Meet OSTP and PART Performance Mandates

National Summit on

R&D Performance Management in Government

Selecting, Planning, Managing and Measuring R&D and S&T Projects Using Performance-Based Criteria



PERFORMANCE MEASUREMENT

- *Develop Strategic Performance Metrics for Your R&D Investment Criteria*

R&D PROJECT MANAGEMENT

- *Align Proven Measures with Effective R&D Program Management*

COST CALCULATIONS

- *Implement a Comprehensive Cost-Estimating Strategy*

Plus

Hands-On Application of Selecting, Managing and Measuring your R&D Portfolio at the Post-Summit Workshop

May 24-25, 2004
Arlington, VA

WWW.PERFORMANCEWEB.ORG

Presented by
The Performance Institute

In Association with:
D&G SCIENCES
www.dgsciences.com

Identify Effective Ways to Secure Funding for "Innovation-Oriented" Projects

Complete Coverage of New R&D Mandates:

OSTP

"President Bush's 2005 budget request commits 13.5% of total discretionary outlays to R&D - the highest level in 37 years." *—The President's Management Agenda*

- Secure Your Budget by Developing Performance Indicators and a Defensible Mission

PART

"New applied research and development projects…will be expected to perform in the top 25 percent of the program's existing R&D, with the goal of improving the quality of the research portfolio." *—The President's Management Agenda*

- Select and Manage Successful R&D Programs to help your agency "Get to Green"

SBIR

"The Small Business Reauthorization Act Requires that 2.5% of Your Extramural Budget be Used to Fund Small Business Innovative Research Projects." *—The Small Business Reauthorization Act of 1997*

- Obtain the Skills Needed to Select Successful R&D and S&T Projects

Comply with OSTP and PART Performance Mandates to Report Measurable Results for Your R&D Funding!

Dear Government Research and Development Professional,

With the implementation of the Program Assessment Rating Tool (PART), federal R&D and S&T programs of all kinds are being held accountable for their performance and management of allocated funds and resources. Within the context of performance measurement and assessment, research and development and science and technology programs face a challenge in the measurement and management of programs based on annual performance goals and bottom-line results. Whether your department is currently implementing performance-based management systems or is in the planning process, you will benefit from the 2004 National Summit on R&D Project Management for Government, being hosted on May 24-25 in Arlington, Virginia.

Performance Management

Based on guidance from Office of Management and Budget and Office of Science and Technology Policy officials, programs are working toward turning the corner on measuring and managing for results in both basic and applied research. To meet these requirements, it is imperative for all programs to align themselves with performance management strategies (and their strategies with their program's mission) to ensure repeated success and measurable results every year.

R&D Project Management

While the PART evaluates programs to assess budget expenditures, agencies must rely on their own project management to ensure that their R&D and S&T programs continue to perform at their most efficient level. To safeguard your program against failure, it is imperative that you recognize challenges and pitfalls, and transform them into solutions. At this event, we will study performance criteria for basic and applied research programs and learn how to turn those metrics into an easy-to-follow roadmap for effective project management.

Cost Calculations

Establishing performance measures and strategies is essential to improving the relevance, quality and performance of R&D and S&T projects. To ensure the vitality of your agency's programs, you must harness leading innovations and strategies for integrating performance measures and goals into each step of the R&D investment criteria. At the summit, we will walk through performance frameworks such as the Government Performance Logic Model and BiPSA to integrate performance and management, with a focus on attainable end outcomes.

This year's summit promises to be a valuable opportunity for peer-to-peer exchange of ideas that focuses on leading strategies and best practices. Register today by calling 703-894-0481 or visit us online at www.PerformanceWeb.org.

I look forward to seeing you in May!

Sincerely,

Kimberly Angarella

Kimberly Angarella
Associate Director
Center for Government Performance
The Performance Institute

This is a "Can't Miss" Event for both Basic and Applied R&D and S&T Programs!

Develop A Better Business Ca

Agenda and Speaking Faculty

Day One: May 24, 2004

8:30 Registration and Continental Breakfast

9:00 Keynote Address: "Managing the Spirit of Innovation"

Managing change and innovation are essential to the success of any program or project. Finding new ways to do old things; this is the spirit of innovation. Coupled with this spirit, however, is the reality that one must develop measurements to promote efficiency. Hear how to balance the promise of your project with its inherent risks and manage the spirit of innovation.

Dr. Gideon Samid, President, D&G Sciences

9:45 Developing Performance Measures for R&D and S&T Programs

- Define and measure end and intermediat outcomes
- Align program strategies to performance measures
- Understand how Logic Modeling overcomes traditional pitfalls and difficulties with measuring program performance in government

Jeffrey Bergin, Director, The Performance Institute

10:45 Break

11:00 PART: Program Purpose and Design/Strategic Planning

PART		
	Purpose: 20 percent	**Management: 20 percent**
	Planning: 10 percent	**Results: 50 percent**

- Ensure your program is starting off on the right foot by formulating a strong and defensible mission
- Develop a valid, cohesive strategic plan that will set practical long term goals while establishing a foundation for the future
- Establish efficient, transparent and cost-effective policies to ensure the success of your program

Jeffrey Bergin, Director, The Performance Institute

12:00 Lunch

The following sessions on the "Six-Step Framework for Successful R&D Programs" will be facilitated by *Dr. Gideon Samid, President, D&G Sciences*

1:00 Step 1: Starting a R&D Project

- Adopt a comprehensive and integrated approach for the development of a R&D project
- Identify critical success factors for developing a regimented procedure to transform innovation into organizational goals
- Examine the challenges and pitfalls in the implementation of your project's framework and how to overcome them

2:00 Step 2: Selecting a R&D Portfolio

- Practice several techniques for multi-variate evaluations
- Master selection criteria to ensure that successful projects will be funded
- Correlate successful outcomes to material contributions to the organizational goal

3:00 Break

3:15 Step 3: Funding Innovation

- Learn how to allocate and leverage the availability of R&D budget to best serve organizational goals
- Harness successful techniques to acquire complimentary investment through case studies and best practice scenarios
- Acquire the tools necessary to relate resource planning to scheduling and technical costing

4:15 Adjourn

se For Your R&D Investment!

Day Two: May 25, 2004

8:30 Continental Breakfast

9:00 Step 4: Managing Innovation Intensive Programs

- Adopt comprehensive and integrated management techniques that are unique to R&D projects
- Identify critical success factors in planning for unexpected outcomes
- Develop a strategy to overcome challenges and uncertainties in budget allocation for R&D projects

10:00 Step 5: Estimating Cost of Research

- Measure the amount of knowledge needed to realize the cost-to-complete and time-to-finish for your project
- Implement latest innovations like BiPSA methodology to increase validity of project cost estimates
- Review the mathematical basis and qualitative basis of this scientific estimation for R&D

11:00 Break

11:15 Step 6: Termination of a R&D Project

- Learn how to appraise the prospective success of R&D projects
- Determine the suitability of premature termination of a disappointing project
- Devise best practice techniques to free budget and talent for more successful projects

12:15 Adjourn General Session/ Lunch for Workshop Attendees

POST-SUMMIT WORKSHOP

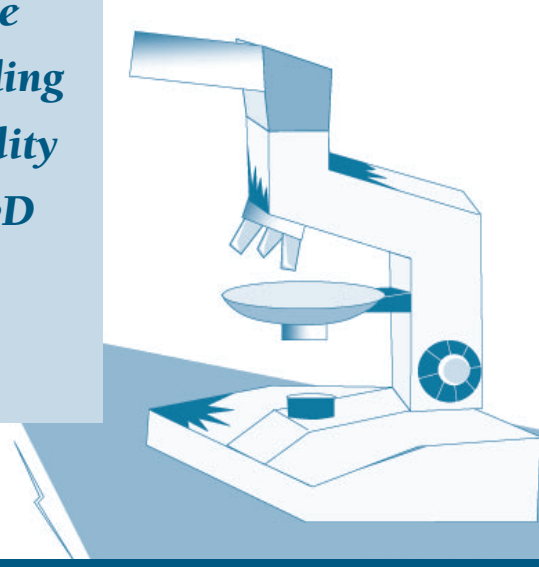
1:15 Hands-on Application of the R&D Methodology

Participants will be divided into working groups and be challenged to put into practice the material they have been learning in this seminar. Each group will face an R&D challenge, plan the start of a R&D program, pick a R&D portfolio, decide on R&D budget allocation for the selected R&D projects, then exercise management decisions in response to instructor's challenges. Finally, the teams will use BiPSA and the other tools to produce an estimate of cost-to-complete and time-to-finish of selected projects.
Dr. Gideon Samid, President, D&G Sciences

Note: Early registrants are encouraged to propose R&D situations close to their interest for this workshop.

4:15 Adjourn

Secure the Tools to Guarantee Future Funding and Credibility for Your R&D and S&T Program



Estimate Cost-to-Completion for Your R&D Project

5 Reasons to Attend this Forum

1 Develop Performance Measures and Strategies for R&D Investment Criteria

2 Establish Indicators and Evaluation Techniques for Estimating Cost and Schedule for Your R&D Programs

3 Manage the Bottom-Line Results of Your Innovation-Intensive Project

4 Design a Successful R&D Framework and Maximize Benefits of Existing Programs

5 Align Management Techniques to Innovation-Intensive Projects

WHO SHOULD ATTEND:

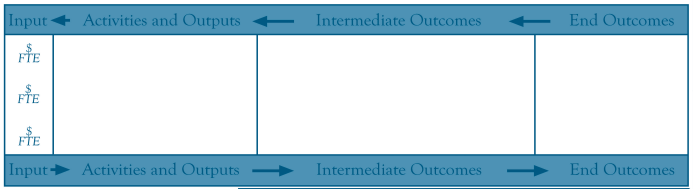
- R&D and S&T Program Managers
- Performance Management Staff
- Financial Managers
- Evaluation Directors
- Strategic Planning Staff
- Grants/Contract Managers
- Office of R&D/S&T
- Research and Engineers
- Budget Coordinators for R&D and S&T
- Program/Management Analysts for R&D and S&T
- Project Managers
- …And ALL Others Responsible for the Measurement and Management of Applied and Basic R&D Programs

Bring this R&D Project Management Training In-House

The Performance Institute offers customized one- and two-day education programs to federal, state and local agencies that wish to train staff members in their own facility on best-practices for funding R&D innovation. In-house training, even though not a certification course, provides a curriculum tailored specifically to your office, program or agency in a cost and time-efficient manner. Using the Logic Model, BiPSA and other cutting-edge tools and strategies, our experts will work with you to effectively design measure and manage performance in your very specific and challenging projects.

Not only will staff complete the training with a set of viable measures and defined metrics that can be implemented immediately, but with the tools to adapt and evolve and ultimately create new, highly useful measures on their own. For more information about the in-house training options available to you, please call James Lewis at *703-894-0481* or via email at *Lewis@PerformanceWeb.org*.

The Government Performance Logic Model™



Venue

The *National Summit on R&D Performance Management in Government* 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 just inside of the building.

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

Hotel

The Performance Institute is located just two blocks form the Quality Courthouse, where a limited number of rooms have been reserved at a discounted rate of $115 per night. Please call the hotel to make reservations and be sure to ask for the The Performance Institute conference rate.

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

Tuition Rates

Tuition rates for the *National Summit on R&D Performance Management in Government* is as follows:
Summit: $1095 Workshop: $495

Group Discount

For more information about available group tuition discounts, please contact James Lewis at *703-894-0481* or via email at *Lewis@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's change or topic settings may occur.



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

REGISTRATION FORM

National Summit on R&D Performance Management in Government

Call (703) 894-0481; Fax this form to: (703) 894-0482; or visit: www.PerformanceWeb.org

❑ Yes! Register me for the Summit only.
❑ Yes! Register me for the Summit and Workshop.
❑ Please call me. I am interested in a special group discount for my team.

Name _____ Title _____

City/County _____

Dept _____

Address _____

Address _____

City _____ State ___ Zip _____

Telephone _____ Fax _____

E-mail _____

METHOD OF PAYMENT:

❑ Credit Card ❑ Check ❑ Purchase Order/Training Form

Card Number _____

Exp. Date _____ Name on Card _____

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