



# BTEC BULLETIN

NEWS FROM THE BUSINESS TRANSFORMATION EXECUTIVE COMMITTEE March 2005 ISSUE 22

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[USAID Business Transformation Plan](http://inside.usaid.gov/BTEC) is located at <http://inside.usaid.gov/BTEC>

## BTEC Sets New Priorities

At its February meeting, the Business Transformation Executive Committee (BTEC) reviewed key management reform priorities for the next 12 to 24 months that were identified at its retreat last fall.

Human Capital initiatives topped the list, specifically the need for more effective processes to (1) assign the right people to the highest foreign policy priorities and core presidential initiatives ( e.g., HIV/AIDS, Iraq); (2) improve training and succession planning for senior managers (3) place new hires and provide opportunities for career development; and (4) facilitate the career development of Foreign Service Nationals.

More useful management reports were also identified as high priority. The BTEC intends to provide a greater level of oversight for initiatives that are critical to management reporting, including establishment of an Agency executive information system (EIS), continued roll-out of the Phoenix financial management system to overseas missions, deployment of a new procurement system, and continued collaboration with the State Department on information technology (IT) infrastructure and systems.

In the area of strategic budgeting, which supports the performance and budget integration goals of the President's Management Agenda, the committee will oversee projects to align budget resources with the Agency's new strategic planning methods.

**(Continued on Page 2)**

## New Strategic Planning Focuses on Performance and Results

USAID's new strategic planning process categorizes hundreds of field mission strategic objectives into 40 standardized program components that allows the agency to set performance targets and create improved accountability.

The revised strategic planning will facilitate improved Agency-level reporting, while allowing Missions enough operational flexibility to address country-specific situations around the world.

In accordance with the new policy, a preliminary Agency Framework is in development and Regional Bureaus have already started work on their new Bureau Strategy Frameworks for completion by early spring. Agency Working Groups in each of the major sectors are currently meeting to develop [standardized common indicators](#) for each of the program components. A key objective is to improve USAID's ability to report the Agency's results to Congress, OMB, and other external audiences.

The new policy will be available in ADS 200, "USAID Programming Policy" by June 2005.

The [interim guidance](#) on the new strategic planning process that includes the new program components is available on the intranet site under Agency Notices.

## IN THIS ISSUE

BTEC Sets New Priorities.....1  
New Strategic Planning Focuses on Performance & Results.....1  
Phoenix Deployed to LAC Missions..... 2  
New USAID Employee Evaluation System..... 2

## (BTEC Priorities from Page 1)

At its meeting, the BTEC saw a demonstration of the Phase I prototype for the EIS, a key new priority. The prototype provides financial management information for commitments, obligations, and disbursements for both operating expenses (OE) and program funds.

The initial users of the EIS will be limited to two people per bureau since the tool is a web-based software that requires users to have a license and dedicated password. Training on the software began on February 10th. In Phase II of the EIS, scheduled for delivery in June 2005, accrual data will be added to the system, which will enable pipeline reporting.

The new priorities directly support the four strategic areas in the Agency's business transformation plan – strategic management of human capital, business systems modernization, strategic budgeting and knowledge for development.

## Did you know...

... that USAID recently received an A+ on the federal report card that grades agencies on computer security per the Federal Information Security Management Act? This is a major improvement from the C- it received in 2003. The overall Government-wide grade is a D+. The report cards help Congress assess the government's security progress. Agencies were graded on how well they met computer security requirements such as ensuring proper password management by workers, restricting employee access to sensitive networks and documents, and creating procedures for reporting security problems ...

Your comments and suggestions are welcome. Please contact your bureau's [BTEC member](mailto:BTEC member or nbarnett@usaid.gov) or [nbarnett@usaid.gov](mailto:nbarnett@usaid.gov). You may also contact us online at <http://inside.usaid.gov/BTEC/>

## Phoenix Deployed to LAC Missions

On February 15, 2005, the Phoenix financial management (FM) system went live in eight Controller missions in the Latin America and Caribbean (LAC) region. The new missions where Phoenix is now installed are: Bolivia, Dominican Republic, Haiti, Jamaica, Honduras, El Salvador, Guatemala, and Nicaragua. These missions are in addition to the five pilot locations that last summer began using Phoenix as their FM system of record. All of these missions have access to Phoenix and are posting financial transactions to the system.

Lisa Fiely, USAID's Chief Financial Officer (CFO), and several CFO staff visited the LAC missions during the "go-live" phase to ensure a smooth transition to Phoenix by providing support through briefings and training and problem-solving sessions.

Initial plans to complete field deployment by December 2005 using an upgraded web-based version of Phoenix have been revised due to technical problems with the new software affecting telecommunications and data migration issues. As a result the time frame for completion of world wide deployment has been revised for April – June 2006. To prevent further delays due to software issues, Ms. Fiely is now considering deploying the current version worldwide. A final decision will be made after the newer upgraded software is field tested at selected missions. Phoenix is still on track to be hosted on servers in Charleston, South Carolina beginning in October 2005 as part of the joint financial management system (JFMS) project with the Department of State.

Phoenix Overseas Deployment is a key initiative for Business Systems Modernization, one of four components of USAID's business transformation plan. This project also addresses the goals for Improved Financial Management in the President's Management Agenda that is available at <http://www.whitehouse.gov/results/>

## New USAID Employee Evaluation System

The performance evaluation system for Agency Civil Service employees has been revised for the 2005 rating cycle.

The changes simplify and streamline the formal rating and evaluation process and reduce the time to prepare an Annual Evaluation Form (AEF), allowing supervisors more time to counsel employees on performance and career development as well as to provide critical feedback.

"The new system took longer than an elephant's gestation to birth, but it is just what the doctor ordered to ease the burden on raters, protect employee rights, and link our performance system to standards under the President's Management Agenda," said Dave Eckerson, Chief Human Capital Officer for USAID.

Several major revisions to the AEF were made. For example, there are now six generic performance elements for all employees: 1) Technical Expertise; 2) Planning and Organizing Work; 3) Execution of Duties; 4) Communications; 5) Professionalism and Teamwork; and 6) Customer Service. Rating officials' written narratives about employees must link performance elements to specific Agency goals and organizational unit strategic objectives.

The new evaluation system, approved by the BTEC in November 2002, was recently finalized after negotiations were completed with representatives of the American Federation of Government Employees (AFGE).

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Minutes of the BTEC meetings can be found on the BTEC website at <http://inside.usaid.gov/BTEC/>



**The next BTEC meeting is scheduled for April 13th.**