THE BUDGET ANALYST

Name: Penny Moore **Age:** 57 **Occupation:** Analyst, OMB **Location:** Downtown and telework from Falls Church, VA

Penny has been with OMB for 18 years; having started at HHS as a program manager. She's widely respected for her deep understanding of the Federal budget.

She has a husband and two teenage daughters. Penny raises money for the National Kidney Foundation each year and brings her lunch to work.

" *I need clear insights into how an agency distributed last year's allocation in order to review this year's request.* "
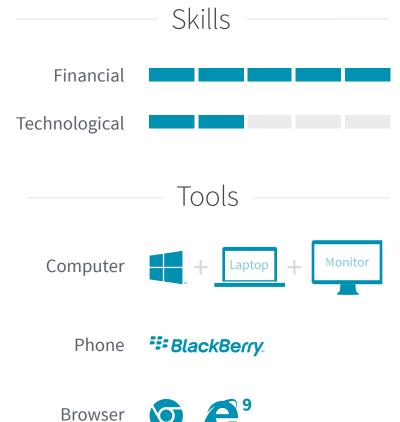
Goals & Tasks

- Analyze agency budget requests

- Compare budget requests with historical spending . Compare spending for like purposes across agencies

- Reconcile agency requests against the Congressional budget

- Answer questions re: outlays vs. allocations

Attitudes & Motivations

- Needs every line of the President's budget to stand up to Congressional inquiry—it must be both accurate and justifiable

- Feels accountable to the American taxpayer

- Conscious of the political environment and the level of Federal spending

Pain Points

- Subcontract and sub-award information is poor

  - Program and agency listings are too broad

  - Cannot track to a meaningful expenditure level

- Penny's eyesight has weakened in recent years due to kidney disease so she has trouble reading small font sizes

Skills

Financial

Technological

Tools

Computer Windows + Laptop + Monitor

Phone BlackBerry

Browser Chrome e⁹

Software Excel

Design Implications

- Move toward mandatory reporting of sub-awards (required fields)

- Visualizations could identify or highlight data inconsistencies or variances in trends

- To compensate for her vision loss, Penny zooms in views and often prints pages to review them up close

- Support rich array of comparisons (see goals