Designed to Meet the Latest Government Financial Management Mandates!



FINANCIAL MANAGEMENT FOR GOVERNMENT

2005-2006 OFFERINGS

Transparency...Accountability... Integrity...and Performance in Government

Earn Continuing Professional Education (CPE) Credits!

TRAINING

CONSULTING

CERTIFICATION

RESEARCH

AGA

The Performance Institute

A Nationally Accredited Provider of Government Financial Management Training

Transferring Knowledge to Transform Government

www.PerformanceWeb.org

"Financial data integration currently produces accurate and timely financial information that is used by management to inform decision-making and drive results in key areas of operations."

- Office of Management and Budget, 3/10/05

Table of Contents

Financial Management Mandates in Government 2
Financial Management Solutions 3
Training 4
Open Enrollment Courses 4
Financial Management Certificate Program 6
Consulting 8
Detailed Course Agendas 10
Financial Management National Events 28
Other Institute Offerings 29
About The Performance Institute 30
Registration Information 31

The NEW Government Financial Mandates...

Performance and Accountability Reports
Financial statements must now integrate financial information with performance results to provide more comprehensive and accountable reports on government programs.

Improved Internal Controls
In the wake of Sarbanes-Oxley, government financial management has embarked on its own efforts to assess, improve, manage and report internal controls for all financial transactions and processes. OMB Circular A-123 and new GASB standards reinforce the emphasis on improved internal controls.

Cost Accounting and Management
Moving beyond object-class budgeting and accounting, government programs are now being asked to calculate, report and analyze "full cost" of unit service and unit activity to benchmark and compare efficiencies in government management.

Budget-Performance Integration
Performance-based budgeting is on the rise at the federal, state and local levels as budget decisions are increasingly being driven by performance measures integrated into program budget justifications.

Performance Auditing
Auditors are now required to examine the quality of program performance information being reported to decision makers to ensure it meets new integrity standards.

Speciality Accounting
A myriad of new performance accountability mandates have been promulgated for accounting and financial reporting for grants programs, debt management, asset management, enterprise/special funds accounting, capital funds, etc.

Accelerated Reporting
From the federal level to state and local agencies, financial managers are being asked to provide more timely financial reports and to close their books within 45 days after the fiscal year. Accelerated reporting is putting more timely financial information in the hands of managers…but is challenging financial management systems.

What Core Competencies Are Needed to Manage Financial Performance in Government?

The Performance Institute has developed a comprehensive financial management training program designed exclusively for government financial managers. The courses are offered year-round at scheduled training events and to agencies that wish to bring the training on-site. Each course is taught by an expert facilitator who brings a wealth of experience and knowledge to each training session.

FINANCIAL AND PERFORMANCE REPORTING

- The New Role of Financial Management in Government
- Financial Reporting in Government
- Performance Reporting in Government

PROGRAM PERFORMANCE

- Developing and Using Performance Measures in Government
- Program Evaluation and Analysis
- Strategic Planning in Government
- Balanced Scorecard Measurement and Management in Government
- Auditing and Improving Performance Information
- Performance-Based Grants Management

FINANCIAL PERFORMANCE

- Internal Controls: Establishing, Assessing and Managing
- Internal Controls: Correcting and Reporting
- Auditing and Reducing Erroneous Payments in Government
- Cost Accounting Management (ABC)

BUDGET PERFORMANCE

- Performance-Based Budgeting in Government
- Federal Budget Process: Formulating, Justifying and Executing
- IT Capital Planning and Investment Management
- Improving IT Budget Justifications
- Advanced Performance-Based Budgeting

Choose From Three Training Options:

OPTION 1
Open Enrollment Courses

OPTION 2
Financial Mgmt. Certificate Program

OPTION 3
On-Site Customized Training

Government Financial Management Staff Must Receive Continuing Professional Education Credits

Continuing Professional Education Accreditation

The Performance Institute is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Nashville, TN 37219-2417. Web site: www.nasba.org

Attend Courses Specifically Designed to Meet the Latest Government Financial Management Standards

Throughout the year, The Performance Institute schedules a number of financial management courses—providing training on all of the topics covered in the Institute's financial management curriculum. Content in each training course is directly aligned to address the financial management standards being implemented in government. Each course will also update attendees on the latest mandates and hot topics from the Office of Management and Budget, Congress, the Office of Federal Financial Management and state and local governments.



Attend Publicly Offered Events on Specific Financial Management Topics

"External financial reporting can demonstrate financial accountability to the public and is the basis for investment."

- General Accounting Standards Board

Benefits of Training

With over 10,000 government managers attending more than 300 public-offered programs annually, The Performance Institute is the leader in providing training to government. In the financial management skills area alone, the Institute offers training courses on 18 separate financial management topics. You will emerge from Institute training programs with a thorough understanding of all course concepts—and poised to apply what you learned in a real and practical way in your work.

Methodology-Driven Curriculum

All Institute training courses follow a clear and refined curriculum that is driven by the latest mandates and standards for financial management in government.

Competency-Based Education

Instructional approaches in Institute training courses are geared toward enhancing participants' skills and building the competencies for financial managers in government as defined by the President's Management Agenda and the Office of Management and Budget.

Learn from the Leaders

Instructors of Institute courses are all seasoned professionals with direct knowledge and experience in government. In many cases, training programs feature government presenters from standard setting bodies (OPM, OMB, GAO, Congress, etc.), as well as case study presenters from recognized best practice government agencies.

Case Studies and Best Practices

Institute courses go beyond presenting frameworks and toolkits for addressing each topic—they also provide best practice examples and case studies from government financial leaders.

Addressing the Latest Mandates

As new mandates and requirements in financial management are set by government entities, the Institute updates its training programs to reflect the latest requirements. Each course begins by updating and training participants on the latest financial mandates and their application in government.

2005-2006 Financial Management Course Schedule

SEPTEMBER 2005

Developing and Using Performance Measures in Government
September 12-13, 2005 in Arlington, VA

OCTOBER 2005

Improving IT Budget Justifications
October 11-12, 2005 in Arlington, VA

Performance-Based Budgeting in Government
October 24-25, 2005 in Arlington, VA

NOVEMBER 2005

IT Capital Planning and Investment Management
November 3-4, 2005 in Arlington, VA

Strategic Planning in Governemnt
November 7-8, 2005 in Arlington, VA

DECEMBER 2005

Advanced Performance-Based Budgeting
December 8-9, 2005 in Arlington, VA

JANUARY 2006

The New Role of Financial Management in Government
January 2-3, 2006 in Arlington, VA

Financial Reporting in Government
January 4-5, 2006 in Arlington, VA

Auditing and Reducing Erroneous Payments in Government
January 9-10, 2006 in Arlington, VA

Balanced Scorecard Measurement and Management in Government
January 11-12, 2006 in Arlington, VA

Program Evaluation and Analysis
January 17-18, 2006 in Arlington, VA

Performance Reporting in Government
January 17-18, 2006 in Arlington, VA

Auditing and Improving Performance Information
January 19-20, 2006 in Arlington, VA

Internal Controls: Correcting and Reporting
January 19-20, 2006 in Arlington, VA

FEBRUARY 2006

Cost Accounting Management (ABC)
February 1-2, 2006 in Arlington, VA

Federal Budget Process: Formulating, Justifying and Executing
February 6-7, 2006 in Arlington, VA

Internal Controls: Establishing, Assessing and Managing
February 16-17, 2006 in Arlington, VA

Strategic Planning in Government
February 27-28, 2006 in Arlington, VA

Developing and Using Performance Measures in Government
February 28-March 1, 2006 in Arlington, VA

MARCH 2006

Performance-Based Budgeting in Government
March 2-3, 2006 in Arlington, VA

Performance-Based Grants Management
March 2-3, 2006 in Arlington, VA

APRIL 2006

IT Capital Planning and Investment Management
April 24-25, 2006 in Arlington, VA

Improving IT Budget Justifications
April 27-28, 2006 in Arlington, VA

MAY 2006

Balanced Scorecard Measurement and Management in Government
May 8-9, 2006 in Arlington, VA

Auditing and Reducing Erroneous Payments in Government
May 15-16, 2006 in Arlington, VA

The New Role of Financial Management in Government
May 15-16, 2006 in Arlington, VA

Financial Reporting in Government
May 17-18, 2006 in Arlington, VA

Internal Controls: Establishing, Assessing and Managing
May 17-18, 2006 in Arlington, VA

Internal Controls: Correcting and Reporting
May 18-19, 2006 in Arlington, VA

JUNE 2006

Strategic Planning in Government
June 26-27, 2006 in Arlington, VA

JULY 2006

Advanced Performance-Based Budgeting
July 13-14, 2006 in Arlington, VA

Performance-Based Grants Management
July 17-18, 2006 in Arlington, VA

Improving IT Budget Justifications
July 17-18, 2006 in Arlington, VA

Developing and Using Performance Measures
July 24-25, 2006 in Arlington, VA

Performance Reporting in Government
July 26-27, 2006 in Arlington, VA

AUGUST 2006

Performance-Based Budgeting in Government
August 22-23, 2006 in Arlington, VA

Cost Accounting Management (ABC)
August 24-25, 2006 in Arlington, VA

Federal Budget Process: Formulating, Justifying and Executing
August 24-25, 2006 in Arlington, VA

SEPTEMBER 2006

IT Capital Planning and Investment Management in Government
September 5-6, 2006 in Arlington, VA

Program Evaluation and Analysis
September 11-12, 2006 in Arlington, VA

Auditing and Improving Performance Information
September 13-14, 2006 in Arlington, VA

All Institute Financial Management Courses Offer CPE Credits!

CPE
CONTINUING PROFESSIONAL EDUCATION

Check Individual Course Listings for Total Credits Awarded.

CPE
CONTINUING PROFESSIONAL EDUCATION

Full Descriptions of Courses and an Up-To-Date Schedule are Located Online at:
www.PerformanceWeb.org/Training

Customize and Complete a Comprehensive Financial Management Certification Program

Many government managers are now opting to receive formal financial management certification. The Performance Institute can help you through our government financial management certificate program. Completing the training program is easy. Just attend the three "core" courses and choose and additional three "elective" courses based on topics that meet your agency's unique needs. These courses have been designed as high-quality continuing professional education (CPE) in government financial management for all interested professionals.



Enroll in the Full Certificate Program

Receive CPE Credits

The Performance Institute is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Nashville, TN 37219-2417.
Web site: www.nasba.org

Benefits of the Certificate

Advance Your Career as a Financial Manager

By completing the Institute's financial management training courses, you will receive formal recognition as a certified government financial manager trained in the latest financial management compentencies. You will also receive CPE credits to bolster your credentials.

Meet New Certification Requirements

To hold a position as a financial manager in government you must demonstrate compliance with new skills sets required by OMB and Congress. Receiving your certificate as a certified financial manager is one key way to demonstrate your skills.

Customize a Program to Fit Your Needs

Working with Institute training managers, you can select courses that will have direct application and impact to your work.

> "My entire team is new to performance accountability and budget performance integration and needed this conference!"
>
> - Joyce Weddington, Health and Human Services

Structuring a Financial Management Certificate Program

1 CUSTOMIZE YOUR PROGRAM

Call The Performance Institute to speak with a training manager to select the courses that fit your needs.

2 ATTEND CORE COURSES

- The New Role of Financial Management in Government
- Financial Reporting in Government
- Performance Reporting in Government

3 ATTEND THREE ELECTIVE COURSES

Program Performance

- Developing and Using Performance Measures in Government
- Program Evaluation and Analysis
- Strategic Planning in Government
- Balanced Scorecard Measurement and Management in Government
- Auditing and Improving Performance Information
- Performance-Based Grants Management

Financial Performance

- Internal Controls: Establishing, Assessing and Managing
- Internal Controls: Correcting and Reporting
- Auditing and Reducing Erroneous Payments in Government
- Cost Accounting Management (ABC)

Budget Performance

- Performance-Based Budgeting in Government
- Federal Budget Process: Formulating, Justifying and Executing
- IT Capital Planning and Investment Management
- Improving IT Budget Justifications
- Advanced Performance-Based Budgeting

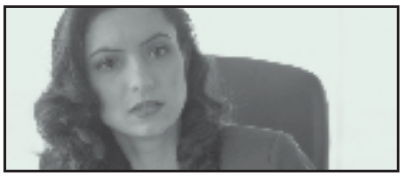
4 COMPLETE A DEMONSTRATION PROJECT

All certificate candidates are required to propose and complete a "demonstration project" at their agencies. This allows you to apply the skills learned in the program while sharing the benefits with your agency. Participants can select a project of their choice, but must submit a tangible product that demonstrates mastery of government performance management concepts.

5 RECEIVE CERTIFICATE

Receive your certificate in government financial management from The Performance Institute, along with the CPE credits you've earned.

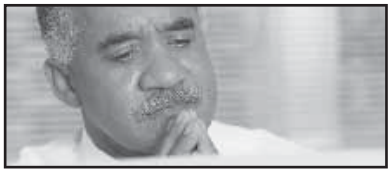
Sample Programs



Auditor

Elective Courses Completed:

- Auditing and Improving Performance Information
- Federal Budget Process: Formulating, Justifying and Executing
- Auditing and Reducing Erroneous Payments in Government



Financial Analyst

Elective Courses Completed:

- Internal Controls: Correcting and Reporting
- Internal Controls: Establishing, Assessing and Managing
- Cost Accounting Management (ABC)

"The course was great and indeed inspiring. I learned a lot and look forward to executing the lessons learned."

- Regina Mack-Abney, Department of Veterans Affairs

8 Ways the Institute Can Help Meet the New Performance Mandates in Government Financial Management

The Performance Institute's expert advisors provide a variety of budgeting and financial management support services available to government agencies. Using the latest financial management methodologies the Institute works directly with agencies on a single budget or on a complete agency-wide financial strategy.

1 Assessing and Improving Internal Controls

The Institute has built a national reputation for assessing and improving internal controls in government to reflect the latest standards of integrity and managerial utility. The Institute can review your agency's internal controls, identify weaknesses, devise corrective action plans, assist in the training of staff and establishment of processes and ultimately assist in the reporting on progress.

2 Performance Measurement Development

At the heart of performance budgeting is the challenge of devising timely, accurate, relevant and useful performance information on individual agency programs. Through a mix of training and facilitation, the Institute will help define program-level and agency-wide performance measures that meet the latest OMB and decision-maker criteria.

3 Full Cost Accounting

Government agencies are increasingly using Activity-Based Costing as one financial accounting method of linking resources to activities and processes. The Institute's Logic Model approach is enhanced to include work processes to which specific activities are aligned with results in both performance and costs of a program in a formal budget justification.

4 Integrated Financial-Performance Management Systems

This does not need to be a complicated process. By keeping measures to the "vital few" and harnessing any existing and new agency IT systems, the Institute has created fully integrated budgets, financial and performance management systems that allow for strategic management within government.

5 Performance Data Quality Improvement

Performance information is only as strong as it is reliable and accurate. The Institute uses a maturity model to assess agency performance information that sets "reasonable accuracy" standards for performance information—an approach that wins rave reviews from managers and auditors alike.

6 Individual Program Evaluations

Periodically, agencies will be under pressure to evaluate the effectiveness of an individual program. The Institute can conduct in-depth program evaluations, resulting in performance assessments, suggestions for reforms and improved performance measurements.

7 Budget Justification Development

The Institute's ability to bridge political-career and executive-legislative mindsets is a main element of its success in creating strong budget justifications. The Institute can provide training and facilitation or reviews and comments on budgets. It can also "model" alternative budget structures and ways of presenting and justifying budget requests based on feedback of appropriators, stakeholders and other budget reviewers.

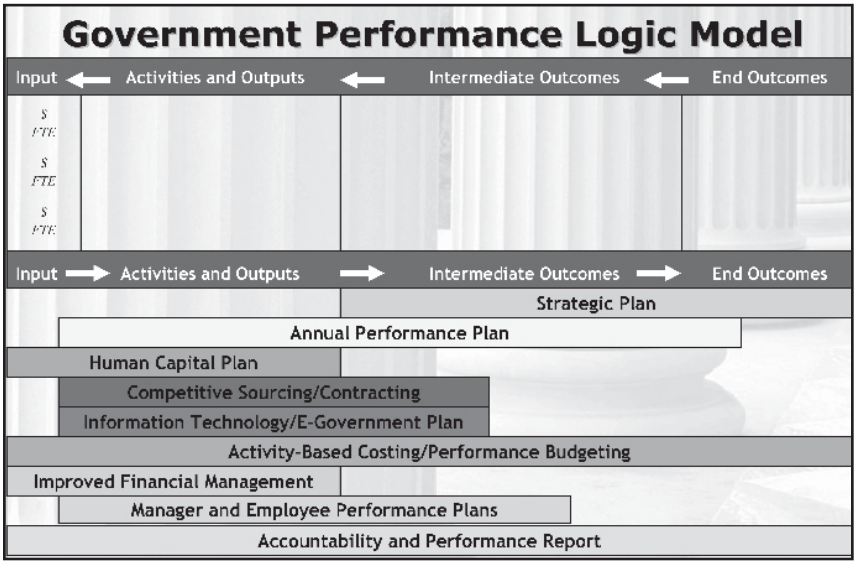
8 Performance and Accountability Reporting

The Institute can assist in the development of a transparent and informative Performance and Accountability Report that "tells the story" of your agency's financial and program performance results. The Institute's approaches to PAR reporting are grounded in the latest CEAR standards from the Association of Government Accountants (AGA).

Developing Effective Performance and Accountability Reports

Standards for Every PAR

- Management Discussion and Analysis (MDA)
- Performance Section
- Financial Section
- Cost Effective Measures and Trend Data
- Integration and Creativity
- Comprehensiveness vs. Length: Striking the Right Balance
- Formatting: Graphics, Colors, Sidebars
- Commendable Practices and Avoiding the Pitfalls



"Great simple models that we can use right away to develop measures with our program side—easy, quick and non-threatening models to use for results."

- Rich Moraski
U.S. Department of Agriculture



GSA Schedule

Easy Access to Institute Consulting Services through MOBIS

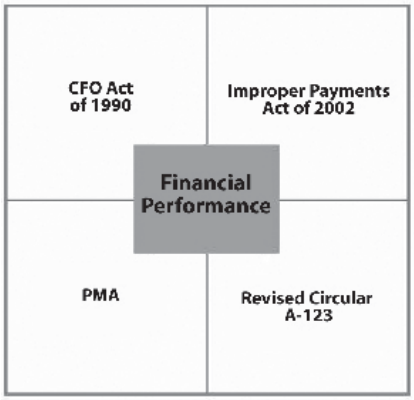
(PI MOBIS Contract Number: GS-10F-0261M)

For more information, contact Blake Zach at 703-894-0481 or Zach@PerformanceWeb.org

The New Role of Financial Management in Government

Government officials are constantly seeking ways to comply with the government financial management standards that deal with accountability and budget expectations. After the Sarbanes-Oxley Act, the government has looked for ways to raise the bar and develop financial management standards that will guide financial managers to clean audits and budget resolutions. Financial performance and accountability are essential to the function of your agency, and increasing demands on government officials make it absolutely necessary to comply.

In this training, you will learn the core financial management competencies needed to successfully carry out your job. You will evaluate the changing culture of the financial management function in government, and examine the future of government financial management. You will also participate in a state of practice workshop focusing on six of the hottest topics in government financial management.



COURSE AVAILABILITY AND CREDITS

January 2-3, 2006 in Arlington, VA (Code: P1021)
May 15-16, 2006 in Arlington, VA (Code: P543)

Open Enrollment:
Course Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE Earn 12 CPEs
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

The Government CFO's Role at the Management Table

- Understand the changing role of the CFO in government financial management
- Examine the old and new responsibilities of the CFO at the federal, state and local levels

Core Competencies of Today's Government Financial Manager

- Learn what is expected of today's government financial manager
- Canvas the skill sets, mandates and regulations of today's government financial manager

The Changing Culture of the Financial Management Function

- Determine a baseline for the financial management function to analyze where it has been and where it will continue to go
- Learn how to comply with new government mandates that have changed the face of the financial management function

Establishing Effective Working Relationships with Auditors and Program Managers

- Forge positive relationships with auditors and program managers
- Communicate key planning decisions and pursue efficiencies with your financial audit

Ethics for Government Financial Managers

- Examine the rebirth of accountability, transparency, performance and integrity in government financial management
- Evaluate the Sarbanes-Oxley Act as it relates to the public sector

DAY TWO

Budgeting and Forecasting

- Walk through the standards of the three phases of the budget process: formulating, justifying, executing
- Examine best practices in budgeting and forecasting for government financial managers

Accounting and Disbursements

- Learn how to overcome erroneous payments in your agency
- Evaluate the need to disburse monies appropriately in alignment with the Anti-Deficiency Act (ADA)

Specialty Accounting

- Update on guidelines for the specialty accounting function that have changed in the past year (grants, debt management, bonds)

Internal Controls

- Update on guidelines for establishing, assessing, managing, correcting and reporting on internal controls in government

Accelerated Reporting

- Implement accelerated reporting in your agency to drive more accurate and timely financial reports year round

Accounting and Reporting Performance

- Canvas the guidelines established for submitting Performance and Accountability Reports (PAR)

Financial Reporting in Government

Reporting on your agency's performance in raising, handling and appropriating funds is a critical service to your organization and the public. "Timely, accurate and useful" financial reporting is instrumental in ensuring that your agency is achieving the highest level of financial performance. Financial reporting in compliance with accounting and auditing standards will assure the proper assessment of financial directives.

In this training, you will learn the elements of a financial report that abides by government regulations and statutes and how to produce accountable and transparent financial information that is accurate and informative. You will also learn the key components of a Performance and Accountability Report (PAR) as well as a best practice financial report.



COURSE AVAILABILITY AND CREDITS

January 4-5, 2006 in Arlington, VA (Code: P1022)
May 17-18, 2006 in Arlington, VA (Code: P545)

Open Enrollment:
Course Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE Earn 12 CPEs
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Overview of Financial Reporting and Financial Accountability

- Canvas the latest financial management standards in financial reporting
- Understand why timely, accurate and useful financial reporting is so important
- Use the new requirements under Appendix A of Revised Circular A-123 as a guideline for effective financial reporting

Understand Financial Reporting and How It Affects Decision Making

- Ensure financial reports are utilized for informed decision making
- Learn how to manage data to make performance reporting more effective and efficient
- Realize internal weaknesses and understand which areas need assistance

Improve the Quality of Financial Performance Information

- Mitigate financial reporting errors and payment errors
- Revamp the financial reporting process by utilizing web-based technologies
- Streamline the reporting process in order to produce quality accelerated financial reports

Develop a Performance and Accountability Report (PAR) in Accordance with CEAR™ Standards

- Assess the importance of the guidelines set forth by the PAR Act, CFO Act and the Accountability of Tax Dollars Act in submitting PARS
- Examine the new section on management's discussion and analysis
- Learn how to effectively communicate performance information

DAY TWO

Understand the Importance of Accelerated Reporting in Government

- Evaluate the importance of getting these reports submitted on time
- Canvas the consequences for not producing accurate and timely financial and performance reports

Evaluate the Role of Ethics in Financial Reporting

- Examine the Sarbanes-Oxley Act and its influence on government financial reporting
- Understand the future of financial reporting in government as it heads towards an era of integrity and accountability

Strengthening Internal Controls in Financial Reporting

- Examine the effect of strong internal controls on financial reporting
- Monitor material weaknesses and take corrective action

Develop a Framework for a Financial Report that Complies with New Government Mandates

- Overview of the laws and mandates that laid the groundwork for sound financial reporting
- Evaluate best practice financial reports
- Understand the sections of a financial report and what information should be included in order to achieve the highest level of success

Performance Reporting in Government

GPRA, PMA and PART all require government agencies to report their performance information on a periodic basis. Ensuring the accuracy and consistency of the information is vital to developing reliable reports that meet the intent of these performance measurement mandates. Attend this course to learn how to collect, report and manage your critical performance information. This training will examine best practices and focus on pragmatic steps to build a measurement culture and create an institutionalized performance management program. In addition, attendees will learn how to collect, analyze and report performance information to managers.

In this training you will learn how to develop a management culture that can implement an effective performance management program. Understand how to successfully collect and manage quality data in order to drive results in your agency.



COURSE AVAILABILITY AND CREDITS

January 17-18, 2006 in Arlington, VA (Code: P536)
July 26-27, 2006 in Arlington, VA (Code: P542)

Open Enrollment:
Course Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE Earn 12 CPEs
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Developing a Meaningful Performance Measurement and Reporting Program

- Evaluate the steps necessary to develop an effective program
- Canvas the critical success factors for performance management
- Understand the critical success factors for a performance management program

Validating Your Performance Measures

- Examine the key characteristics of a quality performance measure
- Harness the key aspects of quality data management
- Develop meaningful measures for your outcomes, strategies and activities

Collecting Performance Information

- Evaluate the sources for data collection
- Identify the challenges in collecting consistent and reliable data
- Create a robust data repository for your agency

Managing Performance Data (Dashboards/Report Cards)

- Learn how to effectively manage your performance data using different information systems
- Maximize strategic investments using the latest in IT governance

Integrating Performance Reporting Technologies: Using the Web, GIS and Other Technologies to Improve Performance Reporting Systems

- Integrate performance information systems with Geographic Information Systems (GIS)
- Create online and electronic methods for tracking and reporting

DAY TWO

Creating Avenues for Motivating Change through the Reporting of Performance Information

- Understand how to create dynamic reports that drive decision making
- Evaluate unit-level metrics that aid in improving individual performance

Internal Reporting: Analyzing Performance Data to Determine Your Course of Action

- Utilize internal comparisons in order to strengthen your data analysis capabilities
- Develop and interpret trend analyses

Internal Reporting: Aligning Performance Reports to Agency Decision Making Cycles

- Effectively communicate agency performance initiatives to decision makers

External Reporting: Crafting a "Performance Message" to Explain Performance Achievements

- Learn how to effectively communicate the story of your agency

External Reporting: Data Reporting Best Practices in Alignment with Performance and Accountability Reports (PAR)

- Determine the right frequency to collect and report performance data
- Choose the right audiences and tailor your performance report to those target areas
- Properly format your report for maximum impact

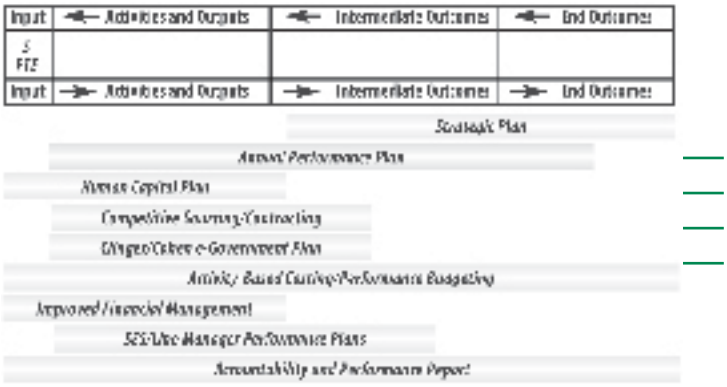
PROGRAM PERFORMANCE

Developing and Using Performance Measures in Government

As we move closer and closer to a performance-based government, financial managers are being required to show not only measures of program efficiency, but also measures of program effectiveness on the business and mission. In addition to being a requirement of the President's Management Agenda and OMB Exhibit 300, the use of performance measures is an established standard for federal, state and local governments seeking improved program performance and enhanced results.

This training will focus on developing performance goals and measures by applying the Government Performance Logic Model framework as a template for performance management. Through the establishment of outcome-oriented performance measures, financial managers will be able to communicate and monitor the success of program results.

THE GOVERNMENT PERFORMANCE LOGIC MODEL



COURSE AVAILABILITY AND CREDITS

September 12-13, 2005 in Arlington, VA (Code: P434)
February 28-March 1, 2006 in Arlington, VA (Code: P558)
July 24-25, 2006 in Arlington, VA (Code: P559)

Open Enrollment:
Course Level: Beginner
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE **Earn 13 CPEs**
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Updates on Performance Measure Mandates and Guidelines in Government

- OMB criteria for effective outcome performance measures
- Align output performance measures to project outcome measures
- Use performance measures to monitor and communicate programmatic success

Develop a Performance Management System in Government to Drive Results

- Promote good management by using measures to monitor performance
- Involve stakeholders and senior leadership in the measure selection process
- Develop critical success factors for an effective measurement system

Outcome Measures: Defining Measures using the Logic Model

- Use the Logic Model and discuss best practice outcome measures
- Establish clearly defined end- and intermediate- outcomes
- Develop measures to communicate internal and external priorities

Measures Linked to Project Strategy

- Assess changes in your organization to attain outcome goals
- Integrate strategies with outcomes to eliminate barriers to improving project performance
- Utilize application assignment to examine particular strategies and objectives for your project

Output Measures: Developing Performance Measures that are Aligned to Organizational Goals and Strategies

- Align outputs to strategies for logical flow of products and services
- Identify key activities that lead to each individual output
- Collect quality measures that communicate the effectiveness and efficiency of organizational output

DAY TWO

Develop Managerial Excellence Measures for Government Functions

- Identify performance measures for management functions
- Improve managerial excellence to leverage programmatic success
- Ensure management reform and initiatives align to the mission of your organization

Application Session: Model Performance Measures for Work Process Mapping and Cost-Efficiencies

- Examine the efficiency and effectiveness of your business processes and link measures used to evaluate their success
- Develop ideal measures for your organization that can be managed and applied
- Utilize ratio analysis to study measures to ensure they are providing you with a sound return on investment

Developing a Performance Information System

- Identify key strategies to collect hard-to-measure outcomes
- Develop project, communication and reporting plans to "roll-up" performance measures
- Ensure performance information is consistent, valid and pertinent to project requirements

SHOW ME THE MEASURES: Model Performance Measures for Citizen-Centered Customer Service

- Streamline your customer service measures
- Ensure your measures are useful: implementation across functions
- Implement the Logic Model methodology

PROGRAM PERFORMANCE

Program Evaluation and Analysis

Government program managers are being held accountable for demonstrating program performance, so it is increasingly important that these managers effectively communicate program goals, outputs and measures as indicators for success. Program evaluation and analysis identifies the cause and effect relationship between performance measures and program results based on the following mantra: what gets measured gets done. Furthermore, it demonstrates the use of effective program evaluation as a vehicle to drive management decisions and improve performance.

The methodology provided in this course will allow managers to canvas employees and stakeholders for feedback on the services provided as well as the outlined goals and measures for each fiscal year. Managers will also receive strategies on how to effectively communicate the results and feedback from the evaluation to improve program stewardship.

10 STEPS TO SUCCESSFUL PROGRAM EVALUATION AND ANALYSIS

Step 1: Determine Evaluation Scope
Step 2: Canvas Program Managers and Stakeholders
Step 3: Develop Logic Model to Map Existing Activities, Outputs and Outcomes
Step 4: Evaluate New Performance Data
Step 5: Determine Quality of Existing and New Performance Data
Step 6: Evaluate External Issue Landscape
Step 7: Assess Causality between Programmed and Measured Results
Step 8: Evaluate External Issue Landscape
Step 9: Evaluate Efficacy of Internal Management Capacities
Step 10: Devise Evaluation Report and Formulate Next Steps

COURSE AVAILABILITY AND CREDITS

January 17-18, 2006 in Arlington, VA (Code: P534)
September 11-12, 2006 in Arlington, VA (Code: P535)

Open Enrollment:
Course Level: Beginner
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE Earn 12 CPEs
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Trends and Methodologies in Program Evaluation and Analysis

- Understand legislative and executive program evaluation initiatives
- Explore new tools and techniques in program evaluation

Step 1: Determine Evaluation Scope

- Identify expectations of policymakers
- Catalog program activities and expenditures to be evaluated

Step 2: Canvas Program Managers and Stakeholders

- Identify key internal personnel and external stakeholders
- Solicit input and viewpoints from managers and stakeholders

Step 3: Map Existing Activities, Outputs and Outcomes

- Create a performance management framework to outline annual program goals and long-term goals
- Align existing program activities and outputs to defined goals

Step 4: Evaluate Existing Performance Measures

- Identify outcome-oriented performance measures that communicate program goals, outputs and workload
- Assess what performance measures do not fall within the boundaries of management's framework

Step 5: Determine Quality of Existing and New Performance Data

- Ensure performance goals and measures meet OMB guidelines
- Develop data systems that support overarching performance data

Step 6: Evaluate New Performance Data

- Assess the availability and applicability of performance data
- Evaluate the collection process of performance data, and the reliability and credibility of data
- Assess the costs of new performance data

DAY TWO

Step 7: Assess the Causality between Your Program and Measured Results

- Outline the cause and effect relationship among strategic goals, plans and accountability reports
- Determine the essential role of program performance goals and measures to provide feedback for improved performance

Step 8: Evaluate the External Issue Landscape

- Assess the external factors influencing program operations
- Conduct risk analysis of possible pitfalls and solutions facing a program due to external factors and internal responses

Step 9: Evaluate the Efficacy of Internal Management Capacities

- Utilize a SWOT analysis to identify strengths and weaknesses
- Perform culture audit to identify employee and management resistance or acceptance to change

Step 10: Devise an Evaluation Report and Formulate Next Steps

- Assess the final impact of the program evaluation and provide next step analysis to program managers to communicate solutions
- Identify key ingredients of program performance that need to be revised or created in order to improve overall program performance

PROGRAM PERFORMANCE

Strategic Planning in Government

Federal, state and local government agencies are increasingly under pressure to develop long-range strategic plans that chart out agency goals on a multi-year basis. From the Government Performance and Results Act to state and local mandates, agencies are asked to use strategic planning at all levels of the organization to develop goals, refine policies, and manage initiatives. Strategic planning in a governmental context requires a modified approach to traditional strategic planning that mixes statutory requirements with the evolving dynamics of public policy issues faced by government agencies. Acquiring strategic planning skills will aid in your program's ability to define results, manage for results and communicate with program stakeholders.

This training will focus on developing a performance-based strategic plan by applying the strategic management framework methodology as a template for developing a results-oriented strategic plan for your government programs. This framework is derived from best practices at all levels of government and is compliant with the GPRA strategic planning criteria and OMB guidance.

STRATEGIC MANAGMENT FRAMEWORK



COURSE AVAILABILITY AND CREDITS

November 7-8, 2005 in Arlington, VA (Code: P431)
February 27-28, 2006 in Arlington, VA (Code: P530)
June 26-27, 2006 in Arlington, VA (Code: P531)

Open Enrollment:
Course Level: Beginner
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE Earn 12 CPEs
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Srategic Planning Mandates and Trends

- Government Performance and Results Act (GPRA)
- President's Management Agenda (PMA)
- Strategic planning lessons from the federal, state and local levels

Strategic Planning Framework

- Instruction on a strategic management framework
- Instruction on Logic Model methodology
- Designing a strategic planning process to solicit internal and external feedback

Defining Mission and Outcome Goals

- Developing an effective, statute-based mission statement
- Including a vision statement with organizational values and principles
- Establishing outcome goals to drive mission-aligned organizational results

Strategic Issue Analysis

- Conduct a comprehensive landscape assessment that analyzes issues faced by a government program
- Lead a SWOT analysis and center-of-gravity analysis
- Examine issue research, program evaluations, policy studies and stakeholder input

DAY TWO

Defining Strategies for Achieving Results

- Examine the costs and benefits of strategic alternatives
- Define intermediate outcome impacts on attitudes, behaviors and conditions
- Justify program strategies with policy analysis and organizational assessments

Aligning Program Outputs and Activities to Strategic Plan

- Cascade outcome goals and strategies to the program level
- Define activities to achieve desired results

Involving Stakeholders, Customers and Legislators in the Strategic Planning Process

- Complete a thorough assessment of customer and stakeholder needs and issues
- Establish a continual information exchange among staff, management, customers and other key stakeholders

Rolling Out Your Strategic Plan to Employees

- Decide how to roll-out your strategic plan to achieve organizational change
- Develop strategies to communicate expectations to staff and front-line supervisors

Case Study: Strategic Planning Best Practice

- Examine the strategic planning process and results from an agency example

Application Session: Scenario and Planning Exercise

- Analyze an issue scenario by applying the SWOT and center-of-gravity assessment models
- Define mission, outcome goals, strategies, outputs and activities

PROGRAM PERFORMANCE

Balanced Scorecard Measurement and Management in Government

As agencies are asked to improve management and meet performance mandates, it is essential that managers adopt performance management frameworks to help drive decisions. Through the implementation of the balanced scorecard framework, agencies not only align strategic goals with the strategic plan, but also help drive budget decisions and customer service measures. Government managers will acquire the skills necessary to develop performance goals and measures and to utilize the performance data to aid in management decisions.

Government managers will learn the balanced scorecard framework, and each component that makes up the overall management structure. Through the analysis and application of performance goals and measures, managers will develop the skills necessary to manage change and success in their organizations.



COURSE AVAILABILITY AND CREDITS

January 11-12, 2006 in Arlington, VA (Code: P1020)
May 8-9, 2006 in Arlington, VA (Code: P585)

Open Enrollment:
Course Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE **Earn 13 CPEs**
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Overview of the Balanced Scorecard (BSC)

- Understand key principles and the evolution of the balanced scorecard
- Discuss misconceptions, challenges and successes of the balanced scorecard

Understanding the Terms and Tools of the Balanced Scorecard Approach

- The "architecture" of strategy maps and scorecards
- Walking through an example government balanced scorecard

The Customer Perspective

- Understand your customers and stakeholders
- Define, clarify and communicate your value proposition
- Develop customer and management satisfaction measures to communicate success in government services and stewardship programs

Business Process Perspective

- Focus on outputs and activities that are tied to mission-oriented outcomes
- Develop performance measures that communicate successful business processes

The Learning and Growth Perspective

- Human capital planning and strategic human capital assessment
- Development of high performance work systems and communication tools

The Financial Perspective

- Multiple options for a public-sector financial perspective
- Use a strategy map and strategic initiatives to help resource allocation and make a business case as to budget justifications

DAY TWO

Communicating and Planning for Change

- Understand the importance of change management when developing and implementing a new performance management framework
- Identify keys to building consensus and support

Applying Balanced Scorecard in the Field: Best Practices for Balanced Scorecard Management

- Learn best practices from balanced scorecard success stories in the public sector
- Benefits experienced from use of balanced scorecard

Step-by-Step Process for Designing a Pilot Scorecard and Strategy Map

- Develop a framework for selecting a pilot area
- Understand the process for designing linked objectives and strategy maps

Application Workshop

- Hands-on exercise: design linked objectives and strategy maps
- Review of causal drivers on the sample strategy map

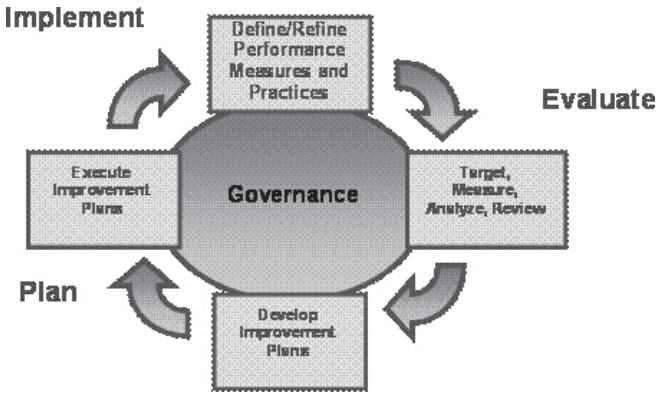
Conclude Application Workshop

- Performance measurement principles
- Use of balanced scorecard measures to drive management decisions and communicate

Auditing and Improving Performance Information

Effective performance management not only relies on the clarity of performance goals and measures, but also on the quality of the supporting information. When developing effective performance measures, a system must be in place to assess the validity and reliability of our performance information. Acquire the skills necessary to create a streamlined performance information system that supplies all managers with credible information to help drive the right decisions.

This training will focus on the key aspects of quality performance information, and ensure that a performance management framework is developed to communicate all those aspects. This framework will aid government managers in not only creating performance goals, but establishing criteria to determine the quality and credibility of performance information for government programs.



COURSE AVAILABILITY AND CREDITS

January 19-20, 2006 in Arlington, VA (Code: P538)
September 13-14, 2006 in Arlington, VA (Code: P539)

Open Enrollment:
Course Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE Earn 12 CPEs
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Update on Performance Auditing Guidelines: Designing and Reporting Performance Measures that Management Can Actually Use

- Updates on the latest OMB issued guidelines for data quality standards
- Evaluate performance measurements based on relevancy and data collection costs

Creating Reliable, Timely and Useful Performance Measurement Systems in Government

- Develop a performance measurement system that accounts for goals, measures and key outputs
- Communicate the essential steps necessary to ensure the quality of your data

Validity, Verification and Data Quality Standards

- Benefits of the development of data methodologies and auditing techniques to improve performance systems
- Improve data quality systems consistent with best practice performance auditing standards

Data Standardization across Program Managers: Establishing Common Measures, Definitions and Reporting Standards

- Collect, categorize and report performance information
- Audit and detect inconsistencies in performance information
- Adhere to reliability and relevancy standards of information

Examining the Quality of Data Sources and Evaluating Costs and Benefits of Individual Measurements

- Define the measures used in management decisions
- Assess data collection and reporting and evaluation costs
- Examine the quality of data sources

DAY TWO

Creating a Comprehensive Maturity Model for Performance for Evaluating Performance Information

- Set a quality threshold for performance information
- Streamline the number of performance measures

Assessing the Strengths, Weaknesses, and Changes Needed to Implement and an Effective Performance Management Program

- Pinpoint best practices for institutionalizing your program initiatives
- Implement changes consistent with your agency's culture

Partnerships: Forging Manager-Auditor and Stakeholder Relationships to Improve Performance Measurement Quality and Use

- Establish beneficial auditor-manager relationships
- Define strategies for improving the quality of program partners to report meaningful and accurate performance information

Devising Performance Measures Consistent with Data Quality and Audit Standards

- Align performance goals and measures with agency data systems
- Address validity in the strategic design of your system
- Incorporate data standards into the strategic architecture of your performance measurement system

PROGRAM PERFORMANCE

Performance-Based Grants Management

This training will provide grant managers with the skills necessary to design and award grants that are performance-based in their origin and that incorporate evaluation and reporting strategies within their structure. Through the use of the Government Performance Logic Model framework, both managers and recipients will be able to focus on developing performance goals, timelines and resource allocation strategies specific to each grant or program.

Through the incorporation of outcome-oriented performance measures, managers will be able to communicate, monitor and enforce the compliance requirements that will guarantee a successful closing or extension of the grant.

10 STEPS FOR IMPROVING GRANT MANAGEMENT

Step 1: Comprehensive Framework for Performance Measure and Evaluation for Grants
Step 2: Establishing Your PBGM Team
Step 3: Streamline the Grants Terms and Conditions
Step 4: Designing Performance Measures and Including Them in RFPs and/or Grant Applications
Step 5: Optimize the Solicitation, Review and Award Processes
Step 6: Select the Right Grantee
Step 7: Evaluating the Progress of Your Grantee
Step 8: Assisting Grantees with Implementing Effective Performance Measures
Step 9: Using Third-Party Evaluators to Assess Grantee Performance
Step 10: Post-Award Monitoring, Oversight and Review

COURSE AVAILABILITY AND CREDITS

March 2-3, 2006 in Arlington, VA (Code: P1016)
July 17-18, 2006 in Arlington, VA (Code: P547)

Open Enrollment:
Course Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE **Earn 12 CPEs**
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Overview of Federal Grants Management, Circulars and Regulations

- Understand applicable legislation and compliance issues
- Discuss the pros and cons of developing and implementing performance measures to evaluate grant program success

Step 1: Comprehensive Framework for Performance Measures and Evaluation for Grants: Lessons for Funders and Their Grantees

- Develop a framework for measuring grant program performance
- Utilize logic modeling to link end-outcomes to specific grant program activities

Step 2: Establishing & Training a PBGM Team

- Identify all stakeholders for grants programs
- Align individuals' responsibilities to the project's mission

Step 3: Streamlining the Grant's Terms and Conditions to Focus on Results

- Benchmark the purpose, objective and projected outcome of a grant and advertise the available assistance in required media
- Determine the key components of each grant

Step 4: Designing Performance Measures and Including Them in RFPs and/or Grant Applications

- Design performance measures as part of the RFP and educate potential grantees of the role of performance measures
- Develop RFPs to measure appropriate outcomes

DAY TWO

Step 5: Optimize the Solicitation, Review and Award Processes

- Streamline the solicitation and award criteria
- Conduct efficient and productive market-sector research

Step 6: Selecting the Right Grantee Using Performance Criteria

- Evaluate past grantee performance
- Determine the "best value"

Step 7: Evaluating the Progress of Your Grantee

- Determine the type of follow-up required
- Assess the grantee's operational and financial capacity to overcome performance obstacles, take corrective action and report progress

Step 8: Assisting Grantees with Implementing Effective Performance Measures

- Link performance measures to budgeting and staffing
- Make performance measurement and evaluation part of everyday functioning and improvement

Step 9: Using External Evaluators to Assess Grantee Performance

- Develop a value-added approach to using third-party evaluators
- Balance the need for an expert evaluator with the need to incorporate evaluation into capacity building for grantees

Step 10: Post-Award Monitoring, Oversight and Review

- Determine whether positive changes have been demonstrated
- Devise clear measures of performance and accountability

Internal Controls: Establishing, Assessing and Managing

Establishing, assessing and managing effective internal controls in your agency is the key to making sure your agency maintains effective and efficient operations, reliable financial reporting and compliance with applicable laws and regulations. Internal control includes processes for planning, organizing, directing, controlling, and reporting on agency operations and will help you achieve short and long term agency objectives.

In this training you will learn the key components for establishing, assessing and managing internal controls. You will gain knowledge of the control environment and control activities while assessing risk for your internal control initiatives.

COURSE AVAILABILITY AND CREDITS

February 16-17, 2006 in Arlington, VA (Code: P1022)
May 17-18, 2006 in Arlington, VA (Code: P544)

Open Enrollment:
Course Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE Earn 13 CPEs
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Overview of Internal Control Mandates in Government

- Update on federal, state and local trends in implementing internal controls
- Evaluate the recent emphasis on the Sarbanes-Oxley Act and how it impacts the public sector

Establishing Internal Control in Your Agency

- Examine the role of management in developing and maintaining effective internal control
- Design management structures to ensure accountability for results
- Develop systemic and proactive measures to ensure appropriate and cost-effective internal control

Assessing Internal Control in Your Agency

- Analyze the importance of monitoring internal control
- Understand the role of periodic assessments of internal control
- Evaluate the role of agency management in determining the level of document support

Managing Internal Control in Your Agency

- Assess the importance of developing a senior management council
- Examine the responsibility of management in developing and maintaining internal control

Analyze the Sources of Information that Affect Top-Level Decision Making

- Learn the role of supplemental sources of information in assessing and monitoring internal controls
- Maximize your understanding of the role of evaluations when considering different sources of information
- Identify deficiencies in internal control

DAY TWO

Enhance Your Knowledge of the Control Environment

- Understand why agencies need effective internal controls
- Secure commitment from upper level management to maintain competence in the workplace
- Define the organizational culture through development of effective leadership

Understand the Effect of Control Activities

- Analyze policies and procedures in order to make sure agency objectives are met
- Examine the importance of general control and application control

Identify and Assess the Risks of Internal Control and Determine the Causes of Weakness

- Identify risks and relationships inside and outside the agency
- Account for previous findings when identifying risk
- Maximize your knowledge of potential weaknesses while creating corrective measures

Risk Assessment Application Session: Develop a Risk Assessment Plan

- Canvas all of your programs and evaluate areas in need of improvement
- Identify and implement the specific procedures necessary to ensure effective internal control

FINANCIAL PERFORMANCE

Internal Controls: Correcting and Reporting

After you establish, assess and manage your internal controls, you must be able to correct any deficiencies and report on any progress. Material weaknesses must be identified and corrected by establishing a corrective action plan. Effective monitoring of internal control is vital to safeguarding agency assets from waste, loss, unauthorized use and misappropriation.

In this training you will learn how to identify, correct and report on any deficiencies and material weaknesses in order to supply timely and accurate financial information. You will examine the importance of implementing internal control over financial reporting and learn how to effectively report on internal controls.

COURSE AVAILABILITY AND CREDITS

January 19-20, 2006 in Arlington, VA (Code: P1024)
May 18-19, 2006 in Arlington, VA (Code: P537)

Open Enrollment:
Course Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE Earn 12 CPEs
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Overview of Internal Control Mandates in Government

- Update on federal, state and local trends in implementing internal controls
- Evaluate the recent emphasis on the Sarbanes-Oxley Act and how it impacts the public sector

Correcting Internal Control Deficiencies

- Understand why correcting deficiencies is imperative to maintaining management accountability
- Evaluate the role of the Performance Accountability Report (PAR) in reporting material weaknesses

Correcting Material Weaknesses in Internal Control over Financial Reporting

- Establish systems to ensure that a corrective action is implemented for all material weaknesses
- Maintain a complete record of every action take on material weaknesses

The Role of IG and GAO Audit Reports

- Understand the role of audit reports in identifying and correcting internal control deficiencies
- Evaluate the statutory requirements for audit follow-up

Developing a Corrective Action Plan

- Identify all corrective actions taken to handle material weaknesses
- Ensure that all corrective action plans abide by all laws and regulations

DAY TWO

Evaluating the Objectives of Internal Control over Financial Reporting

- Safeguard agency assets from waste, loss, unauthorized use, and misappropriation
- Canvas the implications, effects and results of a reliable financial report

Understanding the Role of Information and Communications

- Evaluate the importance of communicating relevant, reliable and timely information within and outside the agency
- Communicate effective internal control information to relevant personnel

Monitor Internal Controls to Address Deficiencies

- Implement periodic reviews, reconciliations or comparisons of data into daily routines
- Create a systematic process for addressing internal control deficiencies

Reporting on Internal Control: Preparing the Integrity Act Report

- Canvas the guidelines prescribed for submitting the Integrity Act Report
- Examine a best practice Integrity Act Report and develop the skills needed to submit an accurate, timely, and useful report

FINANCIAL PERFORMANCE

Auditing and Reducing Erroneous Payments in Government

The number of government agencies reporting erroneous payments is on the rise, and federal, state and local government officials are constantly looking for ways to curb these disturbing statistics. The increasing scope of financial reporting over the last few years has shown that erroneous payments are a significant and panoptic problem in government agencies. In order to overcome erroneous payments in your agency, you must establish an effective risk assessment plan and incorporate internal controls across all payment types.

In this training you will learn how to work effectively with auditors and recipients in order to safeguard your agency from wasting important assets. You will also learn how to develop performance measures to overcome erroneous payments in government. Establish a training program so that the individuals in your agency know how to deal with this ever-growing flaw in financial management. The need for financial accountability and transparency has never been greater; the time is now for you to learn how to protect your agency from delivering erroneous payments.

COURSE AVAILABILITY AND CREDITS

January 9-10, 2006 in Arlington, VA (Code: P1023)
May 15-16, 2006 in Arlington, VA (Code: P546)

Open Enrollment:
Course Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE Earn 12 CPEs
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Overview of Mandates and Guidelines

- Understand why reducing erroneous payments in your agency is key to financial success
- Canvas the Improper Payments Information Act of 2002

Understanding the Nature of Improper Payments across Different Payment Types in Government

- Understand how improper payments directly affect your agency
- Evaluate the issues of entitlements and direct purchases when dealing with improper payments

Conducting Risk Assessments over Improper Payments

- Review and prioritize program activities susceptible to improper payments
- Conduct risk assessments on programs to uncover weaknesses in resource allocation

Establishing Your Improper Payment Baseline

- Examine where you are now and where you want to be
- Brainstorm a plan for reducing improper payments

Developing a Plan to Reduce Improper Payments

- Canvas the critical success factors for devising and implementing improper payment reduction programs
- Learn how to submit an effective plan to Congress, OMB, and auditors

Improving Internal Controls to Reduce Improper Payments

- Learn how to implement internal controls in your agency to reduce improper payments
- Evaluate the five key components of internal control as outlined by Revised Circular A-123

DAY TWO

Implementing Post Payment Recovery Auditing Programs

- Examine the Defense Authorization Act of 2002
- Understand why establishing a post payment recovery auditing program will lead to cost effective recovery of erroneous payments

Establish Training Programs to Reduce Payment Errors

- Evaluate why effective training programs are integral to reducing payment errors

Work with Auditing Partners and Recipients to Reduce Errors in Payment

- Learn the auditor's role in reducing improper payments
- Understand how to work with recipients to reduce payment errors

Canvas Performance Measures and Monitor Agency Progress to Reduce Payment Errors

- Develop effective performance measures to reduce improper payments
- Reduce payment errors through effective monitoring of all transactional statements

Outsourcing and Partnering to Establish an Improper Payment Reduction Program

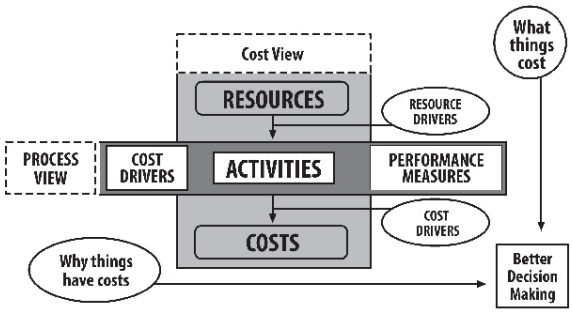
- Perform a cost-benefit analysis to determine the strengths and weaknesses of outsourcing
- Evaluate the benefits of partnering in developing an improper payment reduction program

Cost Accounting Management (ABC)

As agencies are tasked with linking resources to results, it becomes increasingly important that the full cost of government services be calculated. Through increased use of performance measures, cost data and management frameworks, agencies are able to make managerial decisions based on the cost and impact of services provided. Through analysis and updates on managerial accounting standards and performance mandates, managers will acquire the skills necessary to make important decisions on cost of operations and program stewardship.

This training will focus on providing managers with the strategies they need to develop performance goals and measures and associate cost and resource allocation to meet those goals. Comply with federal accounting standards and performance mandates in order to build the manager competency that is demanded by new financial management standards.

THE ABC/M CROSS



COURSE AVAILABILITY AND CREDITS

February 1-2, 2006 in Arlington, VA (Code: P1015)
August 24-25, 2006 in Arlington, VA (Code: P548)

Open Enrollment:
Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE **Earn 12 CPEs**
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Understand the Current Mandates and Issues Dealing with Activity Based-Costing (ABC)

- Evaluate the need for effective activity based-costing by examining such federal mandates as PMA and PART

Step 1: Develop and Align Your Agency to a Strategic Plan

- Create a strategic plan in order to improve project initiatives
- Use the "Logic Model" to reach organizational goals by examining outcome measures

Step 2: Determine Program Outputs Through Careful Analysis

- Learn what your agency can do to influence change
- Examine the products and services that you should produce and provide

Step 3: Define Activities to Deliver Program Outputs

- Evaluate effective activities in order to improve agency programs
- Identify the financial resources and workforce skills needed in order to execute successful programs

DAY TWO

Step 4: Calculate Costs for Direct and Indirect Activities

- Understand the SMART framework in order to develop and implement the most effective performance measures
- Evaluate intermediate- and end- outcomes as well as outputs in order to calculate program cost

Step 5: Correlate New Output Costs to Intermediate Outcome Achievements

- Learn how to use the ABC Strategic Matrix in order to define end- outcomes
- Stay on top of your outcome achievements and output cost by presenting cost and performance information

Step 6: Achieve Cost Efficiencies Through Restructuring

- Learn how to allocate budgetary resources based on performance towards agency goals
- Evaluate the need for competitive sourcing and workflow restructuring through managerial decisions

Step 7: Set Targets and Revise Those Targets after Budget Finalization

- Envision target expectations to reach intermediate- and end-outcomes

Step 8: Establish a Budget Account for Restructuring and Alignment

- Redevelop targets for the final budget after restructuring
- Analyze current information and adjust your agency accordingly in response to positive and negative gains

Step 9: Budget Justification

- Improve program performance through annual performance plans, performance measures and PART
- Understand the root causes of failure by examining the effects of poor planning, bad measures and weak management

Step 10: Budget Execution

- Understand the link between performance measures and effective implementation of strategic plans
- Evaluate what it takes to achieve flawless budget execution

BUDGET PERFORMANCE

Federal Budget Process: Formulating, Justifying and Executing

The federal budget process is complex and intimidates many government program managers. The budget process is not an economic process—it is an inherently political process that must be managed carefully. Understanding and navigating the budget process effectively is the key to ensuring full funding for your program initiatives. This course will equip you with a solid understanding of how the budget process works: from the formulation of a program budget internally, to justifying budget requests to OMB and Congress, and ultimately to proper execution of a program budget.

Formulating budgets involves careful analysis of program activities, solid estimation of costs, and the most efficient use of resources. Justifying budgets involves preparing budget requests using departmental and administration formats, detailing rationale for resource requests and use of performance measures to ensure full business case accountability. Finally, budget execution requires effective resource management skills, from monitoring resource burn rate to ensuring the proper, legal and accountable use of funds throughout the budget year.

COURSE AVAILABILITY AND CREDITS

February 6-7, 2006 in Arlington, VA (Code: P1016)
August 24-25, 2006 in Arlington, VA (Code: P549)

Open Enrollment:
Course Level: Beginner
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE **Earn 12 CPEs**
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Overview of the Federal Budget Process: Step-by-Step

- Program budget formulation
- OMB review and passback (and appeals)
- Congressional review and action (and continuing resolutions)
- Distribution of funds and reconciliation

Understanding the Forces that Drive the Budget Process

- Anticipating and navigating the political forces within the Administration and Congress
- Operating within department priorities and budget guidelines

Budget Formulation: Clarifying Guidelines and Guidance

- Financial management legislation and guidelines for budget formulation
- Treatment of capital assets, employee needs and costs, and multi-year obligations

Budget Formulation: Estimating and Forecasting Costs

- Estimating and forecasting costs of program activities
- Building your budget from unit budget requirements to program mission

Budget Formulation: Application Session

DAY TWO

Budget Justification: Clarifying Guidelines and Guidance

- Understanding what Congress and OMB look for in budget justifications
- Key elements of effective budget justifications
- Update on requirements from OMB Circular A-11 and Departmental guidance
- PART and performance-based budgeting mandates

Budget Justification: Building an Effective Business Case

- Canvassing and presenting your program data effectively
- Designing the "message" of your budget justification and making it effectively
- Integrating performance goals and measures into the justification
- Writing, editing and vetting

Budget Justification: OMB Review and Congressional Review

- Responding to OMB Passbacks
- Responding to Congressional inquiries on your budget: do's and don'ts

Budget Justification: Application Session

Budget Execution: Clarifying Guidelines and Guidance

- Financial management standards governing budget execution: staying within the law
- Managing to the legal availability of funds: purpose, timing and amount
- Financial accounting and reporting schedules

Budget Execution: Tracking, Monitoring and Modifying

- Devising and staying within a spending plan
- The what if scenarios: mid-year reductions, continuing resolutions and/or budget busting

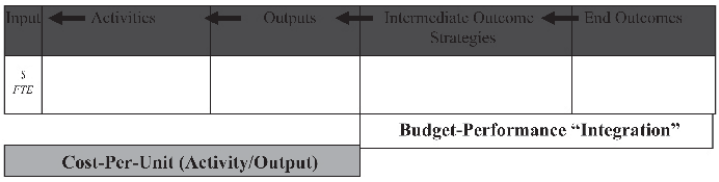
BUDGET PERFORMANCE

Performance-Based Budgeting in Government

In this training you will understand how to develop performance measures that will help your agency align to a strategic plan through the application of the Logic Model Framework. Effectively communicate program results to decision makers by cascading the PART in order to assess program relevancy, planning, management and results. Attend two application sessions that will walk you through completing your own PART questionnaire and developing an activity-based budget.

By attending this training, you will walk through the ten step process to integrate performance and budget information and be able to align your agency to a strategic plan in order to eventually formulate, justify and execute a performance-based budget.

BUILDING A PERFORMANCE-BASED BUDGET: TEN STEPS USING THE LOGIC MODEL



Step 1: Develop/Align to Strategic Plan (Missions, Outcomes, Strategies
Step 2: Determine Outputs (By Program)
Step 3: Define Activities to Deliver Outputs
Step 4: Calculate Existing Full Costs (Direct/Indirect for Each Activity)
Step 5: Correlate New Output Costs to Intermediate Outcome Achievements
Step 6: Achieve Cost Efficiencies through Restructuring
Step 7: Set Targets (Revise after Budget Finalization)
Step 8: Budget Account Restructuring/Alignment
Step 9: Budget Justification
Step 10: Budget Execution

COURSE AVAILABILITY AND CREDITS

October 24-25, 2005 in Arlington, VA (Code: P437)
March 2-3, 2006 in Arlington, VA (Code: P532)
August 22-23, 2006 in Arlington, VA (Code: P533)

Open Enrollment:
Course Level: Beginner
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE **Earn 12 CPEs**
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Achieve Effective Performance Information in Government

- Overview of PART expectations
- OMB review of performance plans
- Expectations for future implementation of PART

Integrate PART to GPRA and PMA

- Strengths and weaknesses of past performance mandates
- Role of GPRA and PMA in program management
- Integrate and communicate PART, GPRA and PMA
- Step-by-Step Application of PART

PART Element 1: Program Purpose and Design

- Detailed analysis of questions in section one
- Analyze clearly defined program purpose and mission
- Identify programs with duplicative program purpose

PART Element 2: Program Planning

- Detailed analysis of questions in section two
- Identify strategic planning strengths and deficiencies
- Analyze long-term and annual performance goals and measures

PART Element 3: Program Management

- Detailed analysis of questions in section three
- Evaluate management of program goals as outlined in strategic plan
- Identify areas of management challenges in program stewardship

PART Element 4: Program Results

- Detailed analysis of questions in section four
- Evaluate program success toward long-term goals and measures
- Identify program success in meeting annual performance goals and measures

DAY TWO

Create a Performance-Based Budget: Ten-Step Process to Integrate Performance and Budget Information

- Develop/Align to Strategic Plan
- Determine Outputs (by program)
- Define Activities to Deliver Outputs
- Calculate Existing Full Costs (Direct/Indirect for Each Activity)
- Correlate New Output Costs to Intermediate Outcome Achievements
- Achieve Cost Efficiencies through Restructuring
- Set Targets (Revise after Budget Finalization)
- Budget Account Restructuring/Alignment
- Budget Justification
- Budget Execution

Calculate and Correlate Program Costs by Using Performance Framework

- Develop long-term and annual performance goals and measures that monitor program success
- Develop performance-based functions that break down silos and communicate success throughout the program
- Integrate goals, measures, outputs and activities into a performance framework to illustrate success

Application Session: Develop Your Own PART

- Complete PART questionnaire for your program
- Create a business case for your budget request
- Apply performance management framework to PART

Application Session: Develop an Activity Based Budget

- Create a plan that links to your budget
- Develop clear cost value of activities for results
- Examine areas of savings through implementation of concepts

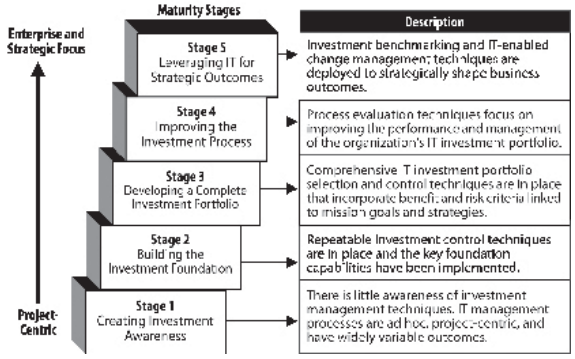
BUDGET PERFORMANCE

IT Capital Planning and Investment Management in Government

Capital planning and investment management are the cornerstones of managing IT project portfolios in government and is a key competency identified in the CIO Council's Project Manager Qualification Guidance. This course will provide a comprehensive methodology for creating an effective IT capital plan to ensure that your IT projects are well-planned, well-funded and well-executed using a clear investment strategy.

The framework developed by GAO, Information Technology Investment Management, utilizes a methodology comprised of key practices that contribute to attainment of a maturity stage in the management of your IT portfolio. These methodologies will enable you to utilize comprehensive portfolio and performance management strategies in order to make sound IT decisions.

THE FIVE STAGES OF MATURITY WITHIN ITIM



Source: Government Accountability Office

COURSE AVAILABILITY AND CREDITS

November 3-4, 2005 in Arlington, VA (Code: T188)
April 24-25, 2006 in Arlington, VA (Code: T213)
September 5-6, 2006 in Arlington, VA (Code: T1003)

Open Enrollment:
Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$6500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE **Earn 13 CPEs**
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

IT Capital Planning Guidance and Mandates in Government

- Updates from the 2002 E-Government Act
- Understand the requirements of Clinger-Cohen and OMB Circulars A-130, A-11 and the Exhibit 300 and 53 processes

The Framework: Government Technology Maturity Model for IT Investment and Performance Management

- Understand the GAO framework and get updated on new changes
- Learn how the framework will provide a clear structure for assessing IT capital planning
- How to apply it, how to benchmark against it, how to advance through the stages and implement best practices

Step-By-Step Walkthrough: Information Technology Investment Management (ITIM)

Stage 1: Creating Investment Awareness

- Recognize strategic elements and implementation methods
- Determine requirements for proposal justifications
- Conduct a risk analysis and establish success metrics

Stage 2: Building the Investment Foundation

- Determine IT investment board operation, project oversight and asset tracking
- Examine business needs for IT projects

Stage 3: Developing a Complete Investment Portfolio

- Use the Information Technology Investment Portfolio System (ITIPS)
- Establish authority alignment of IT investments boards
- Plan for technology acquisition and architecture development

DAY TWO

Stage 4: Improving the Investment Process

- Establish post-implementation reviews and feedback
- Ensure portfolio performance evaluation and improvement
- Apply system and technology succession management

Stage 5: Leverage Information Technology for Strategic Outcomes

- Ensure investment process benchmarking
- Implement IT-driven strategic business change
- Advance from IT strategy to organizational results

IT Capital Planning: What Gets Measured is What Gets Done

- Determine metrics for portfolio development
- Establish portfolio performance management
- Discover the tools and techniques for accurate performance measures

Case Study: Implementing the IT Capital Planning and Investment Management

- Acquire strategies and best practices from federal agencies using the ITIM framework

BUDGET PERFORMANCE

Improving IT Budget Justifications

The Office of Management and Budget has recently changed their Exhibit 300 requirements. Agencies are being asked to demonstrate and measure how their IT spending will support the achievement of agency missions through the use of mission-aligned performance measures, the President's Management Agenda, and the Federal Enterprise Architecture. In order to comply with OMB and achieve full funding for your projects, it is vital for your agency to stay on top of the latest changes and be aware of best practices for building better IT business cases.

Based on the most common pitfalls identified by OMB as reasons for a failing score, this course focuses on 10 key requirements for receiving a passing score on Exhibit 300 submissions. Attend this course to utilize existing project information to address each area of the Exhibit 300 process in order to ensure a high score and save valuable time.

TOP-TEN REQUIREMENTS FOR A SUCCESSFUL IT BUSINESS CASE

1. Demonstrate earned value
2. Develop mission-aligned performance measures
3. Conduct comprehensive alternatives analysis and risk assessments
4. Align security controls with Federal Enterprise Architecture
5. Close gaps in financial evaluation criteria
6. Integrate budget justifications with project life-cycles
7. Align technical and business architectures
8. Link strategic plans to project results
9. Identify differences between Development, Modernization, and Enhancement (DME) and Steady-State project business cases
10. Establish roles for IPT

COURSE AVAILABILITY AND CREDITS

October 11-12, 2005 in Arlington, VA (Code: T485)
April 27-28, 2006 in Arlington, VA (Code: T215)
July 17-18, 2006 in Arlington, VA (Code: T216)

Open Enrollment:
Course Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$6500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE **Earn 12 CPEs**
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Update on OMB Directives and Pending Changes in Exhibit 300

- Examine important mandates involved in the Exhibit 300 Process
- Explore updates in the e-Government Initiative of the President's Management Agenda
- Understand new changes in the Exhibit 300 process

Developing and Using IT Performance Measures

- Discover the importance and value of performance measures relative to IT initiatives
- Develop performance measures to align IT goals with your agency's strategic mission

"Top Ten" Ways to Significantly Improve the Quality of Your Exhibit 300 Submission (Part 1)

- Identify and use ALL relevant guidance and instructions
- Respond to subject areas that cross multiple sections including IT security

"Top Ten" Ways to Significantly Improve the Quality of Your Exhibit 300 Submission (Part 2)

- Learn how to apply project management techniques to complete the Exhibit 300
- Integrate the Exhibit 300 process into your agency's life cycle management processes

DAY TWO

Step-by-Step Project Life-Cycle Walkthrough of the Required Sections of the Exhibit 300

Alternatives Analysis and Financial Calculations

- Identify standards that facilitate completion of calculations
- Develop cost models for the three required alternatives

Investment Description and Justification

- Apply lessons-learned from past exhibits to improve the section's technical and qualitative aspects
- Identify key "must-do" and "should-do" principles
- Identify source documents to help with these sections

President's Management Agenda

- Learn the fundamental concepts of complying with the PMA
- Use PMA principles to strengthen your business case in other areas

Effective Project Management

- Identify the relationship between the program manager, external stakeholders and project team
- Explore a project management approach to facilitate completion

Risk Inventory

- Use a project management approach to complete the risk inventory
- Identify additional risk factors and execute risk-management
- Learn a simple taxonomy for linking outcomes, outputs, assumptions and risks to measures

Acquisition Strategy

- Learn the fundamentals of performance-based contracting
- Learn the fundamentals of a performance-based statement of work
- Apply the fundamentals to completing section I.G.

Examining Part II of the Exhibit 300

- Develop the response to the enterprise architecture section
- Use NIST Special Publication 800-26 to satisfy FISMA and Exhibit 300
- Address GPEA, data quality, privacy and records management

Advanced Performance-Based Budgeting

Integrating performance measures into budget justifications is only the basic level of performance-based budgeting. Using performance information to determine "optimal" resource allocation within a program and among programs remains the ultimate goal of performance-based budgeting systems. Achieving this ultimate goal requires the creation of "mature" performance budgeting systems that have reliable financial information on full program costs, valid program performance information and comparative analysis within and between programs.

Mature performance budgeting systems analyze various component program activities to ensure maximum efficiencies are being achieved—allowing managers to consider alternative activities to achieve program results. Within a similar mission area, performance budgeting compares the cost and performance of a given program against the cost and performance of alternative programs—allowing decision-makers to consider shifting resources between programs. Using a case-study program—or for in-house delivery a program activity from your agency—this course will provide a step-by-step walk through of the development of a mature performance-based budgeting system in government.

MATURE PERFORMANCE-BASED BUDGETING

Internal PBB Analysis
- Cost and Performance of Program Activities
- Exploration of Alternative Program Structures
- Forecasting Performance Improvement from Alternative Program Structure

External PBB Analysis
- Cost and Performance of Program Outputs
- Evaluation of Alternative Programs to Achieve Mission Results
- Forecasting Performance Improvement from a Shift in Resources Among Programs

COURSE AVAILABILITY AND CREDITS

December 8-9, 2005 in Arlington, VA (Code: P1018)
July 13-14, 2006 in Arlington, VA (Code: P1019)

Open Enrollment:
Course Level: Advanced
Prerequisites: All Three "Core" Courses
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class



COURSE AGENDA

DAY ONE

Going Beyond Using PBB to Justify Budgets to Transform Budgets
- Key aspects of mature PBB systems: benefits and limitations
- Understanding the political forces shaping the budget process vs. utility of mature PBB systems
- Authority in OMB Circular A-11 and precedence in Congressional decision-making for mature PBB

Working within Traditional Budget Structures to Achieve Transformational Change
- Understanding the budget accounts and program activities structure of your agency
- Exploring crosswalks or outright changes to agency budget structures

Step 1: Validation of Performance and Cost Baseline for Program
- Evaluating existing cost information of a program to ensure it represents "full cost" for activities and outputs
- Examining performance measures to ensure reliable measurement of program impact and results
- Correcting problems in cost and performance reporting systems to establish a clear baseline of program performance

Step 2: Cost Efficiency Review of Program Activities
- Examining "cost drivers" of a program to identify potential program restructuring
- Exploring alternative activities to deliver program outputs that would maximize efficiencies
- Identifying transition structure and associated costs

DAY TWO

Step 3: Performance Improvement Review of Program Activities
- Examining performance, management and quality deficits in existing program activities
- Exploring alternative activities to correct performance deficiencies of the program
- Identifying transition structure and associated costs

Step 4: Forecasting and Justifying Internal Program Restructuring
- Identifying "base structure" versus "proposed structure" impact on cost efficiency and performance over five years
- Developing budget narratives and justifications for the proposed structure

Step 5: Comparing Program Cost & Performance With Alternative Programs
- Benchmarking performance and cost of existing programs with similar programs in mission area
- Establishing working relationships with potentially impacted programs to explore resource allocation alternatives
- Evaluating funding transfer opportunities
- Evaluating program consolidation opportunities

Step 6: Forecasting and Justifying External Program Restructuring
- Identifying "base structure" versus "proposed structure" impact on cost efficiency and performance over five years
- Developing budget narratives and justifications for the proposed structure

Communicating PBB Recommendations to Budget Decision-Makers
- Internal agency management
- OMB Budget examiners
- Legislative committees



The Government Financial Internal Controls Summit

Managing Taxpayer Dollars to Increase Accountability,Transparency and Performance

March 22-24, 2006
Arlington, VA

Financial management in government has reached a plateau, and the public is demanding accountability, transparency and improved performance from government agencies and programs. From such acts and mandates as the CFO Act, Revised Circular A-123, FMFIA, IPIA and PMA, financial managers are being forced to provide accelerated financial reporting, clean audits and strong internal controls. The Sarbanes-Oxley Act acts as a framework for the public sector, and government financial managers are now expected to achieve compliance. **Register today** for the most innovative and comprehensive financial management conference of the year, hosted by The Performance Institute and numerous good government organizations in Arlington, VA on March 22 – 24, 2006.

You Will Learn:

- Financial Management Standards
- Implementing Internal Controls
- Performance-Based Budgeting
- Activity-Based Costing
- Financial Reporting
- Auditing and Reducing Erroneous Payments
- Understanding the Federal Budget Process and Appropriations Law

Government Performance Summit

THE 2006

Government Performance Summit

The Most Comprehensive Coverage of Federal Performance Management You'll Get All Year!

April 3-5, 2006
Washington, DC

The federal government finds itself beginning a new chapter in its managing for results initiative — a chapter that places performance management front-and-center. The Bush administration has confirmed to managers that the federal government is results oriented and that the progress made on the President's Management Agenda will continue over the next four years. Federal employees want their departments to be as effective as possible, and the American people expect the Government to achieve results. To be results-oriented managers must ask themselves if the programs they administer are achieving the desired result at an acceptable cost.

You Will Learn:

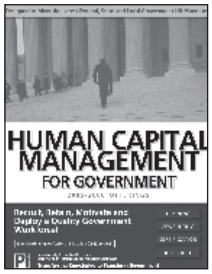
- Budgeting for Results
- Measuring for Results
- Communicating Results
- Linking People to Performance
- Collecting and Managing Data
- Designing Performance Information Systems

Access Full Speaking Faculty and Agendas Online

To Register, Call 703-894-0481 or Visit www.PerformanceWeb.org

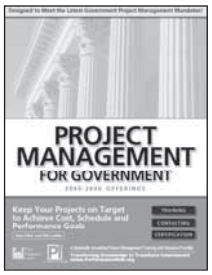
Other Offerings from The Performance Institute

Human Capital Management



Government agencies require the right people, in the right job, with the right skills, at the right time, under the right compensation and evaluation arrangement. That's a lot of rights to get right. That's why the Institute offers the only HR certification designed exclusively for government managers. Courses address human capital planning, succession planning, employee performance evaluation and other key HR management issues vital to making government agencies "employers of choice" rather than "employers of last resort."

Project Management



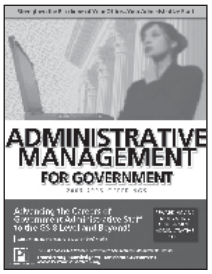
Project management, performance measures, risk assessment, earned value, IT capital plans, contract management, strategy and planning…the list goes on and on! From the recent wave of management reforms sweeping across the federal government and almost every state capital, government project management mandates are on the rise. And now the use of Earned Value Management, a fundamental project management tool, is mandated under federal policy.

Contracting & Acquisition



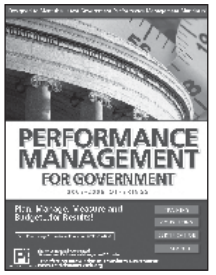
In response to new requirements for performance-based contracting, competitive sourcing and earned value management in government acquisition, the Institute offers a training program designed exclusively for government contracting staff and those wanting to move into this field. Attendees will emerge from courses able to integrate performance measures into government contracts, craft performance-based "Statements of Work" and "Statements of Objective," engage in strategic "Solutions Development" using the acquisition process, and evaluate sourcing alternatives using cost and performance standards.

Government Administrative Management



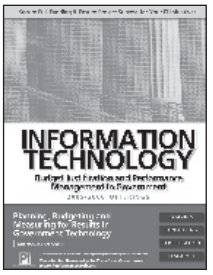
The Institute offers a program designed to improve the efficiency and advance the careers of administrative assistants and office support personnel in government offices. Courses present the latest office management skills, including demonstrating leadership and personal effectiveness, managing conflict and projects, planning events, utilizing office technology and creating a personal development plan.

Performance Management



The Institute's most popular training program assists government managers in measuring and reporting the results of their programs. Through this comprehensive training program, you will master strategic planning, performance measurement, performance budgeting and program evaluation techniques. Designed with the latest government performance mandates in mind, you will emerge from courses armed with the skills to plan, measure, evaluate and budget...for results in government.

Information Technology



One of the most high-risk areas in government management, agencies spend hundreds of millions of dollars on IT each year. OMB is now mandating accountability for the use of those resources through the Exhibit 300 and the E-Government Initiative of the President's Management Agenda. The Institute offers a government IT Management program addressing essential challenges facing today's IT professionals.

Social Services Management



Federal, state, and local social service programs (both run by government and partners of government) face some of the most difficult management challenges. The Institute offers a management training program designed exclusively for social service and public health program managers. Courses address a comprehensive set of issues including performance measures for social service and public health programs, performance-based contracting, measuring and reporting "hard-to-measure" outcomes, grants management and auditing, case management techniques (across program areas), workforce development tools and techniques and forging and management community partnerships.

Homeland Security Academy



With an increasing emphasis being put on homeland security initiatives in government, the Institute offers a training program designed to implement the latest Presidential directives and NIMS guidelines from the Department of Homeland Security. Topics include: emergency management and response, threat assessment and mitigation, incident command, critical infrastructure protection, homeland security grants management, performance measures for homeland security programs and cross-agency coordination and communication techniques.

Access the Catalogs and Complete Course Listings for All of the Institute's Training Programs Online at: www.PerformanceWeb.org/Training

About The Performance Institute

The Nation's Leader in Government Performance Management

The Performance Institute is a private think tank seeking to improve government performance through the principles of competition, accountability, performance and transparency. The Institute serves as the nation's leading authority and repository on performance-based management practices for government. Our mission is to identify, study and disseminate the leading management innovations pioneered by "best-in-class" organizations.

Through its national conferences on pressing issues, interactive training programs for government managers, best practice research and strategic consulting services, the Institute provides cutting-edge expertise in the design, implementation and evaluation of strategies to solve operational challenges and enhance organizational performance.

The Performance Institute is the nation's largest and most influential government reform think tank. More than 10,000 government managers participate in the Institute's forums and research projects each year. With offices on both coasts, the Institute is staffed by experts passionate about reforming government, and maintains an impressive array of expert advisory boards in many policy areas.

The Institute has testified on a wide range of government reform issues before Congress and state legislatures. With its emphasis on performance-based management reforms, the Institute has evaluated numerous government programs and initiatives and has offered recommendations for improving cost efficiencies and performance results. Its white papers and analyses are routinely used by government officials to reform programs, shape policy and drive change.

The Performance Institute
1515 N. Courthouse Road
Suite 600
Arlington, VA 22201
703-894-0481
fax 703-894-0482

Visit The Performance Institute online at:
www.PerformanceWeb.org

About AGA's CEAR® Program

AGA's Certificate of Excellence in Accountability Reporting (CEAR®) Program has been helping federal agencies produce high-quality Performance and Accountability Reports since 1997. The program was established in conjunction with the Chief Financial Officers Council and the U.S. Office of Management and Budget to improve financial and program accountability by streamlining reporting and improving the effectiveness of such reports.

Receive CPE Credits

Continuing Professional Education Accreditation

The Performance Institute is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Nashville, TN 37219-2417. Web site: www.nasba.org

GSA Schedule

Easy Access to Institute Consulting Services through MOBIS

(PI MOBIS Contract Number: GS-10F-0261M)

How Can I Register?

1. **ONLINE** at www.PerformanceWeb.org
2. **VIA FAX** to 703-894-0482
3. **VIA PHONE** to 703-894-0481
4. **VIA MAIL** to 1515 North Courthouse Road, Suite 600, Arlington, VA 22201

DELEGATE INFORMATION

NAME

TITLE

OFFICE

ORGANIZATION

ADDRESS

CITY STATE ZIP

TELEPHONE FAX

E-MAIL

PAYMENT INFORMATION

- ☐ TRAINING FORM
- ☐ PURCHASE ORDER
- ☐ CHECK (Accepted by mail only)
- ☐ CREDIT CARD

CREDIT CARD NUMBER

EXPIRATION DATE

NAME ON CARD

A CONFIRMATION OF YOUR REGISTRATION WILL BE EMAILED TO YOU WITHIN 2 BUSINESS DAYS.

Priority Code: P992 - WEB

COURSE SELECTIONS

Please Register Me for the Following Courses:

PROGRAM CODE	PROGRAM NAME	TUITION
		$1095
		$ 895*
		$ 795*
		$ 695*
		$ 495*
		FREE*

☐ **PLEASE ENROLL ME IN THE FINANCIAL MANAGEMENT CERTIFICATE PROGRAM**

Group discounts are available. For information about discounts for groups of three or more, please contact Blake Zach at (703) 894-0481 or Zach@PerformanceWeb.org

* To qualify for these discounted tuition rates, you must register and submit payment for all of the programs at the same time. If you choose to register for courses individually you will be charged the full amount each time.

Need help customizing your training program?

Call one of our curriculum managers at 703-894-0481.

CANCELLATION AND QUALITY ASSURANCE POLICY

The Performance Institute strives to provide you with the most productive and effective educational experience possible. If after completing the course you feel there is some way we can improve, please write your comments on the evaluation form provided upon your arrival. Should you feel dissatisfied with your learning experience and wish to request a credit or refund, please submit it in writing no later than 10 business days after the end of the training to: Chris DeMaio, Chief Operating Officer, The Performance Institute, 1515 N. Courthouse Road, Suite 600, Arlington, VA 22201 (phone: 703-894-0481). We will evaluate individual complaints in a context of collective comments from the event. Note: A $150 service fee will be charged on cancellations received less than three weeks from the date of the event. A credit memo will also be sent reflective of that amount, which can be used for a future Performance Institute conference.

TRAINING LOCATION

Because the Institute offers convenient locations on both coasts, specific location details for each course will be sent out upon registration. City and state listings for each course are available in the "Individual Course Offerings" section of this catalog. Program participants are eligible for a discounted hotel rate at all locations.

TRANSPARENCY...ACCOUNTABILITY...INTEGRITY...PERFORMANCE IN GOVERNMENT



FINANCIAL MANAGEMENT
FOR GOVERNMENT

Transparency...Accountability...
Integrity...Performance in Government

THE PEFORMANCE INSTITUTE
1515 N. COURTHOUSE ROAD, SUITE 600
ARLINGTON, VA 22201

The Performance Institute

PRST STD
U.S. Postage
Paid
Permit No. 2800
Merrifield, VA