Air Force Business Rules for

Summer Execution Review 2023

Objective

The goal of Summer Execution Review is to protect Air Force Total Obligation Authority (TOA) through two mechanisms:

1. Review current and prior-year program execution to identify possible sources for AF and SAF/AQ priorities
2. Prepare under-executing programs for OSD INV-001 Under-execution Review drill by realigning funding and/or building reclamas to protect funding

Governance & Principals

SAF/AQX, SAF/FMB, and AF/A8P will chair the Summer Execution Review. Tri-Chair Principals:

SAF/AQX – Mr. William Bailey, SES/Mr. Mark Murphy, SES

SAF/FMB – Ms. Teresa Bickett, SES/Ms. Natalie Osgood, GS-15

AF/A8P – Mr. Gregory Parker, GS-15

Program Review

1. **Purpose:** This event serves as a tool to identify reprogramming events and potential marks/rescissions to the President’s Budget
2. **Rules of Engagement:**
   1. **8 May to 12 May 2023:** CFOs ensure all spend plans are updated to reflect to-date obligations and expenditures
   2. **15 May to 25 May 2023:** AQXE, FMBI and A8P review programs with current year INV-001 risk, as well as prior year (FY21 & 22) available funds and make initial recommendations for corrective actions to protect AF TOA. All inputs must be captured in the “FY23 SER Inputs” MS List. The review criteria include:
      1. All ACAT I, Major MTA and SAF/AQ Priority programs (need to look at everything)
      2. Programs at risk of a FY25 OSD INV-001 adjustment or Congressional marks/rescissions due to under-execution in the active years (FY23 Procurement obligations and RDT&E Expenditures measured against OSD goals and CCaR Approved data)
      3. Previously reviewed SPR programs and watch items
      4. Programs with significant reported cost/schedule/performance/funding concerns
      5. Programs with substantial execution events (e.g., contract awards) projected in 4QFY23
      6. Analyst will need to track sources submitted to the OMNIBUS; CFOs must be prepared to provide obligation/expenditure plan if sources are rejected and provide an alternate source(s)
   3. **30 May to 9 Jun 2023:** AQXE, FMBI and A8P work with CFOs to fine-tune corrective actions and build “Initial Tri-Chair Outbrief” reflecting recommendations
      1. Briefing will include draft reclama language
      2. CFOs must ensure PEO concurrence by NLT **6 Jun 2023**
   4. **14 Jun 2023:** Analysts brief Tri-Chair, with support from FMBI, A8 and CFO counterparts
   5. **14 Jun to 23 Jun 2023:** AQXE, FMBI, A8P and CFOs finalize Tri-Chair recommendations; any adjustments required, as a result of the Initial Tri-Chair Outbrief, will be updated in preparation for “Final Tri-Chair Outbrief” - slides due by COB **23 Jun 2023**
      1. Program-specific briefs will only occur by exception (upon Tri-chair request)
   6. **26 Jun 2023:** AQXE provides Final Tri-Chair Outbrief read-ahead material
   7. **28 Jun 2023:** Analysts brief Tri-Chair, with support from FMBI, A8 and CFO counterparts
3. **MS List Instructions:**
   1. Instructions will be provided via email when the “FY23 SER Inputs” list is open to CFOs

Administrative

1. **SharePoint Link:** [06. FY23 SER](https://usaf.dps.mil/sites/SAFAQ/dir/integration/enterprise%20execution/Program%20Reviews/Forms/AllItems.aspx?FolderCTID=0x010100DBED934BA851604E8079946A36FA3D6C&id=%2Fsites%2FSAFAQ%2Fdir%2Fintegration%2Fenterprise%20execution%2FProgram%20Reviews%2FCY23%20Summer%20Execution%20Review&viewid=d3f3968f%2D9dc8%2D488b%2D92a8%2D707184c0b9da)
2. **Analysts:**

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| **Portfolio** | **ACS** | **Weapons** | **Bombers** | **F&AA**  **JSF** | **Mobility & Training** | **PE** | **ISR/SOF** | **C3I&N** | **Strategic Systems**  **NC3** | **BES**  **Digital** | **AFTEO** |
| **Supported Capability Directorate** | AQP | AQP | AQP | AQP | AQQ | AQP | AQQ/AQI | AQI | AQP | AQI | AQR |
| **AQXE Analyst** | Mr. Steven Kirkbride | Maj Kyle Chapman | Lt Col Tyler Awakuni | Dr. Odette "KO" St Onge | Mr. Jamie Marsh | Mr. Steven Kirkbride | Lt Col Tyler Awakuni | Mr. Steven Kirkbride | Ms. Tiffany Bray | Dr. Odette "KO" St Onge | Mr. Jamie Marsh |
| **FMBI Analyst** | Ms. Jenny Brakel | | | Ms. Jennifer Chapman | | | Ms. Stephanie Atalig | Ms. Candace Anthony (Ms. Stephanie Atalig) | Ms. Candace Anthony (Mr. Paul Cook) | Mr. Paul Cook | |