Integrate Agency Budgets with Performance Plans!

2004 Best Practices Forum:

PERFORMANCE-BASED BUDGETING and PART Simulation

Achieving Effective Budget-Performance Integration in Government



May 3-4, 2004
Arlington, VA

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 the FY05 OMB Passback

Ten Steps to Developing a Performance-Based Budget
Align agency activities and outputs to overall goals and mission to facilitate the development of a performance-based budget

PLUS
a Post-Conference Workshop:
Understanding the Federal Budget Process

Presented by
The Performance Institute

www.performanceweb.org

Enhance Your Program's Budget Justifications for OMB Passback

"We want to make sure when we spend money, that it meets needs. . . . that's what the American taxpayer expects. They expect results"
–President Bush

"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 Bush

"Government should be results-oriented-guided not by process but guided by performance. There comes a time when every program must be judged either a success or a failure. Where we find success, we should repeat it, share it, and make it the standard. And where we find failure, we must call it by its name"
—President Bush

Who Should Attend:

- Budget Analysts
- Program Managers
- Budget Officers
- Legislative Officers
- Accountants
- Fiscal Affairs Manager
- Budget Division Directors
- Budget and Performance Chiefs

Improve Performance and Accountability in 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. By demanding measurable results and goals as well as accountability for resource allocation, the PART integrates the core aims of budget-performance integration and GPRA performance plans.

The FY04 Budget release saw 234 programs scored by the PART with alarming results on underperforming programs, as well as a direct correlation to their budget. With the release of the FY05 budget, that commitment to performance continued. With 165 additional programs rated, PART saw an increase in effective programs, and more accountability for overall results. While this improvement is a good sign, there is a long way to go towards overall performance. Programs that were rated as ineffective saw their budget decrease by 37%, including 13 programs that were zeroed out due to repeated poor performance. If you are not improving your performance now, you need to be. In order to equip federal managers with the skills necessary to improve program performance, the Performance Institute invites you to attend the *2004 Best Practices Forum on Performance-Based Budgeting and PART Simulation,* being hosted May 3-4, 2004 in Arlington, Virginia.

HANDS-ON TRAINING IN PART

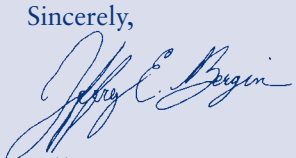
Whether your programs have or have not been assessed by the PART, it is imperative that you possess the skills and knowledge to fully explain your program in this questionnaire. This hands-on training will provide you with an overall explanation of OMB's designs for the PART in FY05 and beyond, as well as the 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.

ESTABLISHING 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 the Logic Model methodology to define agency mission, outcome goals and intermediate strategies to accomplish those goals. You will then walk through the "Ten Steps to Developing a Performance-Based Budget" and be able to not only align resources to results, but calculate full costs for existing activities.

The *2004 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 by calling us at ***703-894-0481*** or visit us online at ***www.performanceweb.org***. I look forward to seeing you in May!

Sincerely,



Jeffrey E. Bergin
Director
The Performance Institute

Acquire the Strategies Nece

Day One: May 3, 2004

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

The Program Assessment Rating Tool (PART) evaluated the performance of 165 programs in FY05 and 400 since its inception. The focus lies in 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 outlined in the PMA. This keynote address will examine PART's overall assessment and its role in the last two budget submissions.
*Justine Rodriguez, Deputy Associate Director for Economic Policy, Office of Management and Budget**

Jeffrey Bergin, Director of the Center for Government Performance at The Performance Institute, will be facilitating the rest of the forum.

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 with serve as the blueprint to performance planning and management. PART serves as a tool to hold GRPA performance plans and PMA implementation progress accountable by evaluating their success.

Step by Step Application of PART

11:15 PART Element One: PROGRAM PURPOSE AND DESIGN

Is the program's purpose and design clear and defendable?

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 and defendable mission.

12:15 Luncheon

1:15 PART Element Two: STRATEGIC PLANNING

Are valid and 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.

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.

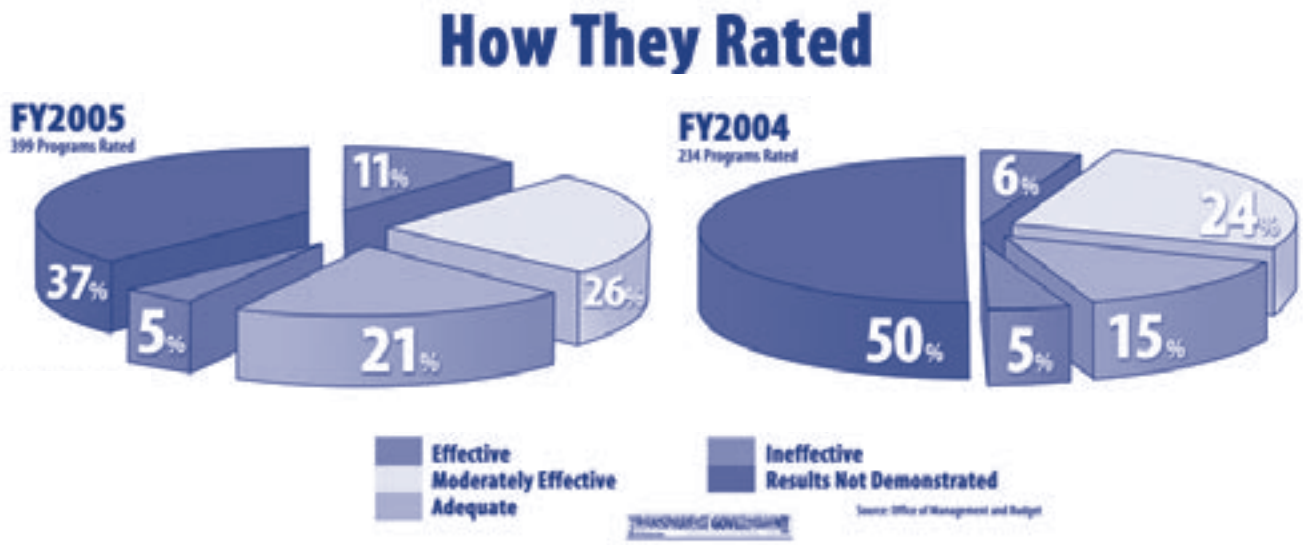
3:15 Break

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

essary to Integrate Your Budget



Day Two: May 4, 2004

9:00 Creating a Performance-Based Budget: Ten Step Process to Integrate Performance and Budget Information

This session will examine the steps essential to creating a performance-based budget in your organization. Through this analysis, you will be able to examine your current organizational structure, management structure and performance plans in order to develop a truly performance-based budget that looks at all aspects of your organization. The steps are:

- 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
- Set Targets (Revise after Budget Finalization)
- Budget Account Restructuring/ Alignment
- Budget Justification
- Budget Execution

12:00 Networking Luncheon

1:00 Calculate and Correlate Program Costs by Using a Performance Framework

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

2:00 Break

2:15 APPLICATION SESSION: Develop Your Own PART

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

4:00 Adjourn

with Program Performance

Bring this Program In-House to Develop a Performance-Based Budget!

The Performance Institute offers customized one-, two-, and three-day education programs to federal and state agencies that wish to train staff members in their own facility. In-house training provides a curriculum tailored specifically to your office, program or agency in a cost-efficient way. Using the Logic Model and other cutting-edge tools and strategies, our experts will work with you to produce a budget that is tied in with your organization's annual and long-term goals, and makes the business case for your appropriated dollars. If you'd like, your existing management framework and budget submissions can be analyzed and built upon during the training. Your staff will complete the training with a performance-based budget that can be implemented immediately. They will also acquire the tools to adapt, evolve and ultimately create new, highly effective management framework and budgets on their own. For more information about the in-house training options available to you, please call James Lewis at *703-894-0481* or email him at *Lewis@PerformanceWeb.org*.

Administrative Note: A 10 percent cancellation fee on registration will be charged for cancellations received less than three weeks from the 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.

How to Register

Call the Performance Institute at *703-894-0481* or visit us online at *www.PerformanceWeb.org*. Please have your credit card ready.

Venue

Performance-Based Budgeting and PART Simulation will be hosted at the Performance Institute in Arlington, Virginia, 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
703-894-0481

Hotel

The Performance Institute is located just two blocks from the Quality Courthouse and Hilton Garden Inn, where a limited number of rooms have been reserved at discounted rates of $129 for the Quality Courthouse and $159 for the Hilton Garden Inn. Call the hotel directly to make reservations and be sure to ask for the Performance Institute conference rate.

Hilton Garden Inn
1333 N Courthouse Road
Arlington, VA 22201
703-528-4444

Quality Courthouse
1200 N. Courthouse Rd.
Arlington, VA 22201
703-534-4000

Tuition

The fee for attending *Performance-Based Budgeting and PART Simulation* is $1095.

Group Discounts

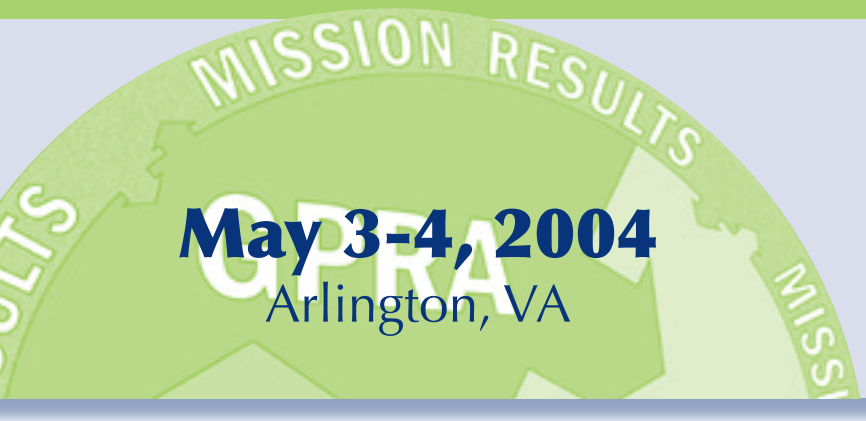
Reduced tuition rates for delegates who attend in groups of three or more are available by calling James Lewis at *703-894-0481* or email him at *Lewis@PerformanceWeb.org*.

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Arlington, VA 22201

REGISTRATION FORM
for *2004 Best Practices Forum on Performance-Based Budgeting and PART Simulation*

Call (703) 894-0481; Fax This Form To: (703) 894-0482; or visit: www.PerformanceWeb.org

❑ Yes! Register me for the Forum only
❑ Yes! Register me for the Forum and Understanding the Federal Budget Process Workshop
❑ Please call me. I am interested in a special group discount for my team

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