Coordination is Still the Key!

- Shelly McAllister- OMB/BRD/BCB
- Stephen Clapham- HHS/ASFR/FLR
- Tricia Hall- DOI/IOS
“best practices and tips for smooth operations throughout the year”

• What does “smooth” look like?
• Traits of good coordinators
• How do they do it?
• Opportunities abound!
What does “smooth” look like?

• How much time is spent correcting errors?
• Reinvent the wheel how many times?
• How much stress is generated by uncertainty?
• Missed deadlines?
• Constant crisis mode?
• Process overrides substance?
Traits of good coordinators

• Typically high level non-supervisory analyst; a leader (not a “Leader”)
• Resourceful
• Organized
• Communicate, communicate, communicate
• Shares
• Knows who does what, extensive contacts
How do they do it?

- Lots of “favorites” – links to laws, reports, etc.
- Recurring vs. non-recurring
- Known knowns
- Meeting notes
- Map out/diagram decisions & processes
- Checklists!!!!!
Technological Solutions

• MAX
  – Collaboration Groups
  – Community
  – Collect

• SharePoint

• Listserves
Non-Technological Solutions

• Big Rolodex (not actual paper)
  – Organize by function
  – Get “close enough”

• Cast a wide net

• Teasers
  – Start with the TL:DR
Budget Season MAX A-11 Agency User Checklist**

 ✓ Who provides FTE numbers? ________________
 ✓ Who provides object class numbers? ________
 ✓ Who provides character class/investment/grants numbers? __________
 ✓ Do you know which accounts are assigned to you?
 ✓ Do you have access to all your accounts?
 ✓ Who is your GTAS reporter? ________________
 ✓ Who knows what the CY discretionary appropriation is? (remember: CR, ATBs, rescissions, etc.) ________________
 ✓ Who provides stream of mandatory BA and outlays? __________
 ✓ Who provides stream of collections? ________
 ✓ Are you a watcher of BDR page?]
 ✓ Develop good relationship with OMB examiner and/or agency MAX A-11 coordinator.
 ✓ Check with DATA Act coordinator for “obligations by program activity” reporting.
 ✓ Review the GTAS control totals.
 ✓ Create a MAX A-11 training class for newbies.
 ✓ Find out what your office’s internal processes are; create where missing.
 ✓ Save “master” version as an “alt” file.
 ✓ Make dashboard a favorite. https://community.max.gov/x/6hpsK
 ✓ Have you updated your own checklist?
• Questions?