Integrate Agency Budgets with Performance Plans

2003 Best Practices Forum on

Performance-Based Budgeting

Achieving Effective Budget-Performance Integration in Government

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Sponsored By:

The Performance Institute

Featuring a Simulation Workshop: Creating Your Own Performance-Based Budget Request

Master the Program Assessment Rating Tool (PART)

Learn from a detailed walk-through of a best-practice PART questionnaire

Integrate Budget and Performance through Cost Accounting and the Logic Model

Establish the frameworks necessary to integrate performance and agency budgets

Examine the Past, Present and Future of Performance-Based Budgeting

Discuss the role of the PART and budget-performance integration in FY04 and beyond

Get Up to Speed on the Budget Developments from the Bush Administration

Integrate the PART to fulfill past performance mandates

Enhance Your Program's Budget Justifications Through Performance

June 25-27

Arlington, VA

5 Reasons to Attend this Forum

1. Study guidance from OMB officials on budget-performance integration
2. Walk through a successful PART questionnaire from the FY04 Budget
3. Clearly define performance goals and purpose using the Logic Model methodology
4. Calculate and manage full costs of programs using simplified Activity-Based Costing
5. Create a performance-based budget in a special simulation workshop

Who Should Attend

- Budget Analysts
- Program Managers
- Budget Officers
- Legislative Officers
- Accountants
- Fiscal Affairs Manager
- Budget Division Directors
- Budget and Performance Chiefs
- And anyone involved with improving the budget-performance integration of his or her program

Improve the Performance and Accountability of Your Program

Dear Government Executive,

With the release of the Program Assessment Rating Tool (PART) in 2002, the administration established the clear commitment to performance and accountability for federal programs. Providing tangible, evidence-based evaluations in the areas of program purpose, planning, management and results, the PART serves as an aid in the tough budgetary decisions in FY04 and beyond. By demanding measurable results, goals and accountability for resource allocation, the PART integrates the core aims of budget-performance integration and GPRA performance plans.

This year, 234 programs were assessed by OMB, yielding overwhelmingly alarming results—55 percent were deemed as ineffective or not demonstrating results, while 6 percent were seen as effective. For failing programs, the universal root causes of failure were poor planning, bad measures and weak management. Though the FY04 budget process represented PART's pilot attempt at performance and accountability, the questionnaire will be back for FY05, evaluating 20 percent of programs again, in addition to a re-assessment of the previous 20 percent. If you are not improving your performance now, you need to be. In order to equip federal managers with the skills necessary to overcome these deficiencies, the Performance Institute invites you to attend the *2003 Best Practices Forum on Performance-Based Budgeting in Government*, being hosted June 25-27, 2003 in Arlington, Virginia.

RECEIVE HANDS-ON PART TRAINING

Whether your programs have or have not been assessed by PART, it is imperative that you possess the skills and knowledge to fully explain your program in this questionnaire. This hands-on training will provide you with an overall explanation of OMB's designs for PART in FY04 and beyond, as well as PART's integration with past performance mandates, such as GPRA and PMA. With an increased capacity in its designs, walk through the PART questionnaire, step-by-step evaluating a successful program. Focus on best practice results to gain the strategies necessary to improve your performance.

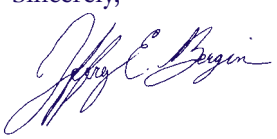
ESTABLISH YOUR OWN PERFORMANCE FRAMEWORKS

Performance-based budgeting requires more than a high program assessment score; it involves implementing a successful framework to fully link resources to results to justify your program's performance. This hands-on training will apply Logic Model Methodology to define agency mission, outcome goals and intermediate strategies to accomplish those goals. Also, learn how to fully track your resources by utilizing Activity-Based Costing and Management. Hear from leading experts in the field and how to simplistically implement these frameworks.

The 2003 Performance-Based Budgeting Forum is a "can't miss" event for anyone involved in budget and performance integration. Utilize the methodology and strategies provided to increase the performance and accountability for your program, as well as justify your budget requests. Register online at ***www.performanceweb.org*** or by calling us at 703-894-0481.

I look forward to seeing you in June!

Sincerely,

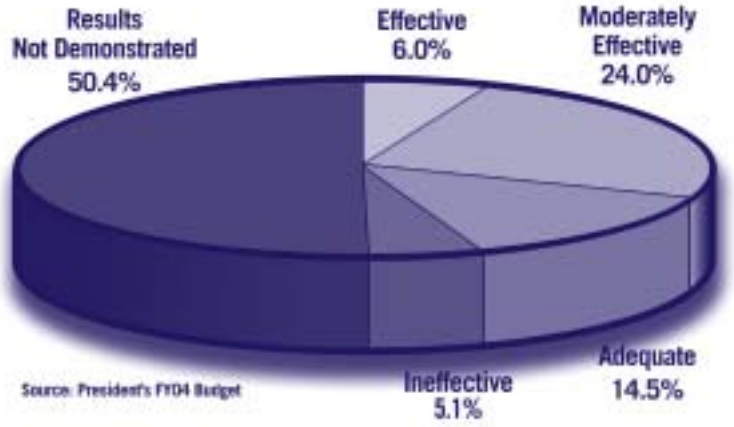


Jeffrey E. Bergin
Associate Director, Center for Government Performance
The Performance Institute

Acquire the Strategies Neces

Agenda and Speaking Faculty

How Did Programs Score on the FY04 PART?



Day One: June 25, 2003

8:30 Registration and Continental Breakfast

9:00 Keynote Address: Achieving Effective Performance Integration in Government

The Program Assessment Rating Tool (PART) evaluated the performance of 234 programs for F04, by examining the four pillars of a program: purpose, planning, management and results. The PART serves as a tool to help integrate the budget and performance initiative as outlined in the PMA. This keynote address will examine PART's overall assessment for FY04 and look at the expectations by OMB and the administration for FY05 and beyond.
Justine Rodriguez, *Office of Management and Budget*

10:00 Integrating PART to GPRA and PMA

PART is a standardized, methodological tool that is evidence-based in its assessment. In providing evidence, federal programs need to turn to effective GPRA performance plans which serve as the blueprint to performance planning and management. PART serves as a tool to hold GPRA performance plans and PMA implementation progress accountable by evaluating their success
Mortimer Downey, *PB Consulting, Former Chairman of the Performance Measurement Advisory Council (PMAC)*

11:00 Break

Step-by-Step Application of PART

Facilitator: Carl D. DeMaio, The Performance Institute/Reason Foundation
Program to be Studied: National Weather Service

11:15 PART Element One: Program Purpose and Design

Is the program's purpose and design clear and defensible?
Programs destined for failure are often maligned by a flawed purpose and design. Inability to address a specific interest or need in a program results in a lack of focus. Discuss how to ensure that your program is starting off on the right foot by formulating a strong, unique and defensible mission.

12:15 Luncheon

1:15 PART Element Two: Strategic Planning

Are valid long-term goals set for the program?
Through the passage of GPRA in 1993, government agencies are required to draft a strategic plan to outline their long-term goals, yet many of these goals remain vague. Learn how to establish meaningful annual and long-term goals and performance measures in your GPRA plan.



For more information about the Program

2:15 PART Element Three: Program Management

Are the agency's program management, financial oversight and program improvement efforts successful?

To ensure that your agency is integrating performance and budget, information needs to be collected and evaluated on your program. To safeguard your agency against budget shortfalls and dwindling performance, learn how to accurately collect performance information as well as estimate and budget for your operation costs.

3:15 Break

3:30 PART Element Four: Program Results

Are the performance goals set during strategic planning being met?

In order to validate the success of your program's purpose, planning and management, examine its results. Establish targets and actual goals for performance and effectiveness. Learn how to reach performance goals annually while continuing to plan for the future.

4:45 Adjourn

Day Two: June 26, 2003

8:30 Continental Breakfast

9:00 Step One: Develop Mission, Outcome Goals, Intermediate Outcomes Using Logic Model Methodology

- Define agency mission and purpose ensuring it provides a unique, specific contribution
- Establish societal outcome for your program based on overall purpose of the program
- Provide limited, yet clearly defined pieces of evidence highlighting programmatic aims

Carl DeMaio, *The Performance Institute/Reason Foundation*

10:00 Step Two: Aligning Program Outputs and Activities to Program Goals using a Logic Model Approach

- Successfully integrate budget and performance using a resource tracking framework, such as Activity-Based Costing
- Establish definitive levels of products and services that can be produced and measured within the program
- Define the actual workload level that is to be carried out by the program and program partners

Carl DeMaio, *The Performance Institute/Reason Foundation*

12:00 Lunch

1:00 Step Three: Full Cost Accounting

- Best practices on implementing the Activity-Based Costing Management model (ABC/M) to support strategic and performance plans
- Discover how to integrate ABC/M within the context of your performance budgeting efforts
- Utilize the simplified approach to calculate cost-per-unit output and correlate those costs to key strategies and outcomes.

Case Study 1: Cost Accounting Innovations at the Department of Veterans Affairs

Richard Norwood, *U.S. Dept. of Veterans Affairs*

Case Study 2: Bureau of Land Management's Implementation of ABC/M

Betty Buxton, *U.S. Dept. of Interior/Bureau of Land Management*

3:30 Break

3:45 Step Four: Integration of PMA Initiatives

- Align your strategic objectives and activities across PMA initiative areas
- Communicate the PMA effectively across management silos to successfully implement and track progress
- Fully tie-in agency GPRA plans to PMA progress

Jeffrey Bergin, *The Performance Institute*

4:30 Adjourn

t with Program Performance

Day Three: June 27, 2003 Simulation Workshop

Interactive Simulation in Formulating and Justifying a Budget throughout the Entire Budget Process

This simulation will cover topics encompassing the federal budget process, focusing on involvement of numerous parties, such as OMB, Congress, Budget Analysts and Interest groups. By working in groups and utilizing "role play" scenarios, this budget simulation will cover the following topics from budget formulation to budget submission to budget acceptance:

- Overview of Federal Budget Process
- OMB Review and Passback
- Interest Groups and Interest Group Attacks
- Team Luncheon: Form Working Budget Teams and Roles
- Congressional Appropriations Hearing, Marking and Floor Debate
- Controversial Appropriations Rider Added During Conference Committee to Program Budget Request Drawing Presidential Veto Threat
- Recap of Budgets

Use this budget simulation to learn the pitfalls and valuable lessons when forming your performance-based budget involving all principal actors.

Performance Integration

The Government Performance and Results Act, President's Management Agenda, and Program Assessment Rating Tool can work together to improve performance. The deeper the integration with mission results, the more successful your program will be.



"We will continue to focus on getting results from federal spending. A federal program's measure of success is not its size, but the value it delivers."

President George W. Bush

VENUE

The *2003 Best Practices Forum on Performance-Based Budgeting* will be held at the Performance Institute in Arlington, VA, just one block east of the Courthouse Metro stop on the Orange Line. A public parking garage is located inside the building. Continental breakfasts and catered lunches will be provided for all delegates.

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

HOTEL

A limited number of rooms have been reserved at the Quality Courthouse Hotel at a discounted rate of $129. Please contact the hotel with the number provided to make reservations. Be sure to ask for the Performance Institute conference rate. The hotel will ensure that your conference experience is not only educational but also comfortable and enjoyable in every aspect.

Quality Courthouse Hotel
1200 Courthouse Road
Arlington, VA 22201
703-524-4000

TUITION

The tuition rates for government employees attending the *2003 Best Practices Forum on Performance-Based Budgeting* are:

Forum Only:	$1095
Forum and Workshop:	$1595
Workshop Only:	$500

GROUP DISCOUNTS

Reduced tuition rates for delegates who attend in groups of three or more are available. Please call Bret Johnson at 703-894-0481 or e-mail him at johnson@performanceweb.org.

ADMINISTRATIVE NOTE: A 10 percent cancellation fee on conference and workshop tuition will be charged for cancellations received less than three weeks from the start date of the conference. As speakers are confirmed six months before the event, some speaker changes or topic changes may occur in the program. The Performance Institute is not responsible for speaker changes, but will work to ensure a comparable speaker is located to participate in the program.

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June 25-27, 2003
Arlington, VA

The Performance Institute
1515 North Courthouse Road, Suite 600
Arlington, VA 22201

REGISTRATION FORM

for the 2003 Best Practices Forum on Performance-Based Budgeting in Government

Call 703-894-0481; fax this form to 703-894-0482;
or visit www.performanceweb.org

☐ Yes! Register me for the best-practices forum.
☐ Yes! Register me for the forum and the simulation workshop.
☐ Yes! Register me for the simulation workshop only.
☐ Please call me. I am interested in a group discount.

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