COURSE SYLLABUS

Federal Budget Analysis Using Microsoft Excel Course

Learn to conduct performance-based budget analysis and visualization using advanced Excel tools tailored to federal budgeting needs.

> Group classes (Live Online) and onsite training are available for this course. For more information, email onsite@graduateschool.edu or visit: https://sdfm.graduateschool.edu/courses/federal-budget-analysis-using-microsoft-excel



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Course Outline

Module 1: Conducting Analysis in Today's Budgeting Environment

- Explore the performance-oriented budgeting framework and its legal foundations
- Review key OMB Circulars (A-11, A-136) and GPRA Modernization Act requirements
- Define and apply performance measures for inputs, outcomes, and efficiency

Module 2: Structured Approach for Performance Analysis

- Understand and apply the five-step structured analysis process
- Define analysis questions, identify and collect data, and conduct Excel-based evaluations
- Utilize Excel for linking data across worksheets and visualizing results

Module 3: Monitoring Budget and Program Execution

- Apply analytic methods to monitor execution of performance budgets
- Use Excel tools like sparklines, ratios, and trend analysis
- Generate reports using SF 133 and SBR formats for quarterly reviews

Module 4: Formulation of Performance Budget Requests

- Estimate O&M and capital investment costs using Excel functions
- Conduct life-cycle cost and net present value (NPV) analysis
- Use OMB guidance (A-11, A-94) for developing justifications

Module 5: Presenting Analytic Results: Capstone Exercise

- Prepare compelling performance-based budget justifications
- Create Excel-linked Word summaries and PowerPoint visuals
- Translate analytic results into a narrative that supports budget decisions