COMPLY WITH NEW MANDATES OF THE 2002 e-GOVERNMENT ACT!



Government Technology Performance

Training Series

Interactive Training on Best Practices for Managing Government Information Technology Initiatives

Acquire a Comprehensive Methodology for Planning, Measuring, Budgeting, Contracting, and Managing Government IT Projects

Sponsored by:

The Performance Institute

Official Media Partner:

GOVERNMENT TECHNOLOGY®

Spring 2003

The Performance Institute

Arlington, Virginia

COURSE OFFERINGS:

- **IT Capital Planning and Project Management**
  Implementing Results-Oriented IT Planning and Portfolio Management
- **Managing Architecture for e-Gov Business Processes**
  Improve design and management of enterprise architecture and use of IT to support agency processes
- **IT Security and Risk Management**
  Comply with new IT security mandates while minimizing risk of failure in IT initiatives
- **Performance Measures for IT and e-Government**
  Align well-developed performance measures with IT strategy to produce concrete reportable results.
- **IT Outsourcing and Contract Management**
  Comply with the new A-76 process for IT outsourcing and using performance-based IT contracts
- **Effective Budget Justifications (OMB Exhibit 300s)**
  Make a better business case and obtain the funding your IT program deserves

Select from Public-Offered Course Agendas and Schedules or Bring the Program In-House!

- **STAY AHEAD OF NEW MANDATES**
- **ACQUIRE BEST PRACTICES**
- **EXAMINE PROVEN SOLUTIONS**
- **IMPLEMENT NEW METHODOLOGIES**

...Guaranteed to Enhance the Success of Your Agency's IT Projects!

Why IT Performance Matters!

From the Clinger-Cohen Act to the President's Management Agenda and now the **2002 e-Government Act**, policymakers at all levels of government are emphasizing sound strategic planning, performance measurement and project management for government IT spending.

Now more than ever, IT managers in government are being asked to make a solid—and measurable—business case for their IT investments and are held accountable for delivering quantifiable IT performance.

Government Technology Performance Training Series

Dear Government IT Manager:

Access Interactive Training on Best Practices for Managing Your Agency's IT Initiatives

Capital Plans. Performance Measures. Risk Assessments. Budget Justifications. Government IT managers confront a number of requirements in designing, managing and improving the performance of technology initiatives in government agencies. With the recent passage of the 2002 e-Government Act, IT managers will be under increased scrutiny to comply with the requirements of this groundbreaking piece of legislation

To assist you with these new requirements and other key government IT performance management challenges, the Performance Institute is hosting a comprehensive training program where government managers can access cutting-edge research, best practices and clear methodologies improving the planning, budgeting, measurement and management of IT projects.

Choose from Five Courses Addressing the Key Challenges Facing Government IT Managers

The Government Technology Performance Training Series features six two-day courses on the most pressing challenges facing IT managers in government. Each course presents a clear methodology for addressing a particular technology performance management challenge. Using case studies, the courses illustrate practical ways to identify and overcome common obstacles to IT success. Most importantly, the courses emphasize an "applied learning" approach, in which participants are encouraged to work on an actual program from their agency.

Featuring the Latest Innovations in Effective Government IT Planning and Management

The Institute conducts extensive research throughout agencies at every level of government to identify and analyze successful IT initiatives. This research base informs the training courses, providing for fresh case studies and an up-to-date assessment of the true "state of practice."

Receive Hands-On Instruction in Practical Models for IT Success

The courses will be small and hands-on, offering you the time and attention to address your specific needs and expand your knowledge of the differing methods and best practices for IT performance management. Most important, these courses will equip you with the skills and knowledge to shape effective change and strategy in your agency or organization.

By attending one or more of the courses of this series, you will emerge with a clear vision and honed skills in capital planning, performance measurement, project management, architecture, security, outsourcing, and more. Space will be limited in the public-offered courses, so register today. Or consider bringing the series into your agency as an in-house training. To register yourself and your team, or to inquire about in-house trainings, call us today at 703-894-0481or visit us online at www.performanceweb.org.

Sincerely,



Benjamin Neumann
Director, Center for Technology Strategy

Offering Comprehensive Coverage of Pressing IT Challenges

Title	Description	Date Offered/Location
IT Capital Planning and Project Management	• Aligning IT Plans with Agency Plans • Using IT Capital Planning Frameworks to Drive Program Management • Managing IT Investments and Portfolios	March 24-25, 2003 Arlington, VA
Managing Architecture and e-Gov Business Processes	• Creating a Target Enterprise Architecture • Managing Architecture Initiatives: Critical Success Factors • Designing Initiatives Under the New 26 Government-wide e-gov Business Processes	March 26-27, 2003 Arlington. VA
IT Security and Risk Management	• Assessing and Improving Security of Agency IT Systems • Complying with Standards and Guidelines Set Forth in the 2002 e-Government Act • Assessing and Managing IT Risk	April 14-15, 2003 Arlington, VA
Performance Measures for IT and e-Government	• Designing Outcome-Oriented IT Performance Measurements • Monitoring IT Performance Results • Benchmarking IT Performance	April 28-30 Washington, D.C. June 2-3 San Diego, CA
IT Outsourcing and Contract Management	• Devising an Acquisition Strategy and Sourcing IT Solutions • Crafting Performance-Based Statements of Work and Managing Contracts	May 19-20, 2003 Arlington, VA June 4-5 San Diego, CA
Effective IT Budget Justifications (OMB Exhibit 300s)	• Presenting IT Projects using Exhibit 300 Criteria • Building an Effective "Mission-Aligned" Business Case • Navigating Agency and OMB Review Processes	May 21, 2003 Arlington, VA

Prepare for New Mandates Under the 2002 e-Government Act

All courses in the Government Performance Training Series have been updated to provide comprehensive coverage of the new 2002 e-Government Act. That Act accomplishes the following:

- Creates an e-Government Fund in the U.S. Treasury, which authorizes $345 million for e-Gov projects over a four year period
- Requires agencies to develop e-Gov performance measures and consider measuring performance in customer service, agency productivity, and use of innovative technology
- Requires agencies to provide information security protections and privacy impact assessments, as well as report on its information security activities in budget and management reports
- Allows for "share-in-savings" contracts, which allow agencies to reward contractors based on savings realized

10 Reasons to Attend the *Government Technology Performance Training Series*

1. **Ensure Compliance:** Stay ahead of the latest rules and regulations of the newly signed 2002 e-Government Act
2. **Augment Project Management:** Utilize best practice project management strategies to accomplish IT goals and milestones
3. **Improve IT Strategy:** Develop and implement dynamic IT strategy in your agency
4. **Enhance Budget Justifications:** Build a better business case for your IT plan and your IT program
5. **Design Performance Measures:** Measure and report the performance of your IT investments
6. **Improve Security:** Develop a safe, secure, integrated IT architecture
7. **Manage Risk:** Improve the probability of success for your IT investments
8. **Enhance Competition:** Develop effective IT outsourcing strategy and deliver results through performance-based IT contracts
9. **Achieve e-Government Goals:** Integrate your agency's IT strategy with the Administration's Citizen-Centered e-Government Initiatives
10. **Put Yourself on the Fast Track:** Stay at the leading edge of innovation in government IT management

1. IT Capital Planning and Project Management

Capital Planning and Investment Management are the cornerstones of managing IT performance in government. 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. You will emerge able to build a solid business case for your IT projects to guarantee that they will be aligned with agency mission and that information technology is integrated into a comprehensive strategic plan that supports overarching agency goals and missions.

COURSE AGENDA:

1. IT Capital Planning Guidance and Mandates
   a. Updates from the 2002 e-Government Act
   b. Clinger-Cohen Requirements
   c. OMB Circular A-130, A-11 and Exhibit 300s
2. Frameworks for Capital Planning and Investment Management
   a. IT Investment Management (ITIM) Framework
   b. Information Technology Investment Portfolio System (ITIPS)
   c. GAO Lessons Learned
   d. Other Frameworks and Approaches
3. Designing and Using Capital Plans
   a. Alignment to Agency Mission and Goals
   b. Assessment Phase for IT Requirements
   c. Setting IT Goals and Strategies
4. Defining Investment Management Strategies
   a. Creating Investment Awareness
   b. Assessing Your Investment Portfolio (Gap Analysis)
   c. Managing Projects Using Investment Criteria

You will emerge from this course able to:

- Devise Capital Plans and Manage within Investment Foundations
- Build an Effective Business Case for Your IT Needs
- Utilize Comprehensive Portfolio and Project Management to Make IT Decisions

March 24-25, 2003
The Performance Institute
Arlington, VA

Led by an Expert Speaking Faculty

Our speaking faculty is top-rate, featuring a "who's who" roster of instructors from all levels of government from across the nation. Each brings a recognized and tested wealth of knowledge and experience in formulating and implementing IT management strategies. In addition, key officials from oversight bodies (OMB, CIO Council, GAO, Congress) are featured in many courses to provide the most up-to-date news on pending developments.

"It is one of the most significant pieces of legislation passed since Clinger-Cohen. It covers so many angles of information that it goes beyond many of the other pieces of legislation."

—David McClure, vice president for e-government at the Council for Excellence in Government on the 2002 e-Government Act

2. Managing Architecture and e-Gov Business Processes

Defining, building and managing agency IT architecture has proven to be a significant concern for most government CIO's and IT specialists. In this course, participants will acquire best practices for assessing and improving agency IT architecture strategy and ensuring that business processes are well supported. The methodology presented in this course will enable you to develop and manage a safe, effective enterprise architecture in your agency in order to achieve your agency's mission, comply with federal mandates, and respond faster to changes in technology and mission needs.

COURSE AGENDA:

1. IT Enterprise Architecture Guidance and Mandates
   a. Updates from the 2002 e-Government Act
      1. Using Architecture to Minimize Duplication and Use Emerging Technologies
      2. Privacy and Security Requirements
      3. Office of Electronic Government
   b. Federal Enterprise Architecture (FEA) Framework
   c. Clinger-Cohen Requirements
   d. OMB Circular A-130, A-11 and Exhibit 300s
2. Frameworks for Managing IT Architecture in Government
   a. Defining Architecture Process and Approach
   b. Characterizing IT Baselines
   c. Creating Target Architecture
   d. Determining Gaps between Your Current and Target Architectures
   e. Developing and Implementing a Migration Plan
   f. Implement Your Architecture Plan
   g. Review and Update Regularly
3. Using IT Architecture to Align and Assess IT Performance
   a. Utilizing Performance Measurements and Frameworks
   b. Aligning IT with Architecture and Agency Mission
   c. Using Architecture to Drive IT Decision-Making
4. Designing Initiatives under the New OMB Business Reference Model
   a. Program Administration
   b. Compliance
   c. Support Delivery of Services
   d. Internal Operations/Infrastructure

You will emerge from this course able to:

- Improve the Design, Implementation and Refinement of Agency IT Architecture to Fit the Unique Mission of Your Agency
- Ensure the Acquisition of Technologies to Adequately Support Business and Information Needs
- Increase the Speed and Credibility of Information Sharing Across Agencies so You Can Work Faster, Cheaper and More Reliably

March 26-27, 2003
The Performance Institute
Arlington, VA

3. IT Security and Risk Management

Privacy of program information and security of agency systems is an increasingly important issue for government technology managers. With the passage of the 2002 e-Government Act, Congress has called for more stringent requirements for information security, which means that agencies will be under increased scrutiny to develop more secure systems. In this course, you will hear first-hand from representatives of the National Institutes of Standards and Technology (NIST) about how to comply with the new e-Gov Act mandates.

COURSE AGENDA:

1. IT Security Guidance and Mandates
   a. Updates from the 2002 e-Government Act
      1. NIST Standards and Guidelines
      2. Government Information Security Reform Act (GISRA)
      3. Federal Information Security Incident Center
2. Assessing and Improving IT Security
   a. Strategic Planning and Risk Assessment
   b. Emerging Standards and Guidelines
   c. Leading Practices and Lessons Learned in Implementation
3. Frameworks for Managing Secure IT systems
   a. Creating and Managing Internal and External Controls
   b. Developing and Implementing Rigorous Security Policy
   c. Establishing Awareness of IT Security Issues
   d. Ensuring Security and Integrity of Data, Processes and Technologies
   e. Aligning Security with IT Budget and Integrating with Other Mission Critical IT Functions
   f. Integrating IT Security into IT Mission, Management and Budget
   g Using Performance Measures to Maximize the Impact of Your IT Security Strategy
4. Risk Management
   a. Identifying Business and Mission Critical IT Systems
   b. Minimizing Risk Exposure by Protecting Yourself from Internal and External Threats
   c. Aligning IT Risk Strategy with e-Business Goals and Objectives

You will emerge from this course able to:

- Ensure the Safety of Your Valuable Information Resources and the Security of Your Critical Infrastructure.
- Comply with New and Emerging Federal Requirements and Guidelines for IT Security and Performance Management.
- Maximize the Return on Investment by Implementing Strategic Performance Measures and Performance Management.
- Align IT Security Measures with Budget and Mission to Ensure Success

April 14-15, 2003
The Performance Institute
Arlington, VA

4. Performance Measures for IT and e-Government

Performance measures are the primary vehicle for aligning IT investments to tangible improvements in agency efficiencies and effectiveness. Moreover, when combined with a risk management strategy, performance measures can provide IT management informed strategic management decisions at every step of way, from planning to implementation to review. This course provides a thorough framework—known as the Performance Logic Model—for defining performance measures for IT projects that are aligned to program mission and goals. You will emerge with model performance measures for common IT initiatives as well as a command of useful methods for defining your own performance measures.

COURSE AGENDA:

1. 1. IT Performance Measurement Guidance and Mandates
   a. Updates from the 2002 Government Act
      1. Federal Mandates to Measure IT Performance
      2. Linking Performance Goals to Key Groups (G-to-C, G-to-B, and G-to-G)
   b. Clinger-Cohen Requirements
   c. OMB Circular A-130, A-11 and Exhibit 300s
2. Frameworks for Performance Measurement and Risk Management
   a. CIO Council Framework
   b. The Performance Logic Model Approach
   c. Other Frameworks and Approaches
   d. Value Measuring Methodology
3. Designing and Using Performance Measurements for IT Initiatives
   a. Alignment to Agency Performance Measures
   b. Measuring Cost Efficiencies and Program Performance Improvements
   c. Establishing a Measurement and Benchmark System for IT Functions
   d. Collecting, Reporting and Managing Performance Information
   e. Tracking and Evaluating the Collection of Performance Measures for IT Projects
   f. Best Practices and Lessons Learned
4. Model Performance Measures
   a. Cross Agency IT Collaboration
   b. Customers and End-Users
   c. Cost Savings and Operational Efficiencies from IT
   d. Access Channels, Lines of Business, and Underlying Processes

You will emerge from this course able to:

- Measure the Mission-Critical Performance of Your IT Projects Using Efficiency and Program Effectiveness Measures
- Implement Model Performance Measures for Key IT Functions and Benchmark Your Agency's IT Performance
- Enhance IT Success and Keep IT Programs on Target, on Time, and on Budget with Performance Measures and Risk Management

April 28-30
Wyndham City Center Hotel
Washington, D.C.

June 2-3
San Diego, CA

5. IT Outsourcing and Contract Management

Effective January, 2003, the rules for competitive sourcing for federal government IT will be dramatically changed. The new rules defined under OMB Circular A-76 are designed to make the process for managing public-private competitions and direct conversion outsourcing more streamlined, cost-efficient and performance-based. These changes, combined with the competition targets and outsourcing initiatives defined in the President's Management Agenda, will require all federal agencies to more actively implement a comprehensive program for regularly competing their commercial activities. This course will provide a methodology for ensuring that effective IT outsourcing strategy and contract management are integrated into the IT planning process, the budget, and that they support both IT and agency mission. Participants will develop skills for performance-based contract management as well as valuable skills in implementing performance measures for procurement and contracting.

COURSE AGENDA:

1. IT Outsourcing and Contract Management Guidance and Mandates
   a. Updates from the 2002 e-Government Act
      1. Share-in-Savings Contracts
   b. Clinger-Cohen Requirements
   c. New A-76 Guidelines
   d. Federal Acquisition Regulations (FAR)
   e. Federal Acquisitions Streamlining Act (FASA)
2. Comprehensive Strategy for IT Outsourcing and Contract Management
   a. Align with Agency Mission and Strategic Goals
   b. Evaluate the Contract Environment
   c. Determine the Agency Need
   d. Analyze Requirements
   e. Planning for Source Selection
   f. Include Proper Terms and Conditions in Solicitations
3. Competitively Sourcing Information Technology Using an "Integrated" Process
   a. Performance Work Statements (PWS) for Information Technology
   b. Identify Industry Benchmarks
   c. Obtain a Clear Definition of IT
   d. Utilize Low-Cost Criteria to Make Sound Costing Decisions for IT Competitions
   e. Using Government-Wide Schedules to Streamline Competition
4. Framework for Performance-Based Contracting and Outsourcing
   a. Tests that a Performance-Based Contract Must Meet
   b. Different Models Exist for Performance-Based Contracts
   c. Critical Success Factors for Designing and Managing a Good PBSC
   d. A Comprehensive Framework for Linking Contracts to Agency Goals and Measures

You will emerge from this course able to:

- Develop a Comprehensive Outsourcing and Contract Management Strategy Aligned with Agency Budget, Mission and Strategic Goals
- Design and Implement Performance Measurements Frameworks for Contracting and Acquisition Strategy
- Maximize IT Funding through Strategies Such as Performance-Based Contracting and "Share-in-Savings"

May 19-20, 2003
Arlington, VA
The Performance Institute

June 4-5
San Diego, CA

6. Application Session: OMB Circular A-11 and Exhibit 300

In pursuit of efficient and effective e-government initiatives, OMB have established rigorous guidelines for federal agencies to use in planning and justifying IT expenditures and strategies. Use this course to help you and your agency meet and exceed guidelines and requirements, developing a compelling business case for your IT needs, and reporting your enhanced IT performance. Learn to tie together all the criteria of OMB Circular A-11 in Exhibit 300 and ensuring that your IT plan is not only well-developed, but well-reported. Utilize exhibit 300 reporting to conduct a thorough evaluation of your programs and management. Ensure the funding and future of your IT initiatives and the continued success of your IT programs by aligning your strategy and management with guidelines, and then delivering the performance results.

COURSE AGENDA:

1. Capital Asset Management Guidelines and Mandates
   a. Update from the 2002 e-Government Act
   b. The Government Performance Results Act
   c. The Federal Managers Financial Integrity Act
   d. The Paperwork Reduction Act
   e. The Federal Acquisition Streamlining Act
2. Deliver comprehensive capital planning and budget reporting
   a. Justification
   b. Program Management
   c. Acquisition Strategy
   d. Alternatives Analysis and Risk Management
   e. Enterprise Architecture
   f. Security and Privacy
   g. Government Paperwork Elimination Act
3. Report on Cost, Schedule, and Performance Goals
   a. Manage Projects as if They Were Portfolio of Investments
   b. Ensure Projects are Viable, Appropriate and Achievable
   c. Plan, Check the Plans, and Check the Plans Again
   d. Have Strong Qualified Project Managers
   e. Develop Systematic Agency Project Management Process
   f. Performance Measures for Project Management

You will emerge from this course able to:

- Effectively Report Your Agency's Capital Programming and Investment Decision-Making Process
- Ensure that Spending on Capital Assets Directly Supports Your Agency's Mission and Will Provide a Good Return on Investment
- Identify Poorly Performing Projects and Capital Assets that No Longer Fulfill Mission Requirements or Do Not Deliver Intended Benefits

May 21, 2003
The Performance Institute
Arlington, VA

"An excellent set of speakers who were very effective in presenting complex material."
—Joe Baldino, Dept. of Defense/BAE Systems

About the Performance Institute

Our Mission

The Performance Institute is a private think tank that serves as the nation's leading authority and repository on performance-based management practices for government agencies. Our mission is to identify, study and disseminate the leading management innovations pioneered by 'best-in-class' public-sector organizations.

Through national conferences on pressing issues, interactive executive training programs, 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, improve customer service and enhance organizational performance.

A Focus on Government Technology

Through its Center for Technology Strategy, the Institute studies the transformational impact of information technology in not only enhancing the internal operations of government programs, but also transforming the way government interacts with citizens.

Applying performance management frameworks, the Center fuses the latest information technology with mission-driven organizational objectives of government managers. In doing so, the Center assists agencies with IT budgeting and capital planning, performance measurement, and technology strategy to comply with government guidelines and regulations, and achieve long-term success in IT program goals and missions.

Bring the Government Technology Performance Series In-House

All of the programs offered in this catalog are available on an in-house basis. In-house training provides a customized, cost-efficient method to educate staff on the new rules IT and e-Government, as well as to provide a forum for team building and project planning. Training is conducted by seasoned experts in e-Government and IT. Wherever possible, actual "projects" from the client agency are used during the training program—providing real life examples for agency staff. For more information on in-house training options, contact James Lewis at 703-894-0481.

Institute Research



"Creating a Performance-Based Electronic Government"

In May 2002, a coalition of good government groups launched a research project to identify the "best practices" in defining and measuring e-government initiatives. A research team surveyed CIOs and IT staff from every federal agency to determine how they design, plan, justify, manage, and measure the success of their e-government initiatives. This report presents the findings of that research—providing case studies from various agencies and articulating a framework for the development and use of IT performance measures. To access this groundbreaking report, visit www.performanceweb.org



Government Technology Performance

Training Series

Interactive Training on Best Practices for Managing Government Information Technology Initiatives

Fees for attendance to the *Government Performance Technology Training Series*

Single Workshop: $1095
Two Workshops: $995/each
Three Workshops: $895/each
Four Workshops: $795/each
Five Workshops: $695/each
One-day Application Session: $495

Registration Form for the *Government Performance Technology Training Series*

☐ Yes! Register Me for the Following Training Program(s).
(Please mark your choices clearly).

- ☐ IT Capital Planning and Project Management (T135)
- ☐ Managing Architecture and e-Gov Business Processes (T137)
- ☐ IT Security and Risk Management (T138)
- ☐ Performance Measures for IT and e-Government (☐ T136 D.C. or ☐ T143 San Diego)
- ☐ IT Outsourcing and Contract Management (☐ T139 D.C. or ☐ T144 San Diego)
- ☐ Effective IT Budget Justifications (OMB Exhibit 300s) (T142)

☐ Yes! Register Me for the Following Application Session

- ☐ Application Session: OMB Circular A-11 and Exhibit 300 (T127)

☐ Yes! Please sign me up for free e-mail updates on PI research on Information Technology Issues. My email address is below

☐ Please call me. I am interested in a special Group Discount for my Team.

Name _____

Title_____Dept _____

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Telephone:_____ Fax:_____

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Method of Payment: ☐ Check ☐ Purchase Order/ ☐ Credit Card Training Form

Card Number _____

Exp Date _____ Name on Card_____

For more information or to register, please call 703-894-0481 or fax this registration form to 703-894-0482. Or visit us online at www.performanceweb.org.

Performance Measures for IT and e-Government will be convened at the Wyndham City Center Hotel in Washington, D.C.

All other Washington, D.C. area events will be held at:

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

For information on San Diego area events, please contact the Performance Institute at 703-894-0481.

The Performance Institute
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