Comply with New Government Performance Mandates for 2003!

Government Performance Series

Comprehensive Forums and Interactive Training on Development and Implementation of Government Performance Management Initiatives

Scheduled Forums

1. **Strategic Planning and Change Management**
2. **Performance-Based Budgeting Simulation**
3. **"Show Me the Measures" — Model Performance Measures for Government Functions**
4. **Employee Performance Evaluations and Development**
5. **Performance-Based Contracting**
6. **Performance Measures for Information Technology**
7. **Designing, Auditing and Improving Performance Information Systems in Government**

Summer/Fall 2003

Plus: Comprehensive Solutions for Successful Performance Measurement Challenges

Presented by:

The Performance Institute

Attend Publicly Offered Forums or Bring a Forum In-House!

A Rising Tide Toward Performance at all Levels of Government

Federal

- The President's Management Agenda spells out in clear terms the importance of instituting performance-based systems in all areas of government.
- Programs are now being rated by the Office of Management and Budget using the Program Assessment Rating Tool. The White House is factoring PART scores into budget allocations — emphasizing the importance of performance.

State

- Performance-based governing strategies are being used by states nationwide to dig out of the crippling budget shortfalls. State agency managers are discovering that cuts need not be "across the board" if performance measurement, budget, contracting, IT and human capital processes are integrated ahead of time.

Local

- Programs on the city and county levels have reaped tremendous rewards by using performance measures in their program management activities. Managers are learning that it is possible to actually increase citizen services despite falling revenues!

For More About Performance Measures, Including Additional Events and Training Programs, Visit www.PerformanceWeb.org

Dear Government Executive,

The growing trend toward increased performance management has been seen on the federal, state and local levels of government – a trend that places accountability for performance on results.

Performance Mandates for Federal Managers

For federal managers, the President's Management Agenda (PMA) has demanded accountability along with a higher performance rating from federal government agencies across five major management areas. To illustrate the accountability and transparency of the PMA, the administration created the Program Assessment Rating Tool (PART) to gauge the measurability of results of federal programs. This diagnostic tool asks a series of direct questions that assess program purpose, planning, management and results – the four legs of a successfully managed program. The results from the first PART analysis were factored into the FY04 allocations received by programs, illustrating a clear emphasis on performance, accountability and transparency.

Budget Restrictions for State and Local Managers

As the federal government grapples with increasing accountability for federal dollars, state and local governments are working feverishly to counteract some of the worst budget shortfalls in recent memory. While the definition of performance varies from state to state, the commitment to performance management is becoming universal. As recently as two years ago, 46 states had adopted performance management systems, while 31 of them had adopted a performance-based budgeting system. These performance management initiatives are imperative for state and local governments as more and more programs are cut because of a mismanagement of funds in a time of increased fiscal crisis.

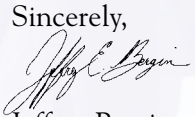
Applied Approach Using Frameworks and Case Studies

Performance management systems at all levels of government focus on reaching an end-outcome and devising successful strategies to reach those outcomes. As the nation's leading authority on performance measures for government, the Performance Institute offers the *Government Performance Series* to focus on the applied approach to government performance using established frameworks and case studies from key innovators in the field of performance-based government. The *Government Performance Series* will feature best-in-class practitioners and expert facilitators focusing on the five pillars of performance management:

- Improving Financial Management
- Integrating Budget and Program Performance
- Strategically Managing Human Capital
- Competitive Sourcing
- Expanded Citizen-Centered Electronic Government

Whether you attend one of our public-offered forums or opt to have a customized training program brought into your agency, you will receive expert training that will allow you to implement and manage real changes. For more information about any of these forums, please visit us online at www.performanceweb.org, or call 703-894-0481.

Sincerely,



Jeffrey Bergin
Associate Director
Center for Government Performance

Attend More than One Public-Offered Forum and Receive a Discount!

A Comprehensive Series of Programs…Linked by Performance

Forum	Description
1 Strategic Planning and Change Management June 11-12, 2003 Arlington, VA Call for availability of in-house training	• Establishing an effective strategic plan • Devising an integrated, cross-cutting management plan • Assessing the culture of your organization to manage change
2 Performance-Based Budgeting Forum & Simulation June 25-27, 2003 Arlington, VA Call for availability of in-house training	• Earning a high score on the PART questionnaire • Linking resources to results with the Logic Model • Tracking expenditures with Activity-Based Costing and Management
3 "Show Me the Measures!" – Model Performance Measures for Government Functions July 16-17, 2003 Arlington, VA Call for availability of in-house training	• Constructing effective management plans • Promoting performance and accountability in your program • Defining effective performance measures
4 Employee Performance Evaluations and Development July 28-29, 2003 Arlington, VA Call for availability of in-house training	• Developing effective performance goals and measures for employees • Implementing a system of accountability • Designing a Human Capital Plan
5 Performance-Based Contracting August 13-14, 2003 Arlington, VA Call for availability of in-house training	• Complying with OMB Competitive Sourcing mandates • Managing performance-based service contracts • Implementing PBC frameworks
6 Performance Measures for IT and e-Government September 15-16, 2003 Arlington, VA Call for availability of in-house training	• Implementing model performance measures for IT • Keeping IT programs accountable • Utilizing program effectiveness measures
7 Designing, Auditing & Improving Performance Information Systems in Government September 23-24, 2003 Arlington, VA Call for availability of in-house training	• Staying current with OMB data quality rules • Establishing frameworks for data standardization • Aligning information systems with performance measures

Bring Content From These Forums 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 emerging mandates, as well as provide a forum for team building and project planning. Training is conducted by seasoned experts in all of the initiative areas. 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, contact Blake Zach at 703-894-0481.

1 Strategic Planning and Change Management

Align your program management to your agency's mission. Create an effective strategic plan to integrate government performance and accountability in your organization's operations. This forum will provide Logic Model methodology to implement a strategic plan for your organization, focusing on end outcomes and strategies to meet those results. Drawing on your strategic plan, you will be able to implement key strategies for managing change across all reform areas in your organization.

Forum Agenda:

1. Compliance with Emerging Mandates and Trends
   a. Learn to manage change to all areas of the President's Management Agenda (PMA)
   b. Create an effective strategic plan for agency goals and objectives
   c. State and local developments
2. Framework for Integrating Strategic Planning and Change Management
   a. Focus on Logic Model methodology
   b. Devise strategies for end outcomes
   c. Link resources to results
3. Methodology-Based Training
   a. Creation of performance-based strategic plan
   b. Develop a lasting performance management process
   c. Devise an integrated, cross-cutting management plan to all five initiatives
4. Implementing Change Management Across Agency Reform Issues
   a. Assess the culture of your organization
   b. Manage change across the five PMA initiative areas

You will emerge from this forum able to:

- Align your strategic plan to performance to better meet guidelines established in the PMA
- Assess the readiness and response to change in your organization to meet performance goals
- Implement your performance-based strategic plan in your daily operations to meet desired results

June 11-12, 2003
The Performance Institute
Arlington, Virginia

www.PerformanceWeb.org/performancemanagement/

2 Performance-Based Budgeting Forum and Simulation

With the release of the FY04 Budget, it is more important than ever to ensure that your department is integrating its budget with performance. Of the 234 programs assessed by the Program Assessment Rating Tool (PART) in the budget, more than 50 percent could not demonstrate measurable results or were deemed "ineffective." This event will help you align your programs' budget requests with performance measures, and fully allocate your resources to results. Obtain a full knowledge of accountability frameworks such as Activity-Based Costing, and walk step-by-step through the PART to ensure improved performance.

Forum Agenda:

1. Compliance with Emerging Mandates and Trends
   a. Program Assessment Rating Tool (PART)
   b. FY04 Budget
   c. Budget-performance integration
   d. State and local developments
2. Frameworks for Integrating Budget and Performance
   a. Activity-Based Costing and Management (ABC/M)
   b. Government Performance Logic Model
3. Methodology-Based Training
   a. Review of emerging guidance for performance budgeting
   b. Define outcomes for program strategies and outputs
   c. Alignment of performance and cost in a formal budget justification
4. Implementing Performance-Based Budgeting
   a. Create effective performance measurements
   b. Assess program performance by utilizing PART
   c. Adopt ABC/M to link your activities to your resources

You will emerge from this forum able to:

- Link your resources to results for your agency's budget requests
- Implement best practice frameworks to track your activities to your costs
- Comply with federal mandates and "get to green" in budget-performance integration

June 25-27. 2003
The Performance Institute
Arlington, Virginia

www.PerformanceWeb.org/financial/

3 "Show Me the Measures!" — Model Performance Measures for Government Functions

If your agency's programs are like most, you are probably struggling to define relevant and meaningful performance measures. You probably also have trouble driving performance concepts down to the operational level, and achieving genuine employee and stakeholder buy-in through the use of plans, strategies and measures. Too often, programs report being overwhelmed by the data burden of performance measures. This forum will help you develop meaningful performance measures for nearly every operations function and every mission area in government.

Forum Agenda:

1. Compliance with Emerging Mandates and Trends
   a. Government Performance Results Act
   b. President's Management Agenda
   c. State and local developments
2. Frameworks of Model Performance Measures
   a. Government Performance Logic Model
3. Methodology-Based Training
   a. Strategize
      i. What gets measured gets done
      ii. Create well-defined end outcomes
   b. Communicate
      i. Communicate goals and expectations (internal)
      ii. Performance measures help meet public expectations (external)
   c. Motivate
      i. Evaluate the effectiveness of managers and teams
      ii. Measures ensure external parties are acting in a coordinated and integrated fashion
   d. Manage
      i. Good measures provide timely, reliable data
      ii. Managers use measures to make accurate financial and programmatic decisions
4. Implementation of Performance Measurement in Government
   a. Define performance measures suitable to your agency
   b. Construct Logic Model for your agency or program
   c. Utilize performance measures and Logic Model as an effective managerial tool

You will emerge from this forum able to:

- Identify effective performance measures for your organization
- Construct an effective management plan promoting performance and accountability
- Define and devise suitable performance measures

July 16-17, 2003
The Performance Institute
Arlington, Virginia

www.PerformanceWeb.org/performancemanagement/

4 Employee Performance Evaluations and Development

Your employees' success is often times a reflection of your own leadership skills, and it is important to realize that the President's Management Agenda further emphasizes employee success as a vital indication of workforce stability. As a human resources manager, it is of the utmost importance to recognize employee potential and transform those employees into the leaders of tomorrow. Learn the techniques and viewpoints necessary to keep your employees productive and satisfied. Build upon the experience of others to ensure a capable and customer-oriented environment.

Forum Agenda:

1. Compliance with Emerging Mandates and Trends
   a. OPM guidance and handbooks
   b. Implementation updates on human resource management
   c. State and local developments
2. Frameworks to Establish Effective Employee Development Plans
   a. Fundamentals
      i. Understand the changing role of employee development in government
      ii. Analyze established goals
   b. Performance Alignment
      i. Linking employee performance goals to professional development
      ii. Creating performance goals and measures
3. Methodology-Based Training
   a. Understand the factors crucial to conducting effective employee evaluations in government.
   b. Explore methods used to evaluate employee performance
   c. Create actual employee performance contracts
4. Implementing Employee Development Plan and Performance Evaluations
   a. Create performance goals and measures for employees performance plans and evaluations
   b. Establish rules and regulations for plans and evaluations
   c. Apply your employee performance evaluation plan

You will emerge from this forum able to:

- Improve employee performance by implementing an effective system of accountability
- Channel employee strengths into office success through employee performance plans
- Compensate for the forthcoming wave of federal retirees by forming effective strategies for succession planning

July 28-29, 2003
The Performance Institute
Arlington, Virginia

www.PerformanceWeb.org/humancapital/

5 Performance-Based Contracting

This wildly popular forum is focused on the cutting-edge, seven-step framework for performance-based service contracting process developed by the Department of Commerce. The forum addresses one of the most important challenges facing agencies today – the need for widespread adoption of performance-based acquisition in order to meet mission and program needs. Topics that will be discussed during these sessions include the development of a performance work statement (PSW) and statements of objectives (SOO), also learn how to select the right contractor and decide how to measure and manage performance.

Forum Agenda:

1. Compliance with Emerging Mandates and Trends
   a. Compliance with revisions to OMB Circular A-76
   b. Analysis of FAIR and FAR acts
   c. State and local developments
2. Frameworks for Performance-Based Contracting (PBC)
   a. The Seven Steps to Performance-Based Contracting
      i. Performance-based service criteria
      ii. Different options and models
      iii.Critical success factors
   b. Statement of Work and Statement of Objective Training
3. Methodology-Based Training in PBC
   a. Review and manage competition
   b. Performance measurement linking contract to program results
   c. Craft financial and non-financial incentives
4. Implementing Competitive Sourcing
   a. Establish effective performance information system
   b. Acquire fundamentals of effective project management
   c. Evaluate, monitor and manage for performance

You will emerge from this forum able to:

- Gain a framework for devising and managing contracting with performance measurements
- Master the latest performance measurements from the government, state and private sector
- Boost the productivity of your contracts and find solutions to common contract problems

August 13-14, 2003
The Performance Institute
Arlington, Virginia

www.PerformanceWeb.org/contracting/

6 Performance Measures for Information Technology and e-Government

Performance measures are the primary vehicle for aligning IT investments to tangible improvements in agency efficiencies and effectiveness. Performance measures can provide an IT management informed strategic management decisions at every step of the way, from planning to implementation to review. This forum provides a thorough framework for defining performance measures for IT projects that are aligned to program mission and goals.

Forum Agenda:

1. Compliance with Emerging Mandates and Trends
   a. 2002 e-Government Act
   b. Clinger-Cohen requirements
   c. OMB Circular A-120, A-11 and Exhibit 300s
   d. State and local developments
2. Frameworks for Performance Measurement and Risk Management
   a. CIO Council framework
   b. The Government Performance Logic Model framework
   c. Other frameworks and approaches
   d. Value-measuring methodology
3. Methodology-Based Training
   a. Review of federal framework plans
   b. Development of performance measures aligned to program results
   c. Hands-on training on specific IT mandates
4. Implement Model Performance Measures
   a. Cross-agency IT collaboration
   b. Customers and end-users
   c. Cost savings and operational efficiencies
   d. Access channels, lines of business, and underlying processes

You will emerge from this forum 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 measure and risk management

September 15-16, 2003
The Performance Institute
Arlington, Virginia

www.PerformanceWeb.org/technology/

7 Designing, Auditing and Improving Performance Information Systems in Government

To ensure that your agency can utilize effective performance measures, it is imperative that the information be readily accessible. One of the biggest complaints from senior decision makers and line managers is the lack of timely and useful performance information available on programs. This forum will provide managers with the tools necessary to implement data quality standards, as well as measuring quality performance standards for your organization.

Forum Agenda:

1. Compliance with Emerging Mandates and Trends
   a. Data quality rules
   b. Production of clean audits for performance
   c. State and local developments
2. Frameworks for Performance Management
   a. Data standards
   b. Maturity models
   c. Common performance measures
3. Methodology-Based Training
   a. Establish a quality threshold
   b. Meaningful measures
   c. Managing with measures
4. Implementing Data Quality and Auditing Standards
   a. Utilize technology to improve performance dystems
   b. Devise performance measures consistent with data quality and audit standards

You will emerge from this forum able to:

- Ensure that performance measures correspond to program goals
- Provide information and data in user-friendly and useful formats
- Implement performance information systems in your organization

September 24-25, 2003
The Performance Institute
Arlington, Virginia

www.PerformanceWeb.org/technology/

Venue

All programs within the *Government Performance Series* 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.

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

A continental breakfast and catered lunch will be provided for all delegates.

Hotel

A limited number of rooms have been reserved at the Quality Courthouse, located just two blocks from the Institute, at a discounted rate of $129 per night. Please contact the hotel directly at the number below to make reservations, and be sure to ask for the Performance Institute conference rate.

Quality Courthouse Hotel
1200 N Court House Rd
Arlington, VA 22201
703-524-4000

Tuition

One Forum: $1095
Two Forums: . . . . . .$995 each
Three Forums: . . . . . .$895 each

Four or more forums: Call Blake Zach at 703-894-0481 for a great rate!

Group Discounts

Reduced tuition rates for delegates who attend in groups of three or more are available by calling Blake Zach at 703-894-0481 or e-mailing him at zach@performanceweb.org

Administrative Note: A 10% cancellation fee on registration will be charged for cancellations received less than three weeks from the date of the conference. As speakers are confirmed 6 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.

Registration Form for the *Government Performance Training Series* Call (703) 894-0481; Fax This Form To: (703) 894-0482; or visit www.PerformanceWeb.org
☐ Yes! Register me for the conference.
☐ Please call me. I am interested in a special group discount for my team.
Name _____ Title _____
Organization _____
Dept. _____
Address _____
Address _____
City _____ State _____
Telephone: _____ Fax: _____
Email: _____
Method of Payment:
☐ Check ☐ Purchase Order/Training Form ☐ Credit Card
Card Number _____
Exp Date _____ Name on Card _____

Register Online at
www.performanceweb.org
or call (703) 894-0481

PI's Leadership in Performance-Based Government

The Performance Institute

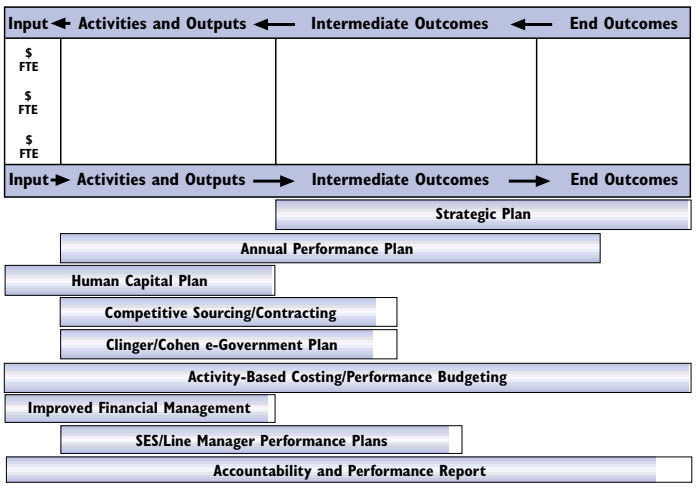
The Performance Institute is a private think tank that serves as the nation's leading authority and repository on performance-based management practices for government agencies. Our mission is to identify, study and disseminate the leading management innovations pioneered by "best-in-class" public-sector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

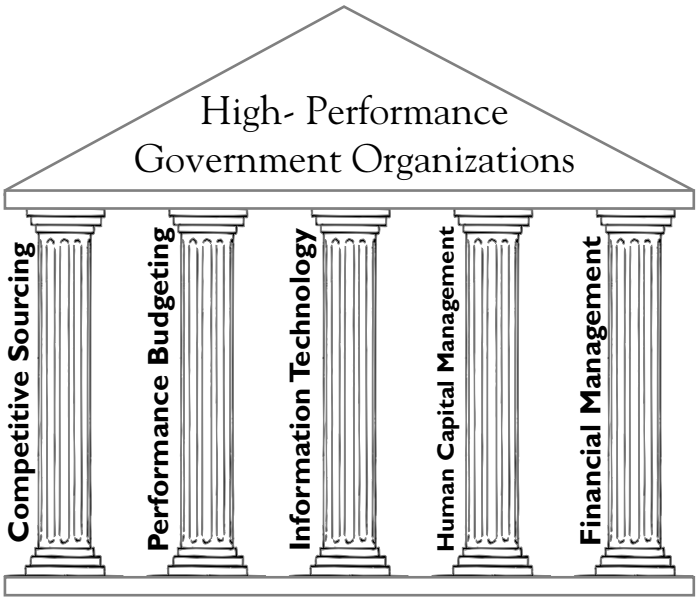
The Institute offers consulting and training to federal agencies, allowing them to access comprehensive and experience-tested methodologies for achieving radical transformations within their programs and workforce. To achieve these transformations, the Institute specializes in:

- Focusing on Outcomes
- Identifying Breakthrough Strategies
- Evaluating Program Effectiveness
- Redesigning Program Structures
- Aligning Resources to Results
- Facilitating Stakeholder Dialogue
- Managing Organizational Change
- Enhancing Employee Performance

The Government Performance Logic Model ™



Source: Carl DeMaio, The Performance Institute



The PI Training Center



All of the publicly offered forums described in this prospectus will be hosted in the Performance Institute Training Center.

Located on the sixth floor of Courthouse Tower in the heart of Arlington's "Courthouse" section, the training center is just one block east of Metro and is easily accessible by car. You'll never have to worry about parking because there is a public garage in the building!

1515 N. Courthouse Road
Suite 600
Arlington, VA 22201

The Institute is an Expert on the Program Assessment Rating Tool (PART)!

For more, visit www.TransparentGovernment.org