How You Will Benefit

Enhance Agency Budget Justifications

Integrate budget requests to strategic plans

Improve OMB and Congressional Budgeting Policies

Streamline the productivity of your management processes in all levels of your agency

Calculate and Manage Full Program Costs

Align financial measurement systems with performance reports to achieve organizational objectives

"Move the Money" Reallocating Agency Resources

Realign assets to better strive toward overall mission

What You Will Learn

- OMB Guidance on Budget-Performance Integration
- Program Assessment Rating Tool
- Strengths and Weaknesses of Model Budget Justifications
- Ten-Step Process to Integrate Performance and Budget Information
- Understanding the Federal Budget Process
- Methods for Full-Cost Accounting in Government

2005 Best Practices Forum on:

Budget-Performance Integration

IN GOVERNMENT

Implementing Performance-Based Budgeting that Links Government Resources to Taxpayer Results

February 24-25, 2005 • Arlington, VA
The Performance Institute



Presented by:

The Performance Institute

Acquire a Proven Ten-Step Framework that Delivers Fully Compliant Results

www.PerformanceWeb.org

2005 Best Practices Forum on **Budget-P**

Dear Government Executive,

Propelled by increased accountability and financial benefits, performance-based budgeting is rapidly gaining appeal throughout the government. PBB is the integration and aligning of an agency's budget allocations with their performance through the use of predetermined performance measures. Program managers need to know and understand what they are truly trying to achieve—end outcomes—and then budget accordingly. Apply the methodology from this training to learn how to utilize performance measures to communicate to your program's stakeholders and appropriators how you are efficiently allocating funds to achieve RESULTS.

The best trained and most committed program leaders are reaping the biggest benefits through the proper utilization of performance-based budgeting. With the increasingly monetary importance of performance-based budgeting, don't miss the *2005 Best Practices Forum on: Budget-Performance Integration in Government* being hosted February 24-25, 2005 in Arlington, Va.

Integrate Your Strategic Plan and Your Budget

The release of the Program Assessment Rating Tool (PART) in 2002 established the clear commitment to performance and accountability for federal programs. By demanding measurable results, the PART integrates the core aims of budget-performance integration and performance plans. This training will focus on developing a performance-based strategic plan by applying the Strategic Management Framework methodology as a template for developing a results-oriented strategic plan for your programs.

The Government Performance and Results Act always envisioned the integration of the strategic plan with budget allocations. With PART we finally have the tool to assimilate the two into a cohesive unit and incentivize the use of performance-based budgeting. Congress is now taking GPRA to the next level by using performance measures to make their appropriations decisions. Acquiring the skills to integrate program goals with justification of budget estimates will aid in your program's ability to define and manage for results.

Increase Accountability and Efficiency

Measuring performance is good management because it clarifies what is important to the organization and provides direction for the future. Performance-based budgets give meaningful indications of how the dollars are expected to turn into results. As agencies are tasked with linking resources to results, it becomes increasingly important that the full cost of government services be calculated. Through increased use of performance measures, cost data, and management frameworks, agencies are able to make managerial decision based on the cost and impact of services provided. Apply the tools from this training to increase your program's PART scores to secure larger budgets and protect existing budgets.

Don't miss this opportunity to utilize the methodology and strategies provided to increase the performance and accountability of your programs and 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 February!

Sincerely,

Chris Braddock

Chris Braddock
Associate Director
The Performance Institute

Link Resources to Results through Performance-Based Budgeting

INSTRUCTORS:

Justine Rodriguez, Office of Economic Policy, Office of Management and Budget (invited)

Felipe Monroig, Director of External Affairs, The Performance Institute

PROGRAM AGENDA

Day One: February 24, 2005

8:30 **Registration and Continental Breakfast**

9:00 **Achieve Effective Performance Information in Government**
- Overview of PART expectations
- OMB review of performance plans
- Expectations for future implementation of PART

10:00 **Integrate PART to GPRA and PMA**
- Strengths and weaknesses of past performance mandates
- Role of GPRA and PMA in program management
- Integrate and communicate PART, GPRA and PMA
- Step-by-Step Application of PART

11:15 **PART Element One: Program Purpose and Design**
- Detail analysis of questions in section one
- Analyze clearly defined program purpose and mission
- Identify programs with duplicative program purpose

12:15 **Networking Luncheon**

1:15 **PART Element Two: Strategic Planning**
- Detail analysis of questions in section two
- Identify strategic planning strengths and deficiencies
- Analyze long-term and annual performance goals and measures

2:15 **PART Element Three: Program Management**
- Detail analysis of questions in section three
- Evaluate management of program goals as outlined in strategic plan
- Identify areas of management challenges in program stewardship

3:30 **PART Element Four: Program Results**
- Detail analysis of questions in section four
- Evaluate program success toward long-term goals and measures
- Identify program success in meeting annual performance goals and measures

4:30 **Adjourn**

Day Two: February 25, 2005

8:30 **Continental Breakfast**

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

erformance Integration in Government

1:00 Calculate and Correlate Program Costs by Using Performance Framework
- Develop long-term and annual performance goals and measures that monitor program success
- Develop performance-based functions that break down silos and communicate success throughout the program
- Integrate goals, measures, outputs and activities into a performance framework to illustrate success

2:00 APPLICATION SESSION: Develop Your Own PART
- Complete PART questionnaire for your program
- Create a business case for your budget request
- Apply performance management framework to PART

4:00 Adjourn

METHODOLOGY COVERED

This training will focus on developing performance goals and measures by applying the Government Management Logic Model Framework as a template for developing accurate and succinct performance goals and measures for government programs. This framework will aid government managers in the stewardship of the annual and long-term objectives of the individual program and the organization, and is in compliance with GPRA performance criteria as well as OMB PART guidance.

Building a Performance-Based Budget

Ten Steps Using the Logic Model

Input	Activities	Outputs	Intermediate Outcome Strategies	End Outcomes
$ FTE				

Budget-Performance "Integration"

Cost-Per-Unit (Activity/Output)

Step 1: Develop/Align to Strategic Plan (Mission, Outcomes, Strategies)
Step 2: Determine Outputs (By Program)
Step 3: Define Activities to Deliver Outputs
Step 4: Calculate Existing Full Costs (Direct/Indirect for Each Activity)
Step 5: Correlate New Output Costs to Intermediate Outcome Achievements
Step 6: Achieve Cost Efficiencies through Restructuring
Step 7: Set Targets (Revise after Budget Finalization)
Step 8: Budget Account Restructuring/Alignment
Step 9: Budget Justification
Step 10: Budget Execution

Hands-On Training on OMB's Program Assessment Rating Tool

RECEIVE CERTIFICATION & IN-HOUSE TRAINING



This event is part of the Government Performance Management Certification Program. In addition, the Performance Institute offers customized education programs to federal and state agencies that wish to train staff members in their own facility on change management. For more information about the certification and in-house training options available to you, please contact Blake Zach at 703-894-0481 or email him at Zach@PerformanceWeb.org.

Venue and Hotel:

2005 Best Practices Forum on Budget-Performance Integration in Government 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

A limited number of rooms have been reserved at a discounted rate of $115 at the Quality Courthouse Hotel, located two blocks from the Performance Institute. Please mention Performance Institute to guarantee this rate and ask to be put in the main tower, which has been recently renovated. In addition, a limited number of discounted rooms are also available at the Hilton Crystal City at National Airport at a rate of $159, or if available, the prevailing government per diem rate. A complimentary shuttle is available both before and after the conference. Please call the hotel directly to make reservations and be sure to ask for the Performance Institute conference rate.

Quality Courthouse
1200 N. Courthouse Road
Arlington, VA 22201
Phone: 703-524-4000

Hilton Crystal City at National Airport
2399 Jefferson Davis Hwy
Arlington, VA 22202
Phone: 703-418-6800

Tuition and Group Discounts:

The fee for attending *2005 Best Practices Forum on Budget-Performance Integration in Government* is $1095.
Reduced tuition rates for delegates who attend in groups of three or more are also available by calling Blake Zach at 703-894-0481 or emailing him at Zach@PerformanceWeb.org. Be sure to use program code P435 when you register.

Cancellations and Quality Assurance:

The Performance Institute strives to provide you with the most productive and effective educational experience possible. If after completing the course you feel there is some way we can improve, please write your comments on the evaluation form provided upon your arrival. Should you feel dissatisfied with your learning experience and wish to request a credit or refund, please submit it in writing no later than 10 business days after the end of the training to: Chris DeMaio, Chief Operating Officer, The Performance Institute, 1515 N. Courthouse Road, Suite 600, Arlington, VA 22201 (phone: 703-894-0481). We will evaluate individual complaints in a context of collective comments from the event. **Note:** A $150 service fee will be charged on cancellations received less than three weeks from the date of the event. A credit memo will also be sent reflective of that amount, which can be used for a future Performance Institute conference.

CPE Credit:

Delivery Method: Group-live **Program Level:** Advanced
Prerequisites None **Advanced Preparation:** None
CPE Credits: 12.5

The Performance Institute is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Nashville, TN 37219-2417. Website: www.nasba.org

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Registration Form for the *2005 Best Practices Forum on Budget-Performance Integration in Government*

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

☐ Yes! Register me for the forum.

☐ Please call me. I am interested in a special group discount for my team.

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