul style="list-style-type: none"> • Defines target borrower segments <ul style="list-style-type: none"> <input checked="" type="checkbox"/> serves target borrowers <input type="checkbox"/> establishes and monitors risk standards • Establishes or verifies sound lending policies and procedures <ul style="list-style-type: none"> <input checked="" type="checkbox"/> effective transaction approval processes <input type="checkbox"/> effective loan portfolio management <input type="checkbox"/> effective loss recovery processes • Establishes or verifies sound collateral valuation processes <ul style="list-style-type: none"> <input type="checkbox"/> implemented policies and procedures • Maintains effective management information reporting <ul style="list-style-type: none"> <input type="checkbox"/> identified and substantiated risk indicators <input type="checkbox"/> implemented • Controls costs <ul style="list-style-type: none"> <input type="checkbox"/> established current cost estimates <input type="checkbox"/> established benchmarks and goals <input type="checkbox"/> reaches goals • Debt Collection Improvement Act <ul style="list-style-type: none"> <input type="checkbox"/> compliance • Customer Satisfaction <ul style="list-style-type: none"> <input type="checkbox"/> meets or exceeds industry standards 	<p align="center"></p> <p align="center">Yellow</p> <p align="center">↓</p> <p><u>Actions Taken Since June 30, 2008</u></p> <ul style="list-style-type: none"> • USDA has been moving forward, but did not deliver on the key goal of establishing the Credit Management Review Council • There has, however, been significant progress on the PTB6 and USDA continues to strive to achieve its goals and milestones. <p><u>Planned Actions for Q1 FY 2009</u></p> <ul style="list-style-type: none"> • Rural Development will implement a Credit Management Review Council (RD CMRC) • Issue customer satisfaction survey (CSS) to FSA customers and, for RD issue a CSS RFP, as necessary and select vendor. • Secure contract support for identifying and testing RD risk characteristics. • Establish quarterly portfolio review meetings for budget, program, and accounting staff of FSA and RD. • Analyze significant changes in annual subsidy rates. • Contract for RD Budget and Performance Management System (BPMS) modules. • Set annual targets for RD administrative costs based upon prior year unit costs and implement changes to achieve the targets. • Budget to provide OCFO written explanation of significant re-estimate changes for financial statement purposes. • Perform trend analysis on re-estimate rates. Provide explanation of significant changes. • Revise cash flow models to meet OMB requested changes for FY 2010 budget preparation. • Determine improvements for regular Portfolio/Delinquency Trend reporting that utilizes existing risk indicators with brief summary of findings, decisions, milestones, and planned/executed actions, to be provided to Program Management and OMB. 	<p>USDA has downgraded to yellow on progress this quarter.</p> <ul style="list-style-type: none"> • Not establishing the CMRC will delay timing for other milestones in Q1 09 and puts USDA at risk for progress next quarter as well. • OMB and USDA staff continue working on the PTB VI, which is nearing the final draft stage. <p><u>On-Going Activities</u></p> <ul style="list-style-type: none"> • Maintains regular monthly management information reporting, and will continue working to incorporate risk indicators into analysis. • Regularly reports progress on annual goals. • Analyzes existing loan portfolio reports and systems' reporting capabilities to develop more effective management reports.