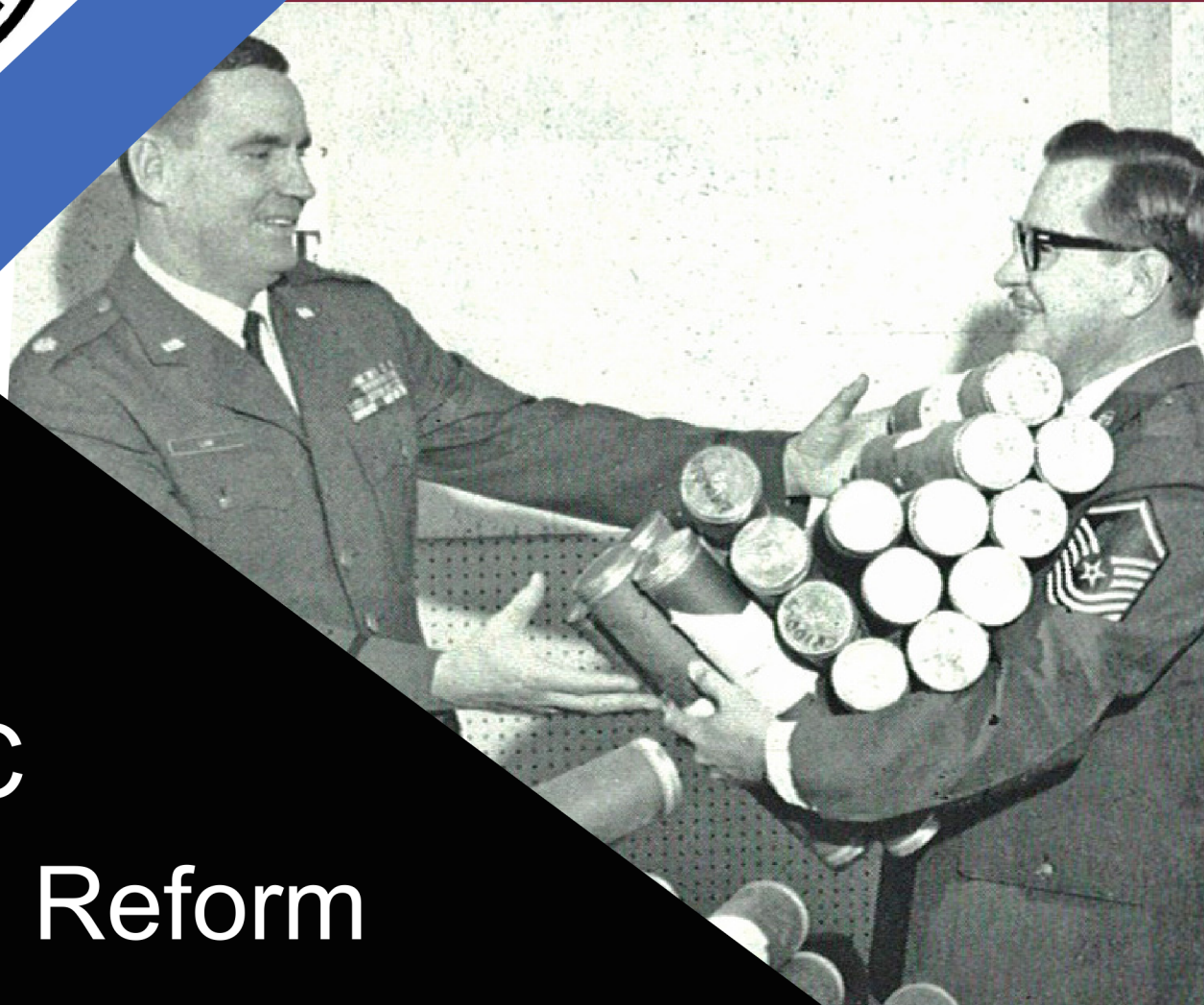


JANUARY 2023



ASMC
PPBE Reform
**INFORMATION
TOOLS & SYSTEMS**

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American Society of Military Comptrollers

ASMC is the non-profit educational and professional organization for persons, military and civilian, involved in the overall field of defense financial management (FM). ASMC promotes the education and training of its members and supports the development and advancement of the profession of defense FM. The Society provides professional programs to keep members abreast of current issues and encourages the exchange of information, techniques, and approaches.

ASMC's mission is to promote thought leadership, professional development, and ethical behavior in all aspects of defense FM. Our vision is to be the premier organization bringing people together in advancing thought leadership, professionalism, and ethics within the national security financial management community.

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The ASMC PPBE Reform Task Force

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Vice Admiral Pat Tracey – U.S. Navy (Retired)

Lieutenant Colonel Neville Welch - USMC (Retired), Independent Consultant, EOP Foundation

Marisa Rhode - Vice President of Program & Budget Growth, Aeyon and Task Force Executive Secretary

EXECUTIVE SUMMARY

The Defense Warfighting Enterprise enjoys the best equipment on the planet. Our question is, do the Financial Management professionals in the Defense Business Enterprise have the best Information Technology (IT) tools and systems to support Planning, Programming, Budgeting and Execution (PPBE)? The ASMC PPBE Reform Task force set out to answer this question.

We surveyed ASMC members, the financial management professionals who operate the DoD's PPBE IT tools and systems every day. Based on their survey responses we can identify several opportunities to improve PPBE IT tools and systems.

Here are a few highlights from the survey:

- Over two-thirds of survey respondents (69.7%) state that current PPBE IT tools and systems do not allow quick assessment of how PPBE decisions will affect the latest SECDEF approved plans.
- An overwhelming 67.55% of survey respondents say that mission needs change so fast that we cannot add/change functionality in our current PPBE IT tools and systems fast enough to keep pace.
- 66.67% of respondents are routinely confronted by fragmented access to critical information when working on PPBE.
- Two-thirds (65.65%) of survey respondents say our current PPBE IT tools and systems do not deliver a consumer grade experience, as required by (Biden) Executive Order 14058.

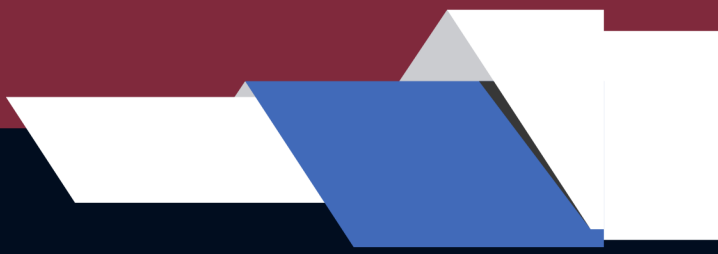
The results made it clear that current PPBE IT tools and systems aren't agile enough to support decision analysis or metrics development. PPBE IT tools and systems aren't even using consistent data or metadata.

- 65.79% of survey respondents believe that current PPBE IT tools and systems don't deliver seamless access to critical information to all stakeholders.
- 62.62% of survey respondents believe that current PPBE IT tools and systems do not enable data driven decisions at the speed of relevance.
- 63.16% of survey respondents state that current PPBE IT tools and systems do not use consistent data and metadata across all phases of PPBE.
- 61.40% of respondents believe that current PPBE IT tools and systems use inconsistent performance metrics across all phases of PPBE.

Looking across these survey responses, it's clear that PPBE IT tools and systems are a hairball of antiquated technology. It's due to the professionalism and dedication of the financial community that we can make any data-driven decisions at all.

In the prior survey, PPBE processes earned a "C grade". PPBE IT tools and systems score even worse. The Biden-Harris Management Agenda Vision calls for continuous improvement in Federal acquisition and financial management systems. It's past time we got to work modernizing PPBE IT tools and systems.

We're in the Information Age--where kinetic and non-kinetic effects matter to winning and the pace of change is accelerating. The Chinese Communist Party is modernizing their military capabilities at a faster pace than we are matching. The irony is that the business processes supporting the Chinese military facilitate their rapid purchase and deployment of US-generated technical solutions and innovation. Meanwhile, PPBE delays our own modernization. Our PPBE IT tools and systems make the modernization challenge harder than it needs to be. It's time to modernize PPBE so that it operates as an effective weapon in the context of 21st century threats and of 21st century military, technology, industry, economic, and fiscal realities.



Previews of coming attractions – The Task Force will shortly launch a survey of PPBE members on the topic of the people and culture that support PPBE. The Task Force will incorporate these survey findings into areas of discussion in our coming interviews of subject matter experts and interactions with the Legislative Committee to gain additional insight about opportunities for improvement.

Meanwhile, for more details on the current survey responses, please see the remainder of this report.

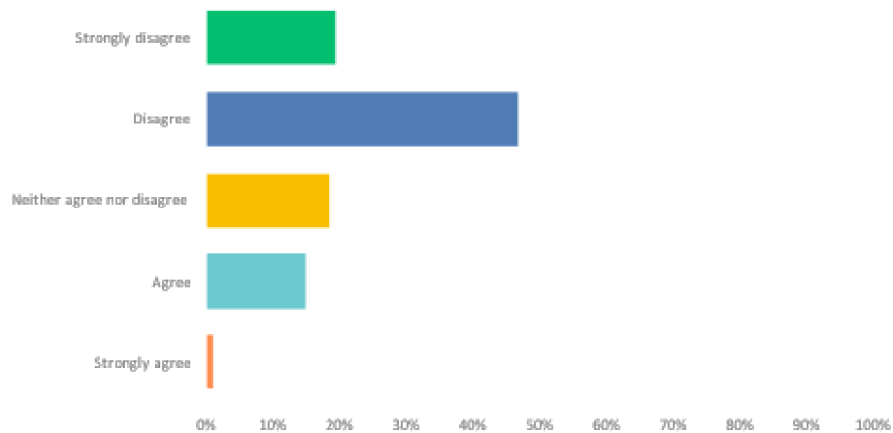
DETAILED FINDINGS

Current PPBE IT tools and systems do not allow for quick assessment of how PPBE decisions will affect the latest SECDEF approved plans.

69.7% of survey respondents disagree that our current PPBE IT tools and systems provide easy access to information that allows for quick assessment of how their PPBE decisions will affect the latest SECDEF approved plans. In contrast only 15.79% of respondents agreed that quick assessment is allowed with current PPBE IT tools and systems.

Our current PPBE tools and information systems provide easy access to information that allows me to quickly assess how my PPBE decisions will affect the latest SECDEF approved plans.

Answered: 114 Skipped: 135



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Our current PPBE tools and information systems provide easy access to information that allows me to quickly assess how my PPBE decisions will affect the latest SECDEF approved plans.

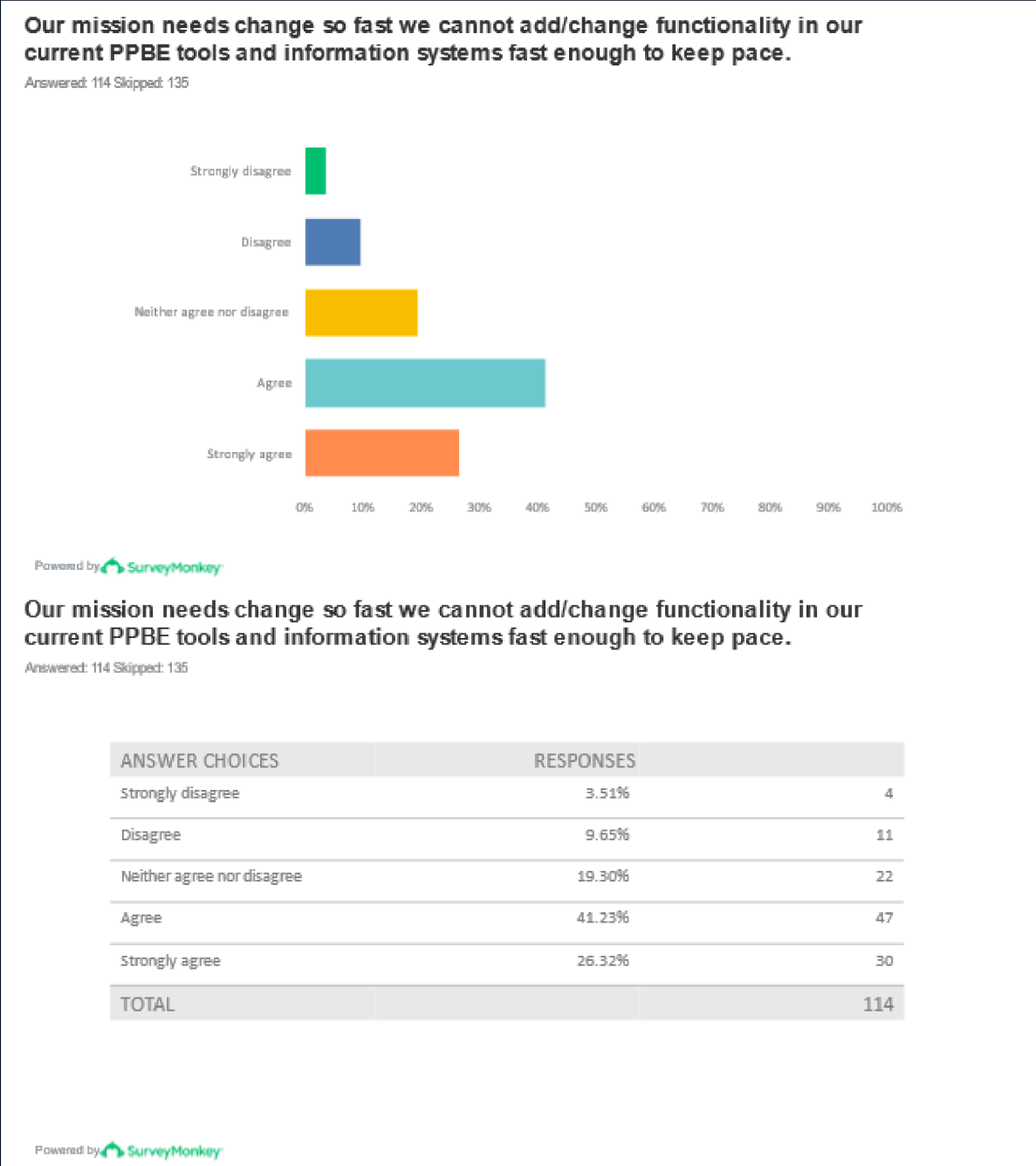
Answered: 114 Skipped: 135

ANSWER CHOICES	RESPONSES
Strongly disagree	19.30% 22
Disagree	46.49% 53
Neither agree nor disagree	18.42% 21
Agree	14.91% 17
Strongly agree	0.88% 1
TOTAL	114

Powered by SurveyMonkey

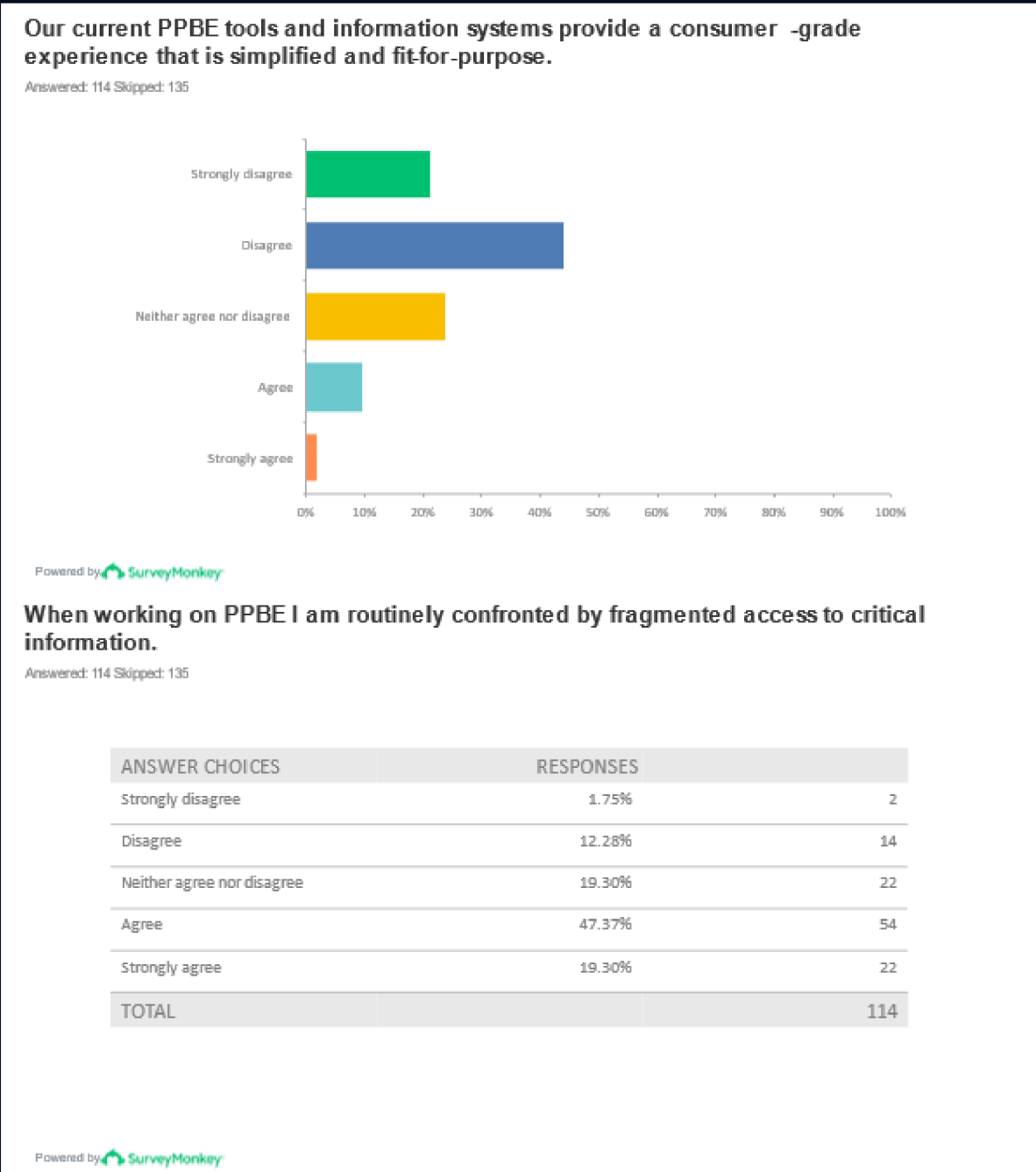
Our mission needs change so fast we cannot add or change functionality in our current PPBE IT tools and systems fast enough to keep pace.

67.55% of survey respondents agree that mission needs change so fast that we cannot add/change functionality in our current PPBE IT tools and systems fast enough to keep pace. By contrast, only 13.16% of survey respondents disagreed that mission needs change so fast that we cannot add/change functionality in our current PPBE IT tools and systems fast enough to keep pace.



Current PPBE IT tools and systems don't provide a consumer-grade experience that is simplified and fit-for-purpose.

Different DoD organizations use different PPBE IT tools and systems. While the best of those scores well, the majority do not. In fact, two-thirds (65.65%) of survey respondents say our current PPBE IT tools and systems **do not deliver** a consumer grade experience, as required by (Biden) Executive Order 14058. In a surprisingly pleasant development, **14.3%** of survey respondents enjoy the luxury of access to consumer grade tools.

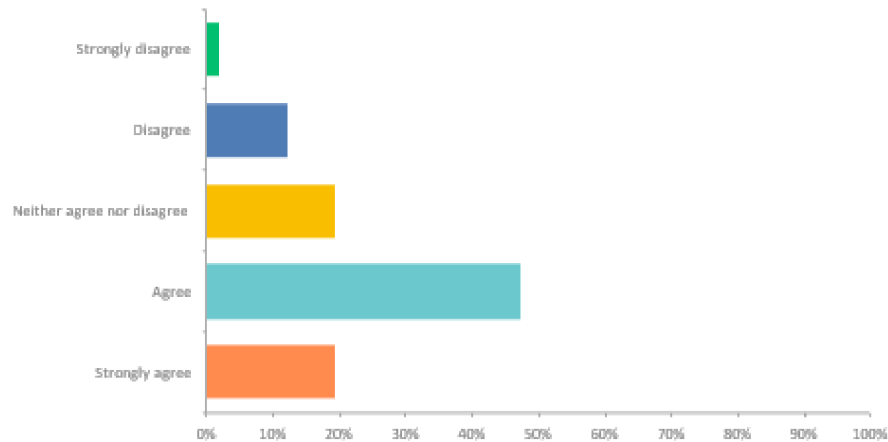


Financial Managers are routinely confronted by fragmented access to critical information when working on PPBE.

66.67% of respondents agree that they are routinely confronted by fragmented access to critical information when working on PPBE. Only 14.03% of respondents disagreed that they are routinely confronted by fragmented access to critical information when working PPBE.

When working on PPBE I am routinely confronted by fragmented access to critical information.

Answered: 114 Skipped: 135



Powered by SurveyMonkey

When working on PPBE I am routinely confronted by fragmented access to critical information.

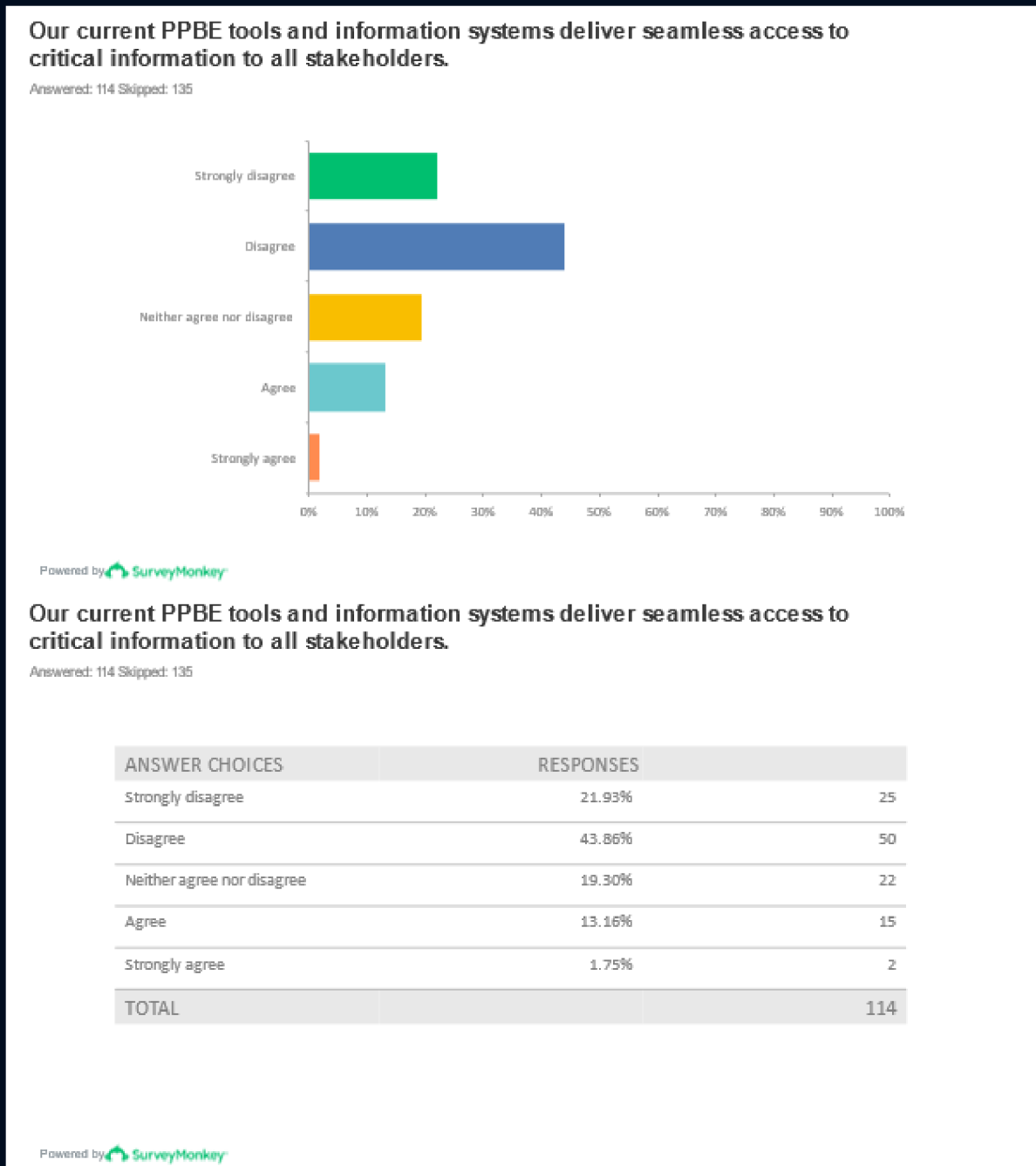
Answered: 114 Skipped: 135

ANSWER CHOICES	RESPONSES
Strongly disagree	1.75% 2
Disagree	12.28% 14
Neither agree nor disagree	19.30% 22
Agree	47.37% 54
Strongly agree	19.30% 22
TOTAL	114

Powered by SurveyMonkey

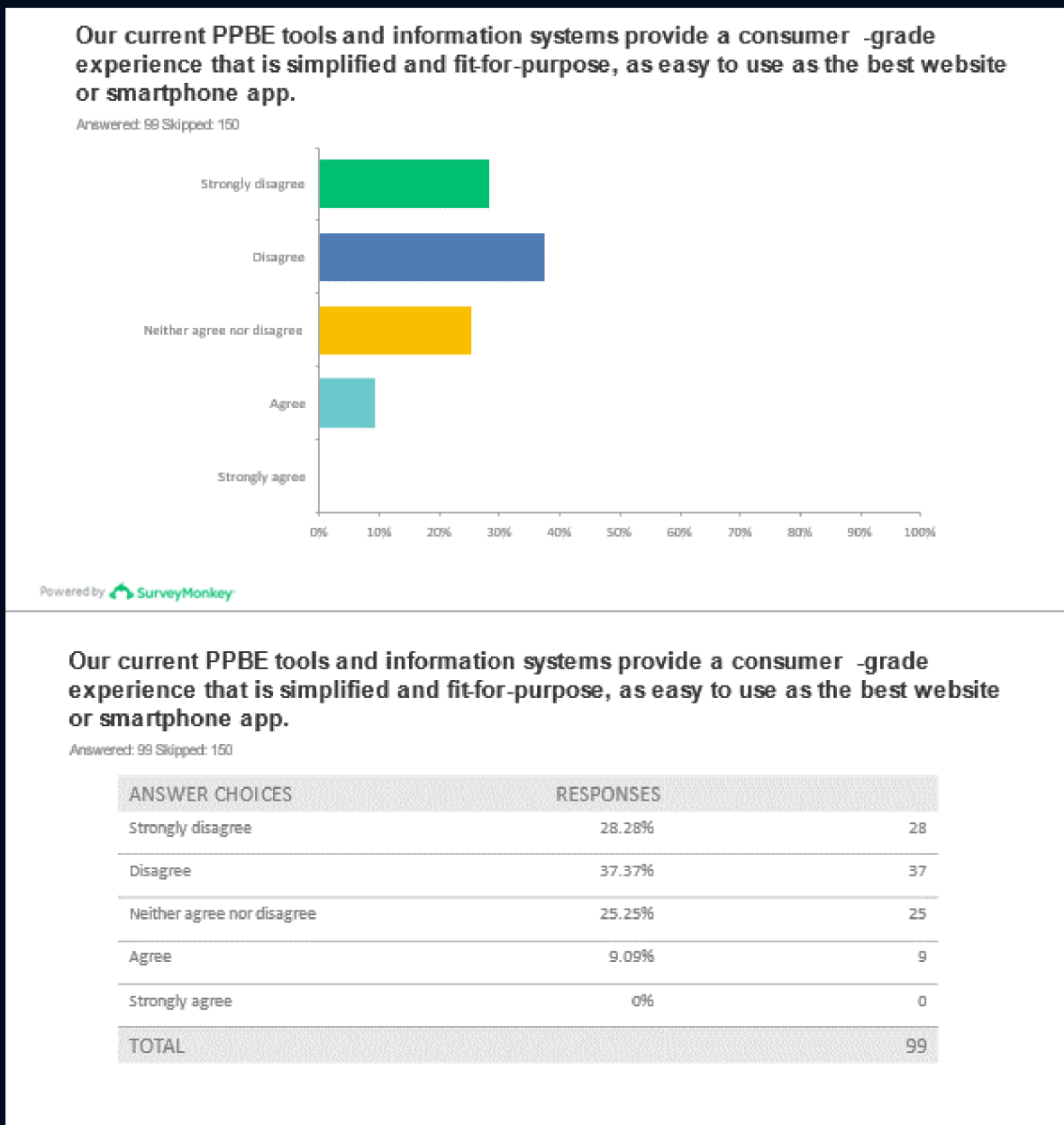
Current PPBE IT tools and systems don't deliver seamless access to critical information to all stakeholders.

65.79% of survey respondents disagreed that current PPBE IT tools and systems deliver seamless access to critical information to all stakeholders.



Current PPBE IT tools and systems don't provide a consumer-grade experience that is simplified and fit-for-purpose, as easy to use as the best website or smartphone app.

Two-thirds (65.65%) of survey respondents say that our current PPBE IT tools and systems do not provide a consumer-grade experience that is simplified and fit-for-purpose, as easy to use as the best website or smartphone app. In contrast, a minority of respondents (9.09%) believe that current PPBE IT tools and systems provide a consumer-grade experience. A quarter of respondents (25.25%) remained neutral.

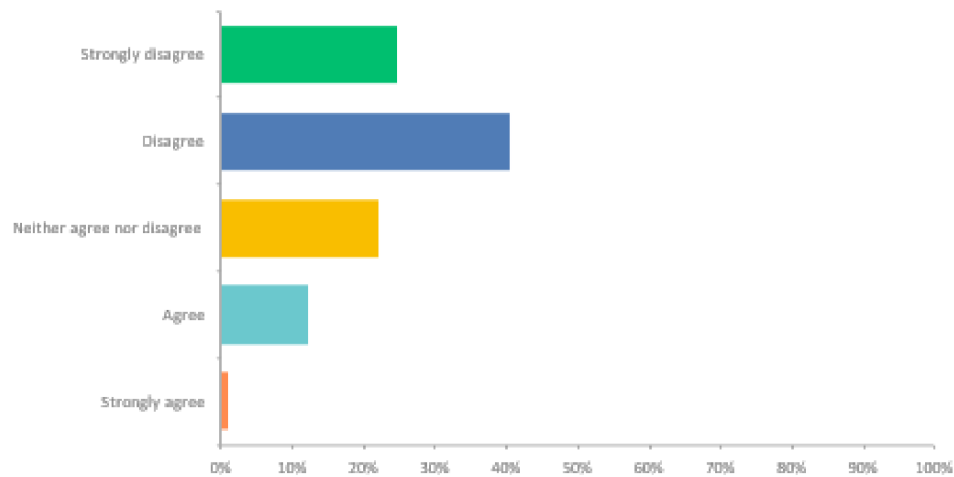


Current PPBE IT tools and systems do not enable agile, flexible resource planning and management.

64.91% of survey respondents say current PPBE IT tools and systems do not enable agile, flexible resource planning and management. In contrast, only 13.16% of respondents say current PPBE IT tools and systems enable agile, flexible resource planning and management.

Our current PPBE tools and information systems enable agile, flexible resource planning and management.

Answered: 114 Skipped: 135



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Our current PPBE tools and information systems enable agile, flexible resource planning and management.

Answered: 114 Skipped: 135

ANSWER CHOICES	RESPONSES	
Strongly disagree	24.56%	28
Disagree	40.35%	46
Neither agree nor disagree	21.93%	25
Agree	12.28%	14
Strongly agree	0.88%	1
TOTAL		114

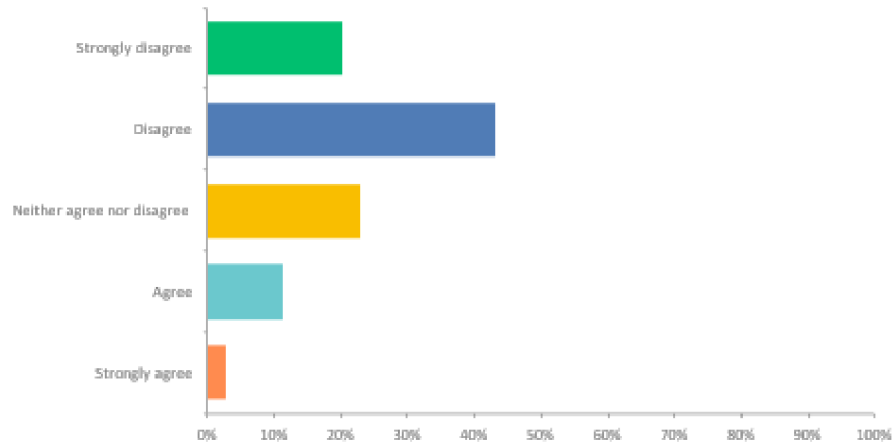
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Current PPBE IT tools and systems don't use consistent data and metadata across phases of PPBE.

63.16% of survey respondents disagreed that current PPBE IT tools and systems use consistent data and metadata across all phases of the PPBE.

The current PPBE tools and information systems use consistent data and metadata across all phases of the PPBE.

Answered: 114 Skipped: 135



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The current PPBE tools and information systems use consistent data and metadata across all phases of the PPBE.

Answered: 114 Skipped: 135

ANSWER CHOICES	RESPONSES	
Strongly disagree	20.18%	23
Disagree	42.98%	49
Neither agree nor disagree	22.81%	26
Agree	11.40%	13
Strongly agree	2.63%	3
TOTAL		114

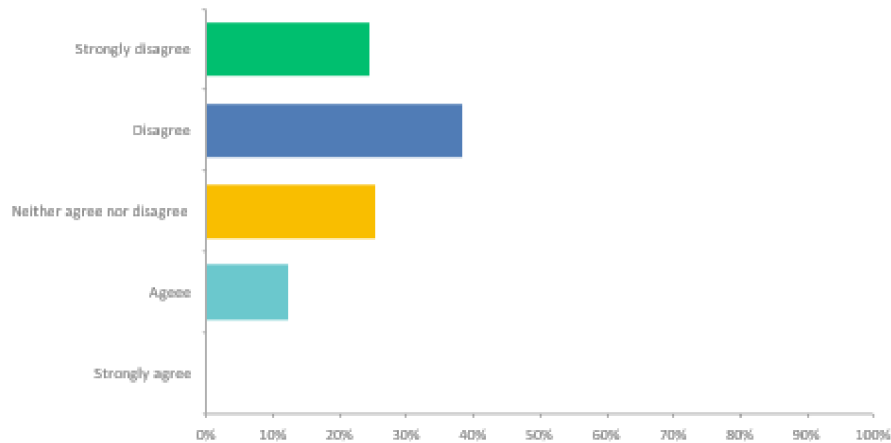
Powered by SurveyMonkey

Current PPBE IT tools and systems don't enable data driven decisions at the speed of relevance.

62.62% of survey respondents do not believe that current PPBE IT tools and systems enable us to make data driven decisions at the speed of relevance. In contrast, a mere 12.12% of respondents believe PPBE IT tools and systems enable data driven decisions.

Our current PPBE tools and information systems enable us to make data driven decisions at the speed of relevance.

Answered: 99 Skipped: 150



Powered by SurveyMonkey

Our current PPBE tools and information systems enable us to make data driven decisions at the speed of relevance.

Answered: 99 Skipped: 150

ANSWER CHOICES	RESPONSES	
Strongly disagree	24.24%	24
Disagree	38.38%	38
Neither agree nor disagree	25.25%	25
Agree	12.12%	12
Strongly agree	0%	0
TOTAL		99

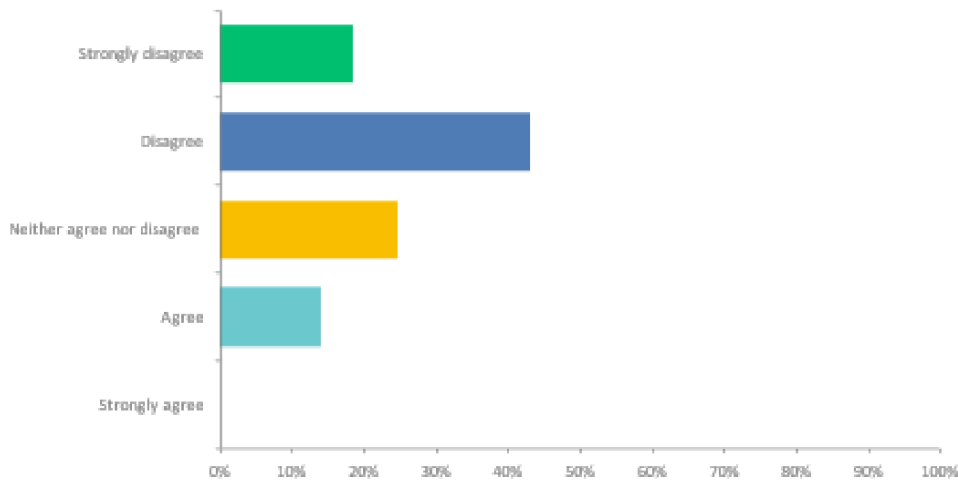
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Current PPBE IT tools and systems don't use consistent metrics across all phases of PPBE.

61.40% of respondents disagree that current PPBE IT tools and systems use consistent metrics across all phases of the PPBE.

The current PPBE tools and information systems use consistent metrics across all phases of the PPBE.

Answered: 114 Skipped: 135



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The current PPBE tools and information systems use consistent metrics across all phases of the PPBE.

Answered: 114 Skipped: 135

ANSWER CHOICES	RESPONSES	
Strongly disagree	18.42%	21
Disagree	42.98%	49
Neither agree nor disagree	24.56%	28
Agree	14.04%	16
Strongly agree	0%	0
TOTAL		114

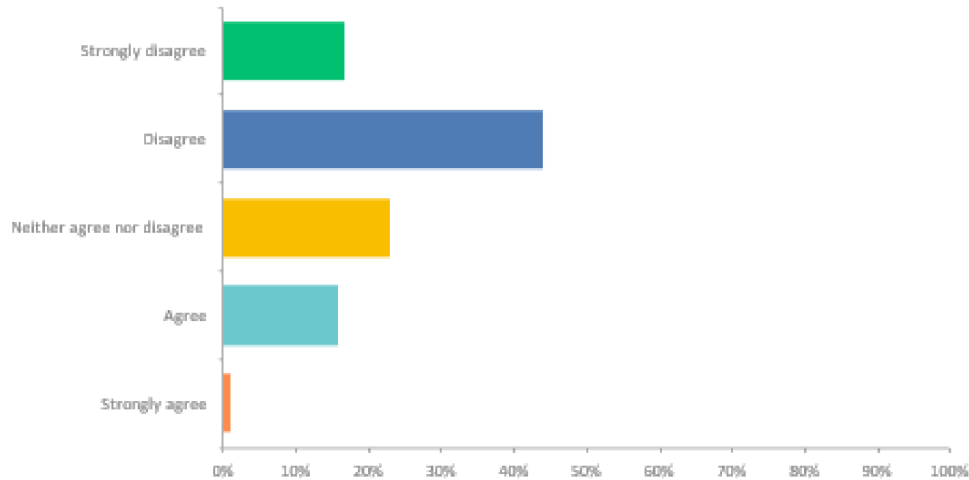
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Current PPBE IT tools and systems don't enable predictive decisions, nor trigger automated interventions.

60.53% of survey respondents disagree that current PPBE IT tools and systems enable users to make predictive decisions and trigger automated interventions.

Our current PPBE tools and information systems enable us to make predictive decisions, and trigger automated interventions.

Answered: 114 Skipped: 135



Powered by SurveyMonkey

Our current PPBE tools and information systems enable us to make predictive decisions, and trigger automated interventions.

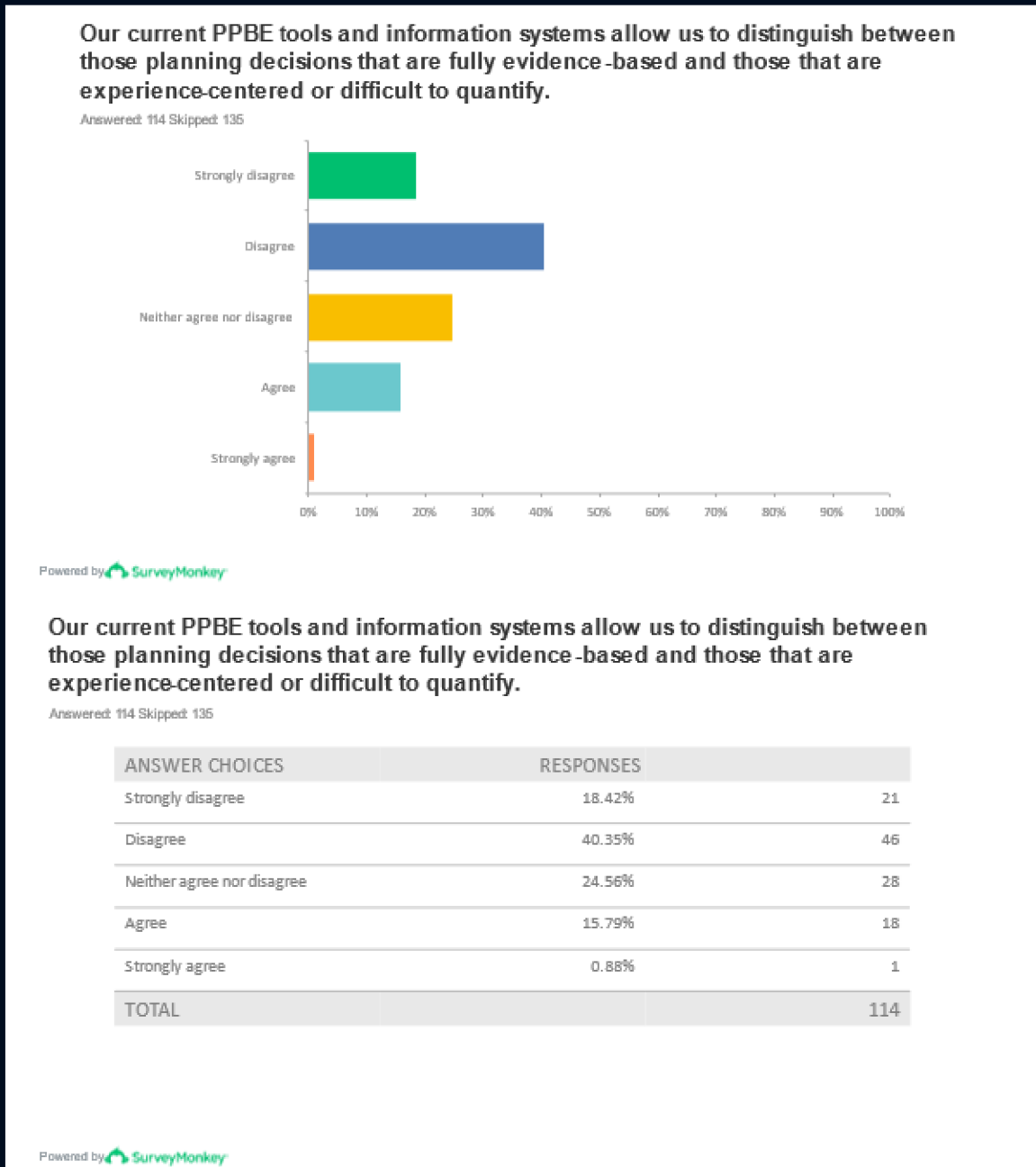
Answered: 114 Skipped: 135

ANSWER CHOICES	RESPONSES	
Strongly disagree	16.67%	19
Disagree	43.86%	50
Neither agree nor disagree	22.81%	26
Agree	15.79%	18
Strongly agree	0.88%	1
TOTAL		114

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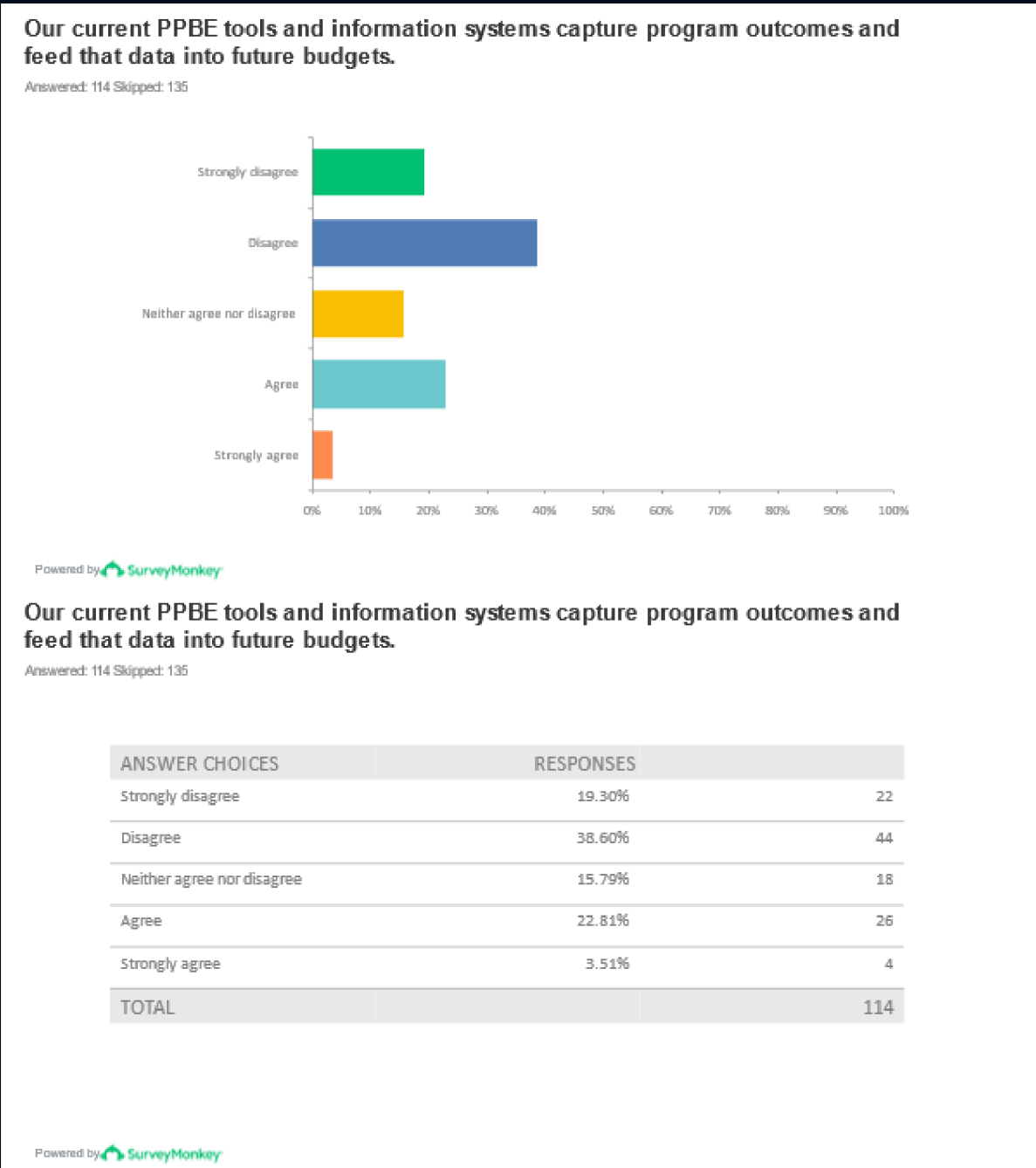
Current PPBE IT tools and systems don't allow users to distinguish between planning decisions that are fully evidence-based and those that are experience-centered or difficult to quantify.

58.77% of survey respondents do not agree that current PPBE IT tools and systems allow us to distinguish between those planning decisions that are fully evidence-based and those that are experience-centered or difficult to quantify. Existing PPBE IT tools and systems have very little support from their users, with a mere 16.67% of users agreeing with the statement.



Current PPBE IT tools and systems don't capture program outcomes nor feed that data into future budgets.

57.9% of survey respondents disagree that current PPBE IT tools and systems capture program outcomes and feed that data into future budgets. 26.32% of respondents agreed current PPBE IT tools and systems capture program outcomes and feed that data into future budgets.

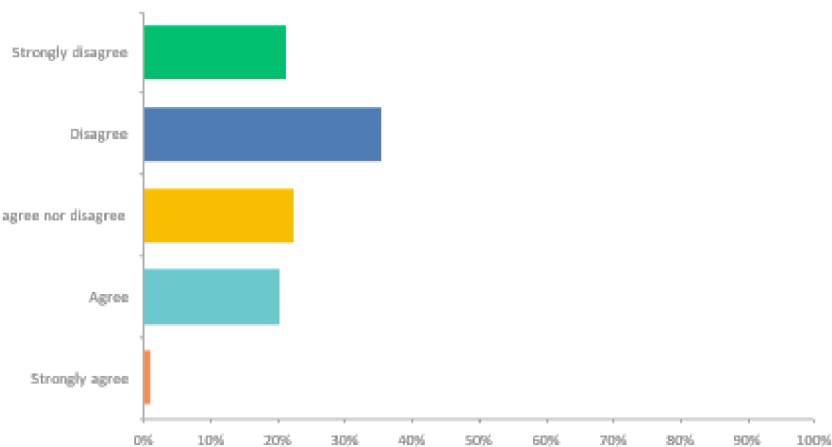


Current PPBE IT tools and systems don't enable scenario-based planning and what-if analysis, nor make results easily accessible to decision makers.

56.56% of survey respondents believe that current PPBE IT tools and systems do not enable scenario-based planning and what-if analysis and make results easily accessible to decision makers. Conversely, only 21.21% of respondents agreed that PPBE IT tools and systems enable scenario-based planning and what-if analysis that make results easily accessible to decision makers

Our current PPBE tools and information systems enable scenario -based planning and what-if analysis and make the results easily accessible to decision makers.

Answered: 99 Skipped: 150



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Our current PPBE tools and information systems enable scenario -based planning and what-if analysis and make the results easily accessible to decision makers.

Answered: 99 Skipped: 150

ANSWER CHOICES	RESPONSES	
Strongly disagree	21.21%	21
Disagree	35.35%	35
Neither agree nor disagree	22.22%	22
Agree	20.20%	20
Strongly agree	1.01%	1
TOTAL		99

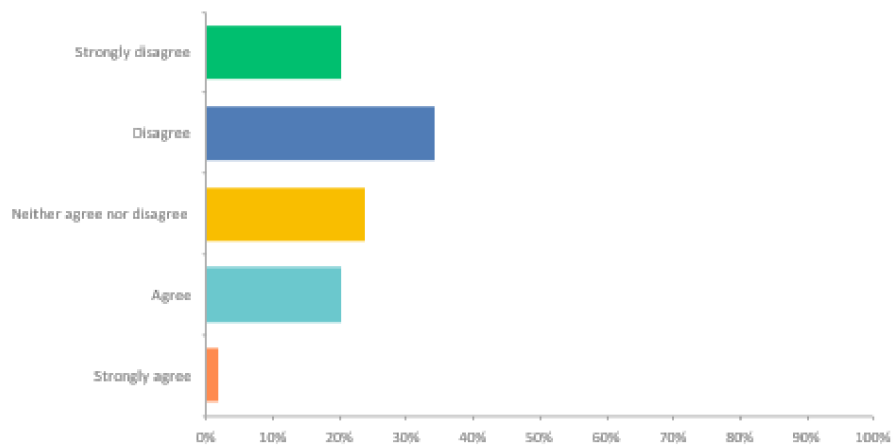
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Current PPBE IT tools and systems are not effective or easy to use.

54.39% of survey respondents say that our current PPBE IT tools and systems are neither effective nor easy to use. By contrast, 21.93% of respondents feel that current PPBE systems and tools are effective and easy to use. Recall that the answer demographics show respondents have 15 or more years of experience with these systems.

Our current PPBE tools and information systems are effective and easy to use.

Answered: 114 Skipped: 135



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Our current PPBE tools and information systems are effective and easy to use.

Answered: 114 Skipped: 135

ANSWER CHOICES	RESPONSES	
Strongly disagree	20.18%	23
Disagree	34.21%	39
Neither agree nor disagree	23.68%	27
Agree	20.18%	23
Strongly agree	1.75%	2
TOTAL		114

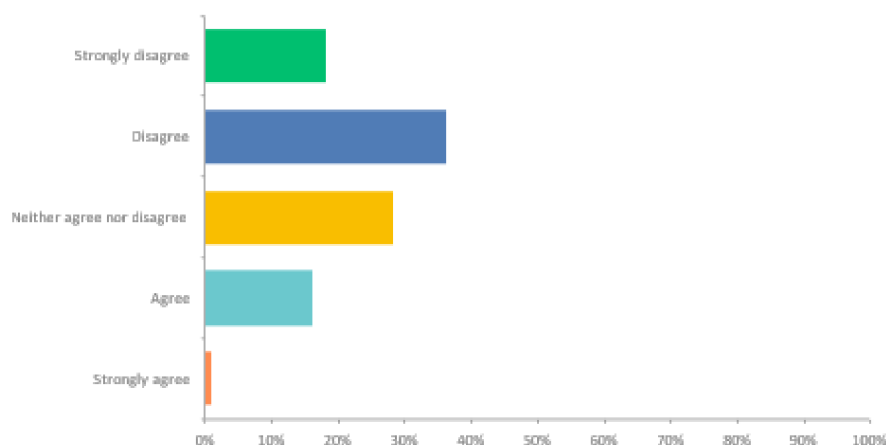
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Current PPBE IT tools and systems do not enable agile, flexible capital planning.

>54% of survey respondents disagreed or strongly disagreed that current PPBE IT tools and systems enable agile, flexible capital planning. A minority of respondents (17.17%) of survey respondents felt that PPBE IT tools and systems do enable agile, flexible capital planning.

Our current PPBE tools and information systems enable agile, flexible capital planning.

Answered: 99 Skipped: 150



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Our current PPBE tools and information systems enable agile, flexible capital planning.

Answered: 99 Skipped: 150

ANSWER CHOICES	RESPONSES	
Strongly disagree	18.18%	18
Disagree	36.36%	36
Neither agree nor disagree	28.28%	28
Agree	16.16%	16
Strongly agree	1.01%	1
TOTAL		99

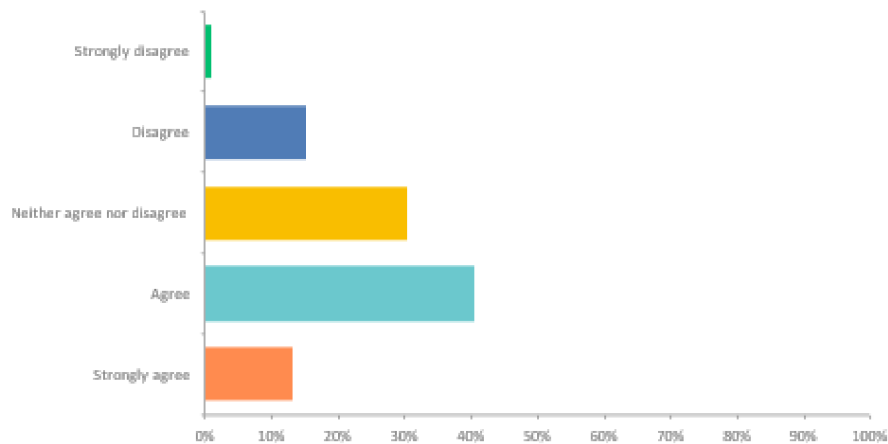
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Current PPBE IT tools and systems contain too much data and too few answers to critical business questions.

53.53% of survey respondents say that current PPBE IT tools and systems contain too much data and too few answers to critical business questions. Only 16.16% of respondents are able to find answers to critical business questions in the current PPBE IT tools and systems. 30.3% of respondents did not feel strongly enough to answer the question.

Our current PPBE tools and information systems contain too much data and too few answers to critical business questions.

Answered: 99 Skipped: 150



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Our current PPBE tools and information systems contain too much data and too few answers to critical business questions.

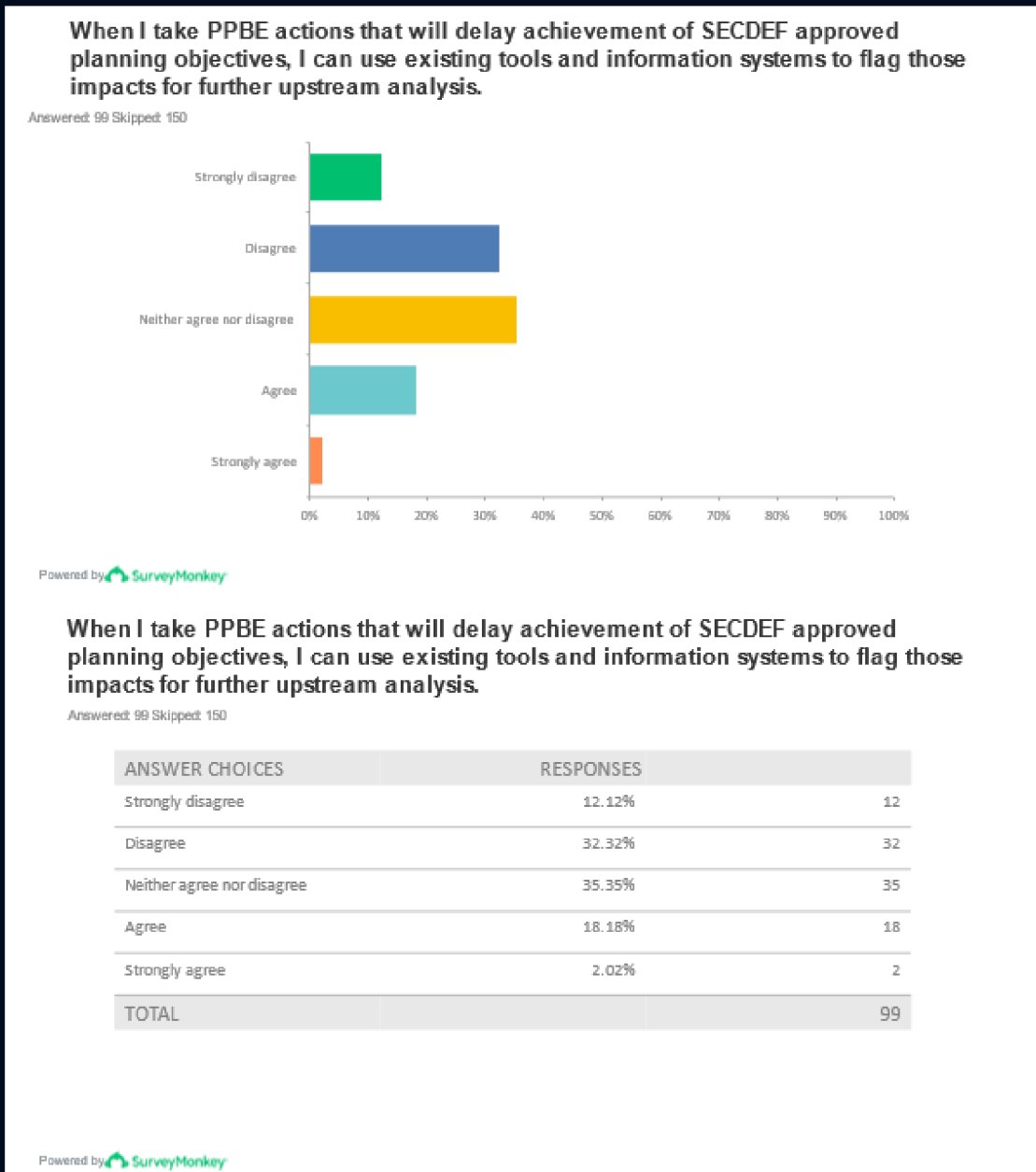
Answered: 99 Skipped: 150

ANSWER CHOICES	RESPONSES	
Strongly disagree	1.01%	1
Disagree	15.15%	15
Neither agree nor disagree	30.30%	30
Agree	40.40%	40
Strongly agree	13.13%	13
TOTAL		99

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Existing PPBE IT tools and systems can't be leveraged to flag impacts when analyzing PPBE actions that will delay achievement of SECDEF approved planning objectives.

44.44% of survey respondents feel that even when they take PPBE actions that will delay achievement of SECDEF approved planning objectives, they cannot use existing tools and systems to flag those impacts for further upstream analysis. By contrast, only 20.20% of respondents say that they can flag those impacts for further upstream analysis. A sizeable group (35.35%) did not take a clear position on the question.

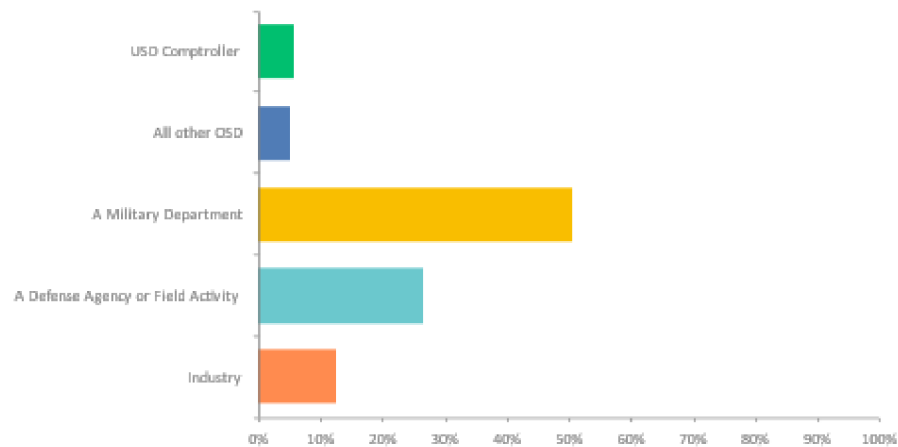


DEMOGRAPHICS

The organizational alignment of the survey respondents roughly parallels the organizational distribution of the DoD budget, with the majority operating in a Military Department. Execution, followed by Budgeting and then Audit are the most common recurring responsibilities of the respondents. The respondents have extensive career experience in PPBE. 60.24% have more than 15 years of experience and 78.71% have 10+ years of experience with PPBE.

My current organizational alignment is with (check one):

Answered: 249 Skipped: 0



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My current organizational alignment is with (check one):

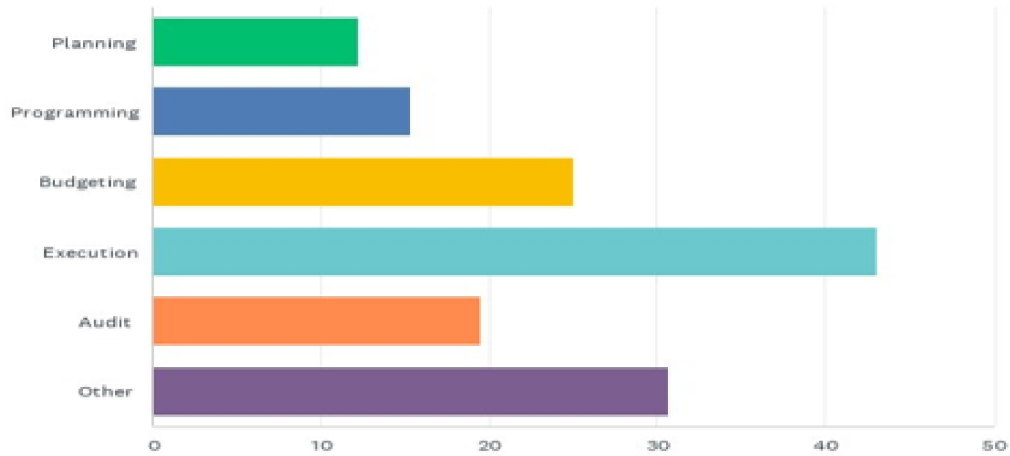
Answered: 249 Skipped: 0

ANSWER CHOICES	RESPONSES	
USD Comptroller	5.62%	14
All other OSD	4.82%	12
A Military Department	50.60%	126
A Defense Agency or Field Activity	26.51%	66
Industry	12.45%	31
TOTAL		249

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In the last fiscal year, my time and energy were distributed as follows: (Your answers should add up to 100%)

Answered: 249 Skipped: 0



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In the last fiscal year, my time and energy were distributed as follows: (Your answers should add up to 100%)

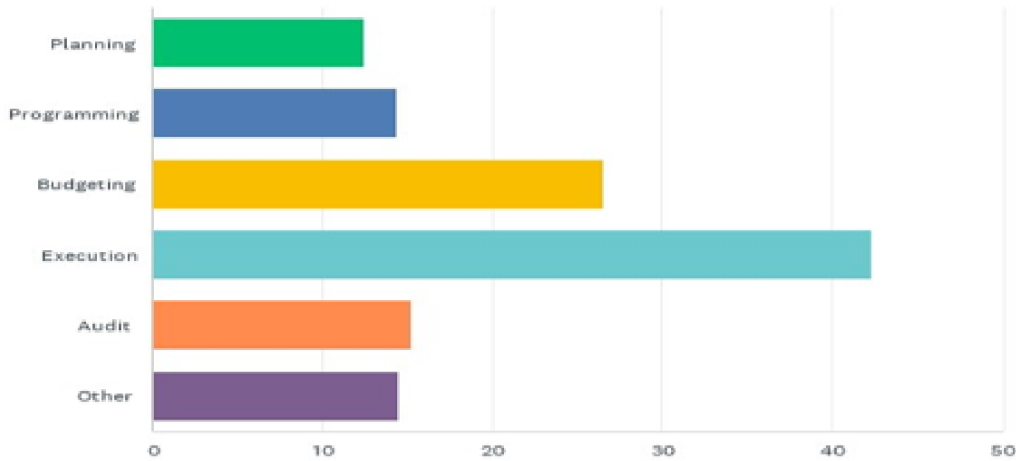
Answered: 249 Skipped: 0

ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
Planning	12	2,049	167
Programming	15	2,502	163
Budgeting	25	4,786	191
Execution	43	8,734	203
Audit	20	3,147	161
Other	31	3,682	120
Total Respondents: 249			

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Looking across my career, my work experience is distributed as follows: (Your answers should add up to 100%.)

Answered: 249 Skipped: 0



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Looking across my career, my work experience is distributed as follows: (Your answers should add up to 100%.)

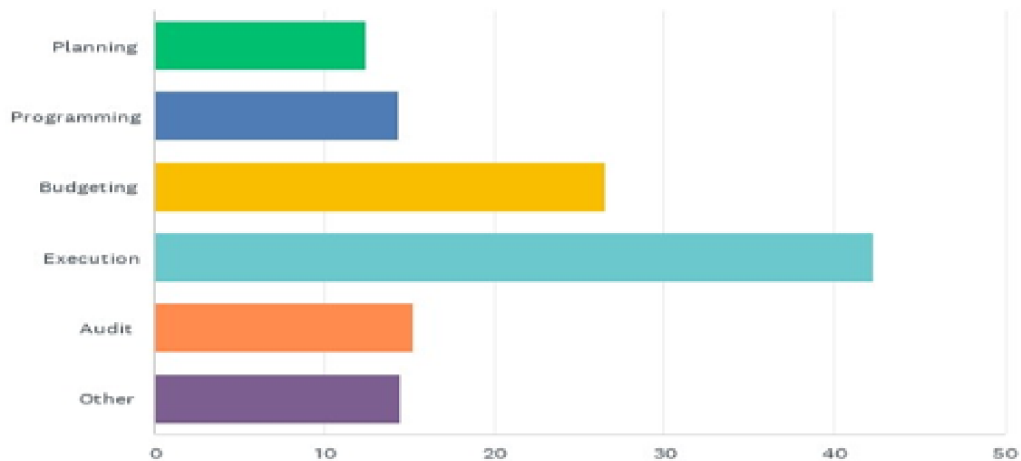
Answered: 249 Skipped: 0

ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
Planning	12	2,201	177
Programming	14	2,772	192
Budgeting	27	5,887	222
Execution	42	9,661	228
Audit	15	2,727	179
Other	14	1,652	114
Total Respondents: 249			

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Looking across my career, my work experience is distributed as follows: (Your answers should add up to 100%)

Answered: 249 Skipped: 0



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My professional experience with PPBE adds up to a total of (pick one):

Answered: 249 Skipped: 0

ANSWER CHOICES	RESPONSES	Count
0-5 years	8.84%	22
5-10 years	14.06%	35
10-15 years	16.87%	42
15-20 years	18.47%	46
20+ years	41.77%	104
TOTAL		249

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