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EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF MANAGEMENT AND BUDGET
WASHINGTON, D.C. 20503

BULLETIN NO. 78-1

October 11, 1977

TO THE HEADS OF EXECUTIVE DEPARTMENTS AND ESTABLISHMENTS

SUBJECT: Assessment of Zero-Base Budgeting

1. Purpose. This Bulletin covers the preparation of responses to a questionnaire on the evaluation of zero-base budgeting (ZBB).

2. Background. One of the major goals of the Administration is to insure that an effective zero-base budgeting system is established in the Federal Government. At this time, 1979 budget requests have been prepared using zero-base budgeting methods and have been submitted to the Office of Management and Budget (OMB).

Information on how ZBB operated within the agencies is now required so that a Government-wide assessment of this year's performance can be prepared and the need for future modifications can be considered.

3. Material required. The attached questionnaire covers the period through September 1977, when the 1979 budget requests were formulated and submitted to OMB. Agencies should submit two copies of the responses by November 11, 1977.

4. Inquiries. Inquiries should be directed to the OMB program division responsible for reviewing the agency's budget estimates or to the Budget Review Division (395-3830 or 395-3144).

James T. McIntyre, Jr.
James T. McIntyre, Jr.
Acting Director

Attachment

ATTACHMENT
Bulletin No. 78-1

Evaluation of Zero-Base Budgeting

A. Structure of the process.

1. How many decision units were identified for internal review? How many internal decision packages were prepared? What level in the agency organization structure do these decision units represent?
2. Were internal decision units consolidated for submission to higher levels in the agency?
3. Are there plans to raise or lower the decision unit level (e.g., into field offices) next year? Will the decision unit structure be altered otherwise next year? What is the agency's expected number of internal decision units and packages for next year?

B. Preparation and review of ZBB materials.

4. What was the role of the central budget office in the ZBB process? Describe particularly any involvement in setting objectives, ranking, and evaluation, etc.
5. Did the analysis of alternative methods of achieving decision unit objectives result in any of the alternative methods (to the current method) being recommended for funding for the budget, or for more study later on? Provide specific examples.
6. Did the emphasis on objectives result in:
 - identification of more and/or more clearly defined objectives? Explain.
 - better (easier) analysis and decisionmaking? Explain. What action is being taken to improve the setting of objectives?
7. What guidelines were provided for the identification of minimum levels? Describe any particularly good methods of developing minimum levels that may be of assistance to other agencies.

8. Within a decision unit, were intermediate decision packages developed to bridge between the minimum and current levels? If not, did the packages still give higher management levels meaningful increments to consider?

C. Ranking process.

9. Describe the ranking process used at each subordinate organizational level and at the top agency level. Describe any aspects of the process (e.g., use of criteria, ADP, management committees) that may be of assistance to other agencies.

D. Analysis of the process.

10. Did the total volume of budget justification material vary significantly from last year? If the answer is "yes", approximately what percentage less or more was required? Explain if a change in volume is expected next year and why.
11. In what ways, if any, did the ZBB process hinder or facilitate the consideration of major issues?
12. Did the ZBB process involve more managers to a greater extent in the budget process? If yes, describe the effect of this.
13. Was ZBB an aid in identifying trade-offs within or between programs or activities? If "yes", explain how. If no, explain why.
14. Describe specific instances of savings or improvements attributable to ZBB.
15. Describe specific programs or activities where the ZBB process was particularly effective and those where it did not seem to work as well. In this regard, summarize any conclusions drawn concerning the applicability of ZBB next year.
16. Was the staff sufficiently trained in ZBB? If not, what plans are there to ensure that adequate training will be provided to the staff prior to the start of the 1980 budget cycle?

17. What changes, if any, should be proposed in the content or format of the decision unit overviews, decision packages, or ranking sheets? How should other portions of OMB Bulletin 77-9 or the appropriate portions of Circular No. A-11 be revised for next year?
18. Include any further comments, including suggestions for changes in the process that have resulted from this first year's experience.