## How You Will Benefit

### Achieve compliance with OMB Mandates and the Federal Acquisition Regulations

Identify key FAR and OMB requirements for Performance-based contracting and earned value management

### Create a Performance Statement of Work

Create specific and clearly defined contract goals stated in terms of desired results

### Devise Best-in-Class Performance Measures

Create effective performance measures for your organization that will motivate contractors and deliver results

### Implement EVM Systems to Manage Contract Requirements

Develop and implement an at-a-glance performance measurement system to evaluate government contracts

## What You Will Learn

- **Seven-Step Process for PBC**
- **Establish Your Contracting Team and Clearly Define Roles**
- **Develop a Performance Work Statement**
- **Establishing Contract EVM Performance Measures**
- **Create Financial and Non-Financial Incentives in Contracts**
- **Update on Service Acquisition Reform**

*2005 Best Practice Forum:*

# Performance-Based Service Acquisition and Earned Value Management Systems

## *Developing, Managing and Monitoring Performance-Based Contracts*

November 14 - 15, 2005 • Arlington, VA

The Performance Institute




Presented by:

The Performance Institute

***Ensure Your Agency Meets OMB's Goal of 40% Performance-Based Contracts!***

www.PerformanceWeb.org

# "What Gets Measured Get Done" . . . Are Your Contracts Using the Right Measures?

## OPTION ONE:

### *Attend the Publicly-Offered Training: November 14-15, 2005, Arlington, VA Performance-Based Service Acquisition Simulation*

Over two days, participants will examine the use of the performance measures used in actual government contracts, and we'll walk through the Government Performance Logic Model, a framework for developing and implementing effective performance measures. Next we'll simulate the Seven-Step Process for PBC and execute the logic model methodology for developing performance measures using real government program examples. Participant teams will be responsible for developing performance measures for performance work statements (PWS) and statements of objectives (SOO) using the logic model methodology. Walk away with feedback from both the instructors and training participants in order to acquire the necessary skills to bring back to your agency. From start to finish, participants will test their skills in developing and implementing performance measures for writing their PWS or SOO using new tactics and techniques.

- Walk through the Seven-Step Process and develop a PWS and SOO based on the logic model performance measure methodology
- Identify and implement key indicators using the "SMART" performance measure criteria
- Acquire tools and strategies for developing performance measures that will change the way you manage and motivate your contractors

## *Day One Agenda : November 14, 2005*

**8:30 Registration & Continental Breakfast**

**9:00 Update on Performance-Based Contracting Best Practices and Requirements**
- Understand the latest from the Office of Federal Procurement Policy and legislation including the Services Acquisition Reform Act (SARA)
- Understand the Office of Management and Budget's proposed rule on earned value management
- Examine best practice models of performance-based contracts

**10:45 Step One: Establish the Team**
- Benchmark the purpose, objective and projected outcome of a contract
- Clearly identify and define the roles and responsibilities of all participants, including vendors
- Create a link between the program's mission and it's individual team members

**12:00 Networking Luncheon**

**1:00 Step Two: Decide which Problem Needs Solving**
- Learn to effectively assess current levels of performance
- Determine the "end-outcome" of your contract
- Link acquisitions to organizational mission and performance objectives

**2:00 Step Three: Examine Private-Sector and Public-Sector Solutions**
- Conduct efficient and productive market-sector research
- Improve contract development by effectively utilizing private-sector input before writing PWSs and crafting SOOs
- Apply experience from public-sector counterparts

**3:00 Step Four: Develop and Select Contract Performance Measures**
- Identify effective performance measures using the "SMART" performance measure criteria
- Understand methodologies for developing end and intermediate outcome performance measures using the Government Performance Logic Model
- Examine how performance measures can successfully motivate and manage government programs and contracts

**4:30 Adjourn**

## *Day Two Agenda : November 15, 2005*

**8:30 Continental Breakfast**

**9:00 Step Five: Develop a PWS and a SOO**
- Learn the key components of a PWS and an SOO
- Hear effective techniques for comparing strengths and weaknesses of both methods
- Gain essential insight regarding the development of a PWS or SOO

**10:45 Step Six: Select the Right Contractor**
- Learn to interpret past performance to predict future results
- Determine the "best value" when presented with a diversity of proposed services
- Tackle potential conflicts of interest

**12:00 Networking Luncheon**

**1:00 Step Seven: Monitor and Manage Performance**
- Learn to establish a clear line of performance accountability
- Incorporate the contractor into the team to improve results
- Maintain continued measurement during the contract to improve further results

**2:30 Earned Value Management Overview: Methodologies, Tools and Terminology**
- Understand the importance of EVM and learn key tools and techniques
- Gain consensus on planned budget, cost, and performance targets
- Learn effective techniques for tracking progress and adapting to unplanned obstacles

**4:30 Adjourn**

### *In Depth Review of Performance Measure Best Practices*

A true test in developing effective performance-based contracts is the creation of efficient performance measures that track success and provide for contractor accountability and results. Through the use of outcome-oriented performance measures, contracting teams can gauge the success and performance of their contracts and ensure that they deliver results to the taxpayer.

- Discuss best practice performance measures from across government that can be applied to assess contract performance
- Identify and adapt performance measures for your agency's contracts
- Discover agency best practices in implementing performance-based contracts

# The Performance Institute
# November 14 - 15, 2005 • Arlington, VA

## OPTION TWO:

### *Bring this Performance-Based Contracting Training Program In-House*

The Performance Institute can design a customized, cost-efficient method to train your staff on performance measure development and performance-based contracting. Training is conducted using actual projects from the client agency during the program providing real life, practical examples for your staff. In-house training sessions will:

- Train and educate staff on the Seven-Step Methodology for developing, implementing and managing performance-based contracts
- Review best practices and examine how to best develop performance measures that will motivate and manage contractors
- Utilize actual and useful examples from your agency

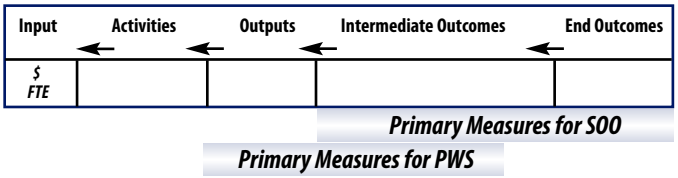
Take away model performance measures that can be adapted for your agency's contracts and improve your chances to succeed. One of the true tests in developing effective performance-based contracts has been the creation of efficient performance measures that track success and provide for contractor accountability and results. The use of outcome-oriented performance measures can gauge the success and performance of contracts and ensure results to the taxpayer.

### KEY METHODOLOGY COVERED:

The performance-based contracting training is based on writing a contract that focuses on performance goals using the cutting edge seven-step framework which serves as a template for agency contracts. The Government Performance Logic Model is applied to define contract goals that will simplify the drafting of your Statement of Work (SOW), Statement of Objective (SOO) and Performance Work Statement (PWS).

**Building a Performance-Based Contract**

***Seven Steps Using the Logic Model***




*Step 1:* Establish the Contrcting Team
*Step 2:* Identify Scope and Anticipated End Outcomes
*Step 3:* Examine Private-Sector Solutions
*Step 4:* Select Performance Measures (Intermediate Outcomes, Outputs and Work Processes
*Step 5:* Develop a PWS or SOO
*Step 6:* Select a Contractor
*Step 7:* Monitor and Manage Performance

### ARE YOUR CONTRACTS TRULY PERFORMANCE-BASED?

Invite the Institute's performance management experts review your contracts and provide insight how to improve performance and efficiency through more effective measures. To find out more about in-house offerings, please contact Blake Zach at 703-894-0481 or e-mail him at Zach@PerformanceWeb.org for a free needs assessment.

**CPE Credits:** 13 **Delivery Method:** Group-live
**Program Level:** Intermediate **Prerequisites:** None
**Advanced Preparation:** None
**National Registry of CPE Sponsors**

The Performance Institute is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional 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. Website: www.nasba.org

### Venue:

*Performance-Based Service Acquisition and Earned Value Management Systems* will be hosted at the Performance Institute in Arlington, Va., just one block east of the Courthouse stop on the Orange Line of the D.C. Metro. A public parking garage is located inside of the building. Continental breakfast and a catered lunch will be provided for delegates on each day.

**The Performance Institute**
1515 N. Courthouse Rd., Suite 600
Arlington, VA 22201
Phone: 703-894-0481

### Hotel:

A limited number of rooms have been reserved at a discounted rate of $153 at the Holiday Inn Rosslyn at the Key Bridge. Please contact the hotel directly and use the code ILCORPER when making reservations at the hotel.

Holiday Inn Rosslyn at the Key Bridge
1900 North Fort Myer Drive
Arlington, VA 22209
1-800-368-3408
www.holiday-inn.com/rosslynkbridge

### Tuition and Group Discounts:

The fee for attending *Performance-Based Service Acquisition and Earned Value Management Systems* is $1095. Reduced tuition rates for delegates who attend in groups of three or more are also available by calling Jeremy Taylor at 703-894-0481 or emailing him at Taylor@PerformanceWeb.org. Be sure to use program code **C151** when you register.

### Cancellations and Quality Assurance:

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.

# Performance-Based Service Acquisition and Earned Value Management Systems

## REGISTRATION FORM

*To Register:*

1. Call Jeremy Taylor at 703-894-0481
2. visit www.performanceweb.org
3. or fax this form to 703-894-0482

**DELEGATE INFORMATION**

PRIORITY CODE: C151-WEB

NAME

TITLE

ORGANIZATION

ADDRESS

CITY STATE ZIP

PHONE

FAX

E-MAIL

**METHOD OF PAYMENT**

☐ Check ☐ Purchase Order/Training Form ☐ Credit Card

NAME ON CARD

CARD NUMBER EXPIRATION