

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 in Live Online and onsite training is 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