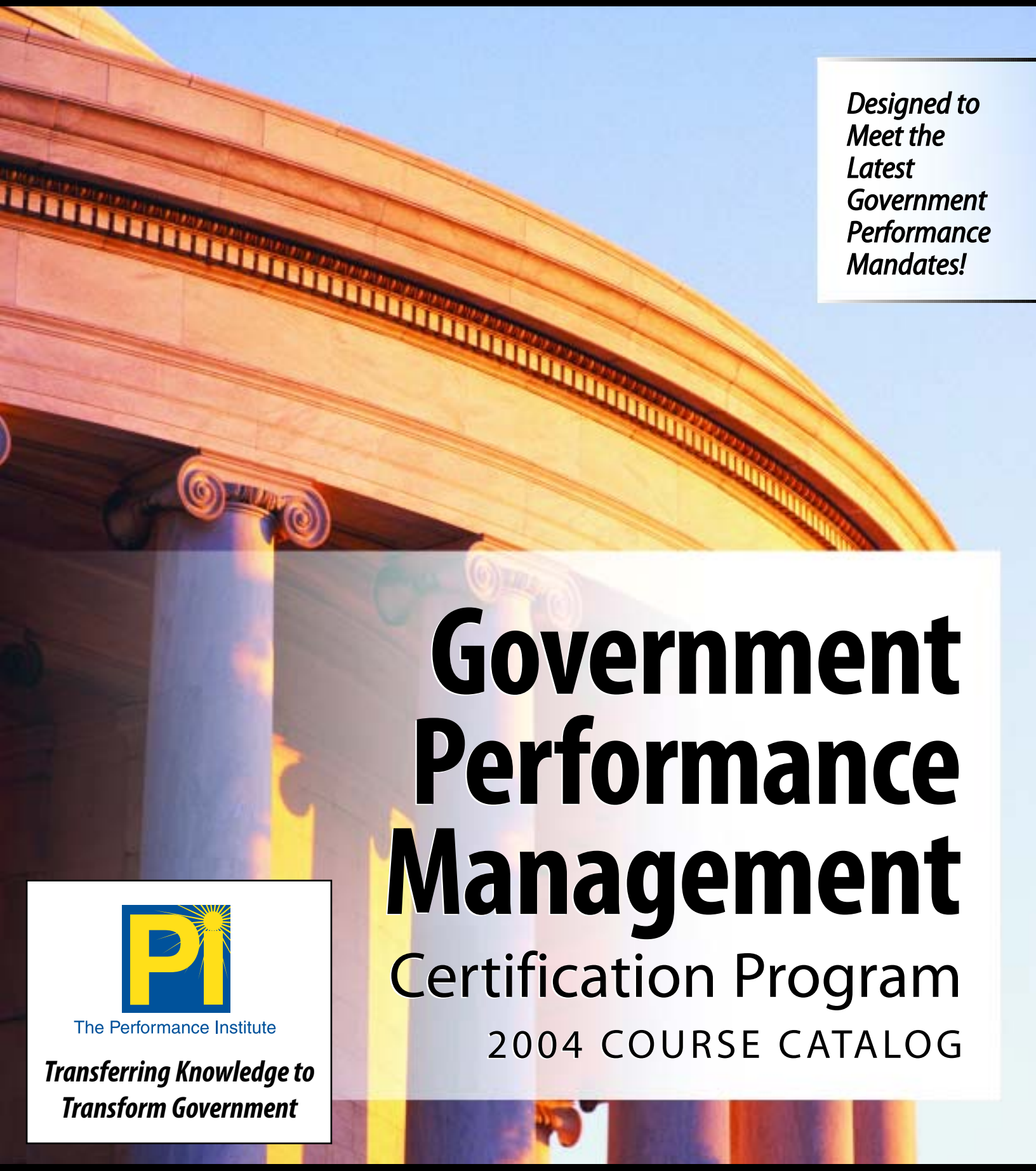
Plan, Manage, Measure, and Budget... for Results!



Designed to Meet the Latest Government Performance Mandates!

Government Performance Management

Certification Program

2004 COURSE CATALOG

The Performance Institute

Transferring Knowledge to Transform Government

The ONLY Comprehensive Program that Develops "Performance Managers" in Government

Become a Performance Manager...

The Performance Institute

Dear Government Executive:

Meet New Mandates for Performance and Accountability in Government

Program performance measures, strategic plans, IT capital plans, performance-based contracts, competitive sourcing studies, employee performance evaluations…the list goes on and on! Government agencies at all levels are increasingly under pressure to measure the performance of their programs and report the results to policy-makers and the general public. From the President's Management Agenda and the Government Performance and Results Act at the federal level to specific performance accountability statutes and initiatives at the state and local levels, government performance mandates are on the rise.

To help government agencies achieve successful implementation of performance-based management reforms, the Performance Institute provides comprehensive education programs through its *Government Performance Management Certification Program*. All courses in this nationally-recognized program are specifically designed to ensure full compliance and successful implementation of ALL performance management reforms in government.

Build Performance Management Competencies in Your Agency

As the nation's largest think tank dedicated exclusively to government performance management, the Performance Institute offers agencies proven and powerful solutions for improving government programs. And now, those innovations, techniques and methodologies can be brought in-house to each agency through the *Government Performance Management Certification Program*.

Agency managers emerge from each course with a full understanding of statutes and standards for government management-as well as tools and techniques for achieving full compliance. In addition to the training received during the courses, participants in the certification program are asked to select a "demonstration project" within their agency to apply the concepts learned during the program. Finally, to keep participants up to date on the latest changes in management issues, the Institute provides recipients a monthly e-newsletter containing updates on federal, state and local management reform initiatives.

Learn from the Leaders in Government Performance Reform

Each course in the *Government Performance Management Certification Program* is taught by seasoned experts in government management and features case studies from leading government agencies as well as current and former legislative and executive branch officials.

Advance Your Career as a "Performance Manager"

A solid foundation in government performance management is crucial to survive and thrive in today's government workplace. By attending one or more of the courses offered in this series, you will hone your skills in designing, implementing and evaluating management improvement initiatives. You will also learn to break down management silos to ensure success and accountability of your projects.

The publicly offered courses are designed to provide interactive training, so space will be limited. Agencies can send staff to attend the public-offered courses in this catalogue, or bring a customized program in-house for their managers. To register yourself and your team, or to inquire about customized in-house programs, call us today at 703-894-0481 or visit us online at www.performanceweb.org.

Sincerely,

Carl DeMaio

Carl DeMaio
President

Stay on Top of New Performance Mandates through Staff Certification

Government Performance Management Certification Program™

Whether you select one course, a series of courses, or complete the entire program, acquire the skills to manage for results with the only certificate program in government performance!

Comprehensive Coverage of the Latest Management Mandates and Challenges…

- *Open-Enrollment Training Courses*
- *Customized In-House Training Programs*
- *Agency "Demonstration Projects"*

…Guaranteed to Drive Change and Transformation in Your Agency



Course Offerings in Government Performance Management

	MANAGERIAL AREAS						
	Program Management	Budgeting	Planning and Evaluation	Financial Management	Contracting and Outsourcing	Information Technology	Human Resources Management
CORE COURSES (TAKE ALL THREE)							
STRATEGIC PLANNING	X	X	X	X	X	X	X
DEVELOPING AND USING PERFORMANCE MEASURES	X	X	X	X	X	X	X
PERFORMANCE-BASED BUDGETING	X	X	X	X	X	X	X
ELECTIVE COURSES (TAKE ANY THREE)							
PROJECT MANAGEMENT FOR GOVERNMENT	X	X	X	X	X	X	X
EMPLOYEE PERFORMANCE EVALUATIONS	X		X				X
LEADERSHIP AND CHANGE MANAGEMENT	X	X	X	X	X	X	X
PROGRAM EVALUATION AND ANALYSIS	X	X	X				
ACTIVITY-BASED COSTING/MANAGERIAL COST ACCOUNTING	X	X	X	X	X	X	
BUILDING BETTER IT BUSINESS CASES		X	X			X	
COMPETITIVE SOURCING		X	X	X	X		X
PERFORMANCE-BASED CONTRACTING	X				X	X	
AUDITING AND IMPROVING PERFORMANCE INFORMATION SYSTEMS	X	X	X	X		X	
INFORMATION TECHNOLOGY CAPITAL PLANNING		X	X			X	
EMPLOYEE PERFORMANCE DEVELOPMENT	X						X
BALANCED SCORECARD MANAGEMENT	X	X	X				X
PERFORMANCE-BASED GRANTS MANAGEMENT	X		X	X	X		
CUSTOMER SERVICE MEASURES AND STRATEGIES	X		X				X
STRATEGIC HUMAN CAPITAL PLANNING			X				X

Meet the Latest Government Performance Mandates

The Government Performance Management Certification Program provides a complete solution to all major management improvement challenges facing government.

PRESIDENT'S MANAGEMENT AGENDA (PMA)

By far the most pressing of the management initiatives, the President's Management Agenda defines five major performance management reforms for federal agencies to implement, complete with accountability report cards and standards for success.

- Budget-Performance Integration
- Competitive Sourcing
- Improved Financial Management
- Expanded e-Government
- Strategic Management of Human Capital

PROGRAM ASSESSMENT RATING TOOL (PART)

The Office of Management and Budget has created an evaluation tool that can be used to assess the performance of individual programs during the federal budget process. PART assessments require a substantial performance case for each federal program-covering program relevance, planning, performance measurement, management, and results.

GOVERNMENT PERFORMANCE AND RESULTS ACT (GPRA)

This statute requires every federal agency to develop a long-term Strategic Plan and an annual Performance Plan to guide management and budgeting of federal programs. GPRA also requires the development and inclusion of outcome-oriented performance measures for agency budget requests.

IT BUSINESS CASES/PERFORMANCE MEASURES

From the Clinger-Cohen Act to Exhibit 300 budget justifications under OMB Circular A-11, government IT managers must develop capital plans and performance measures to guide and evaluate agency IT budgets.

FINANCIAL MANAGEMENT AND INTEGRITY

From the Chief Financial Officers Act to Government Waste Corrections Act, government agencies are asked to implement timely and audited financial management systems that produce full cost accounting for program activities, while reducing payment errors and enhancing integrity.



HUMAN CAPITAL PLANNING/WORKFORCE ASSESSMENTS

Government agencies are now required to conduct comprehensive workforce assessments and develop human capital plans to enhance recruitment, retention, deployment, training and development of a quality workforce.

EMPLOYEE PERFORMANCE MANAGEMENT

Individual employee performance plans and evaluations are now being implemented across government to drive performance concepts throughout all levels of the organization. In some cases, agencies are exploring new pay structures, bonuses and performance-based pay systems.

COMPETITIVE SOURCING/OMB CIRCULAR A-76

This OMB Circular allows federal agencies to achieve cost efficiencies in commercial program activities through public-private competitions and outsourcing. The revised A-76 process puts a premium on cost and performance evaluations in the competitive sourcing process.

CONTRACTING AND ACQUISITION

The recently-passed Service Acquisition Reform Act (SARA) is but one of a number of federal statutes that require expanded use of performance-based contracts and other performance-based procurement methods.

STATE AND LOCAL GOVERNMENT

Forty-six out of 50 states have a formal strategic planning and performance measurement statute on their books... and virtually all states and localities are implementing the performance-based reforms outlined above.

Comprehensive Coverage...

Guaranteed to Achieve Compliance...

and Designed to Improve Government Program Performance!

Benefits of Performance Management Certification

Graduates of the certification program emerge with a command of the statutes, standards and best practices in each management issue area-poised to achieve their personal and organizational goals.



Benefits to Government Agencies

1. MEET GOVERNMENT MANAGEMENT MANDATES

Ensure full compliance with the myriad statutes, regulations and standards covering management in government.

2. DEFINE AND IMPROVE PROGRAM RESULTS

Define outcome-oriented plans and performance measures to focus program activities and expenditures on results.

3. ACHIEVE COST EFFICIENCIES IN PROGRAM MANAGEMENT

Use the latest management reforms to streamline and enhance internal agency processes to achieve cost efficiencies while improving service levels.

4. IMPROVE MANAGEMENT CAPACITIES INTERNALLY

Ensure your agency and its programs have access to *qualified* "Performance Managers" who can assist with the planning, measurement, management, and budgeting of program activities.

5. INTEGRATE MANAGEMENT INITIATIVES

Expose agency staff to a broad-based curriculum in management improvement that allows for coordination and synergy across all agency management functions.



Benefits to Government Managers

1. ADVANCE YOUR CAREER AS A "PERFORMANCE MANAGER"

Acquire the skills and tools that will make you the lead performance management resource for your agency.

2. APPLY CONCEPTS IMMEDIATELY TO YOUR WORK

Select a project to work on throughout the certification program, applying concepts and receiving expert feedback as you meet internal project deadlines.

3. IMPROVE INDIVIDUAL AND TEAM PERFORMANCE

Enhance your ability to define and improve individual and team performance using the latest management and leadership skills.

4. CRAFT A CUSTOMIZED AND FLEXIBLE PROGRAM

Design a learning program that fits your unique needs-select from courses offered in a variety of management topic areas and held throughout the year.

5. RECEIVE CERTIFICATION AND ACADEMIC CREDIT

Gain recognition as a "Performance Manager" through receipt of a formal certification through The Performance Institute , which will actively support your application for academic credit through the institution of your choice.



Plan, Manage, Measure, and Budget... for Results!

How the Program Works

The Government Performance Management Certification Program allows candidates to customize their learning and extend it beyond the classroom.

STEP 1: ENROLL IN THE PROGRAM

Contact the Performance Institute to enroll in one or more classes (see Registration Page). Please indicate if you intend to pursue full certification.

STEP 2: TAILOR PROGRAM TO YOUR DESIRED JOB FUNCTION

Review the course catalogue to construct your customized training program. Contact the Performance Institute with questions or to seek advice from our curriculum managers.

STEP 3: COMPLETE THE CORE COURSES

Schedule and attend the core courses. While it is ideal to take the core courses first, you can attend courses based on your schedule.

STEP 4: COMPLETE THE ELECTIVE COURSES

Schedule and attend the elective courses in your customized program.

STEP 5: COMPLETE A "DEMONSTRATION PROJECT"

For full certification, you must select a "demonstration project" that both applies the skills learned from the courses, and benefits your agency. Participants have the freedom to select any project of their choosing, but have to submit a tangible product that demonstrates their mastery of performance concepts. Submissions are reviewed by expert faculty members from the Institute-with feedback on projects given to each participant.

STEP 6: RECEIVE YOUR CERTIFICATION

STEP 7: KEEP UP-TO-DATE ON MANDATES AND INNOVATIONS

The training process doesn't end with certification. Stay up-to-date on performance mandates and the latest innovations with one of the Performance Institute's free research e-newsletters: *Update on the President's Management Agenda*, *State Management Innovations*, and *City and County Management Innovations*.

TWO SAMPLE PROGRAMS

Participant 1: Budget Analyst



Elective Courses Completed:
- Activity-Based Costing/Managerial Cost Accounting
- Program Evaluation and Analysis
- IT Performance Measurement and Budget Justification

Demonstration Project:
Completed a Program Assessment Rating Tool

Participant 2: Contract Manager



Elective Courses Completed:
- Performance-Based Contracting
- Project Management
- Competitive Sourcing

Demonstration Project:
Drafted and finalized a performance-based Statement of Work for an agency acquisition.

CORE COURSES
- Strategic Planning
- Performance Measurement
- Performance Budgeting

ELECTIVES
(Select Any Three Based on Your Career Need)
- Course 1
- Course 2
- Course 3

DEMONSTRATION PROJECT
(Selected by You, Reviewed by an Expert)

CERTIFICATION COMPLETE

KEEP UPDATED

The Performance Management Certification Program contributes to fulfilling the Executive Core Qualifications issued by the Office of Personnel Management:

Leading Change
Leading People
Driving Results
Acquiring Business Acumen
Building Coalitions/Communications

In-House and Customized Programs

Create a customized performance management training program to meet your agency's specific goals and jump start major management initiatives within your programs.

Many government agencies have chosen to bring portions of the Government Performance Management Certification Program in house to help drive implementation of specific agency management initiatives.

✔ TAILOR TO YOUR UNIQUE NEEDS

The Performance Institute will customize training courses to fit your agency's specific needs. Single courses can be offered, or an entire package of specialized courses.

✔ DRAW FROM YOUR OWN PROGRAM CHALLENGES

Instructors will examine agency programs for specific examples to use during each training course. Interactive exercises can employ an actual project or scenario from within the agency.

✔ INTEGRATE WITH OTHER INITIATIVES

Training can be the perfect complement to other initiatives being managed by the agency. By aligning training with management policies, change management is bolstered.

✔ IMPROVE THE IMPACT OF TRAINING

By customizing your training and aligning the curriculum of each session to the specific needs of the agency, the learning outcomes are dramatically enhanced.

✔ MAXIMIZE YOUR TRAINING DOLLARS

In-house training is far more economical than per-person training courses. Moreover, by bringing training to your location, travel expenses are virtually eliminated.



EXAMPLE ONE

AGENCY FACING BUDGET CHALLENGES

Performance Budgeting
Activity-Based Costing/Managerial Cost Accounting
Performance Measurement
Strategic Human Capital Planning
Competitive Sourcing
Performance-based Contracting

EXAMPLE TWO

AGENCY LAUNCHING QUALITY INITIATIVE

Customer Service Measures and Strategies
Performance Measurement
Project Management
Activity-Based Costing/Managerial Cost Accounting
Employee Performance Evaluations
Leadership and Change Management

EXAMPLE THREE

AGENCY IN MAJOR RESTRUCTURING

Leadership and Change Management
Strategic Planning
Strategic Human Capital Planning
Performance Measurement
Auditing and Improving Performance Information Systems
Employee Performance Development

EXAMPLE FOUR

AGENCY WITH WORKFORCE CHALLENGES

Strategic Human Capital Planning
Employee Performance Development
Employee Performance Evaluations
Leadership and Change Management
Competitive Sourcing (if applicable)

EXAMPLE FIVE

AGENCY WITH TECHNOLOGY CHALLENGES

IT Capital Planning
IT Performance Measurement and Budget Justification
Project Management
Customer Service Measures and Strategies
Performance-Based Contracting

Call Blake Zach at The Performance Institute today at 703-894-0481 to discuss your customized in-house training program.

Strategic Planning

Federal, state and local government agencies are increasingly under pressure to develop long-range strategic plans that chart out agency goals on a multi-year basis. From the Government Performance and Results Act to state and local mandates, agencies are asked to use strategic planning at all levels of the organization to develop goals, refine policies, and manage initiatives. Strategic planning in a governmental context requires a modified approach to traditional strategic planning that mixes statutory requirements with the evolving dynamics of public policy issues faced by government agencies. Acquiring strategic planning skills will aid in your program's ability to define results, manage for results, and communicate with program stakeholders.

KEY METHODOLOGIES COVERED

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 government programs. This framework is derived from best practices at all levels of government and is compliant with the GPRA strategic planning criteria and OMB guidance.



MEETS CORE COMPETENCIES FOR

Directors of Strategic Planning, Program Managers, Program Analysts, Budget Officers, Performance Analysts

HOW YOU WILL BENEFIT

- Align your strategic plan to performance to better meet guidelines established in the PMA and PART
- 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

DATES AND LOCATIONS

April 1-2, 2004 in Arlington, Virginia (Code: P218)
July 8-9, 2004 in Arlington, Virginia (Code: P219)
October 14-15, 2004 in Arlington, Virginia (Code: P221)

COURSE LEVEL: Intermediate
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095

TRAINING CURRICULUM

Day One Agenda

9:00 **Strategic Planning Mandates and Trends**
- Government Performance and Results Act (GPRA)
- President's Management Agenda (PMA)
- Strategic planning lessons from the federal, state and local levels

10:00 **Strategic Planning Framework**
- Instruction on a strategic management framework
- Instruction on Logic Model methodology
- Designing a strategic planning process to solicit internal and external feedback

1:00 **Defining Mission and Outcome Goals**
- Developing an effective, statute-based mission statement
- Including a vision statement with organizational values and principles
- Establishing outcome goals to drive mission-aligned organizational results

3:00 **Strategic Issue Analysis**
- Conduct a comprehensive landscape assessment that analyzes issues faced by a government program
- Lead a SWOT analysis and center-of-gravity analysis
- Examine issue research, program evaluations, policy studies and stakeholder input

4:00 **Adjourn**

Day Two Agenda

9:00 **Defining Strategies for Achieving Results**
- Examine the costs and benefits of strategic alternatives
- Define intermediate outcome impacts on attitudes, behaviors and conditions
- Justify program strategies with policy analysis and organizational assessments

10:30 **Aligning Program Outputs and Activities to Strategic Plan**
- Cascade outcome goals and strategies to the program level
- Define activities to achieve desired results

1:00 **CASE STUDY: Strategic Planning Best Practice**
- Examine the strategic planning process and results from an agency example

2:00 **APPLICATION SESSION: Scenario and Planning Exercise**
- Analyze an issue scenario by applying the SWOT and center-of-gravity assessment models
- Define mission, outcome goals, strategies, outputs and activities
- Decide roll-out of strategic plan to achieve organizational change

4:00 **Adjourn**



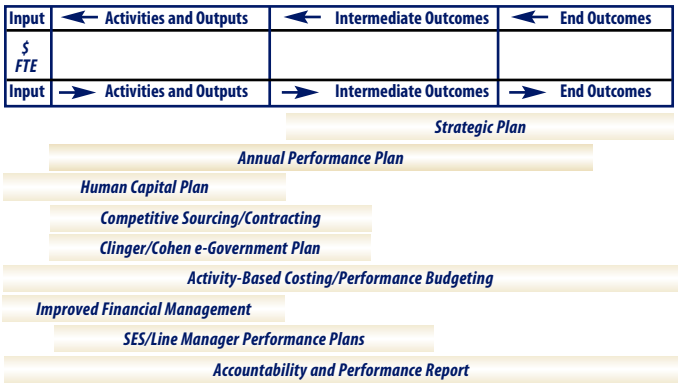
Developing and Using Performance Measures

As we move closer and closer to a performance-based government, agencies are focusing on establishing measures and performance plans for the myriad programs under their supervision. The increased focus on performance moves hand-in-hand with an important increase in government transparency. One hurdle in this process has been the creation of efficient measures that track and communicate program success and accountability. Through the creation of results-oriented measures, managers can track program success by adhering to a set of measures to drive the outcomes, strategies and outputs of their program.

KEY METHODOLOGIES COVERED

This training will focus on developing performance goals and measures by applying the Government Performance Logic Model framework as a template for program management. Through the establishment of outcome-oriented performance measures, program managers will be able to communicate and monitor the success of annual and long-term performance goals.

The Government Performance Logic Model



MEETS CORE COMPETENCIES FOR

Performance Measurement Staff, GPRA Personnel, Budget Officers, Strategic Plan Directors, Performance and Evaluation Analysis Director

HOW YOU WILL BENEFIT

- Craft effective performance measures for your mission and cross-cutting functions
- Balance performance measures across all five PMA initiatives
- Implement the Logic Model Framework to manage performance
- Integrate new measures into strategic plan and budget requests for your program

DATES AND LOCATIONS

April 15-16, 2004 in Arlington, Virginia (Code: P213)
July 19-20, 2004 in Arlington, Virginia (Code: P191)
October 6-7, 2004 in Arlington, Virginia (Code: P222)

COURSE LEVEL: Intermediate
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095

TRAINING CURRICULUM

Day One Agenda

9:00 **Performance Measures for Program Success and Efficiency**
- OMB criteria for effective outcome performance measures
- Align output performance measures to program outcome measures
- Use performance measures to monitor and communicate programmatic success

10:00 **Implementing the Government Performance Logic Model to Develop and Manage Common Performance Measures**
- Establish clearly defined end and intermediate outcomes
- Develop measures to communicate internal and external priorities
- Promote good management by monitoring program performance

1:00 **SHOW ME THE MEASURES: "Best-in-Class" Outcome Performance Measures using the Logic Model**
- Use the Logic Model and discuss best practice outcome measures
- Discuss end outcomes for specific missions
- Illustrate the links among outcomes, strategies, outputs and inputs

2:30 **Application Session: Developing Outcome Performance Measures**
- Develop outcome performance measures utilizing Logic Model methodology
- Create clearly defined succinct measures that are the best integrated to the outcome goals established by your program.
- Communicate measures to ensure they cover the program's full life cycle

3:30 **Developing "Intermediate Outcome" Performance Measures Linked to Program Strategy**
- Assess changes in your organization in order to revise intermediate outcome goals
- Integrate strategies with outcomes to eliminate barriers to improving program performance
- Utilize application assignment to examine particular strategies and objectives for your program

4:30 **Adjourn**

Day Two Agenda

9:00 **Applying Performance Measures to Intermediate and End Outcomes**
- Manage program goals through the application of performance measures for results and strategies
- Assess the success of your goals and strategies by examining the role your measures play in achieving desired results
- Communicate the effectiveness of model measures for your goals and strategies to ensure repeated success

11:00 **SHOW ME THE MEASURES: Model Performance Measures for Business Processes and Cost-Efficiencies**
- Examine the efficiency and effectiveness of your organization's business processes
- Develop ideal measures for your organization that can be managed and applied.
- Utilize ratio analysis to study measures to ensure they are providing you with a sound return on investment.

1:00 **SHOW ME THE MEASURES: Model Performance Measures for Customer Service**
- Streamline your customer service measures
- Ensure all your measures are useful
- Implement methodology

4:30 **Adjourn**

Performance-Based Budgeting Forum and Simulation

The bar has been raised for federal programs to tie their goals with the resources they have been allocated. The initiative of Budget-Performance Integration calls for federal programs to create outcome oriented goals and measures, and align their allocated resources with those goals. 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. By demanding measurable results, goals and accountability for resource allocation, the PART integrates the core aims of budget-performance integration and performance plans. 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, and communicate with program stakeholders and appropriators.

KEY METHODOLOGIES 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
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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

MEETS CORE COMPETENCIES FOR

Budget Analysts, Program Managers, Budget Officers, Budget and Performance Chiefs, Legislative Officers, Fiscal Affairs Managers

HOW YOU WILL BENEFIT

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

DATES AND LOCATIONS

May 3-4, 2004 in Arlington, Virginia (Code: P194)
August 16-17, 2004 in Arlington, Virginia (Code: P223)
November 3-4, 2004 in Arlington, Virginia (Code: P224)

COURSE LEVEL: Advanced
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095

TRAINING CURRICULUM

Day One Agenda

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

10:00 Integrating 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
- Detailed analysis of questions in section one
- Analyze clearly defined program purpose and mission
- Identify programs with duplicative program purpose

1:15 PART Element Two: Strategic Planning
- Detailed 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
- Detailed 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
- Detailed 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 Agenda

9:00 Creating 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

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

Employee Performance Evaluations

Your employees' success is often 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 resource manager, it is of the utmost importance to recognize employee potential and transform those employees into the leaders of tomorrow. As a manger you must provide quality service to internal customers (employees), before you can expect quality service to be delivered to external customers. Learn techniques that will make preparing performance evaluations fast and easy, and will result in an evaluation that is a true reflection of the employee's job performance.

KEY METHODOLOGIES COVERED

This training will focus on developing employee performance evaluations that are in alignment with the Office of Personnel Management's Civil Service Regulations. It will look at best practices from all levels of government focusing on the Department of Defense and the Department of Homeland Security.

Four Quadrants for Balancing Employee Evaluations

Internal Efficiencies	Workplace Excellence
Program Results	Customer Service

MEETS CORE COMPETENCIES FOR

Human Resource Directors, Employee Development Directors, Employee Development Specialists, Training Managers, Staffing Directors

HOW YOU WILL BENEFIT

- 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

DATES AND LOCATIONS

July 26-27, 2004 in Arlington, Virginia (Code: P225)
September 15-16, 2004 in Arlington, Virginia (Code: P226)

COURSE LEVEL: Intermediate
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095

TRAINING CURRICULUM

Day One Agenda

9:00 Employee Performance Evaluation Mandates and Trends
- Overview of OPM regulations on conducting employee performance evaluations
- Update on legislation and administration initiatives on performance evaluations
- Briefing on rules and regulations for assessing and correcting employee performance deficiencies

10:00 Employee Performance Evaluation Framework
- Performance evaluation best practices and lessons from federal, state and local levels
- Introduction on Logic Model methodology
- Strategies for aligning individual employees to program performance

1:00 Establishing Effective Employee Evaluations Policies and Procedures
- Create a working group and internal capacity for employee performance plans
- Develop polices and procedures for an executive resource board

3:00 Creating Goals and Measures for Individual Employees
- Develop your employees measures of success: common and individual performance standards
- Facilitate manager and employee involvement in determining goals and measures for employee performance plans

4:00 Adjourn

Day Two Agenda

9:00 Aligning Employee Evaluations to Management Initiatives
- Link employee performance goals to professional development
- Manage and correct employee performance to deliver desired performance

10:00 Implementing Employee Performance Plans
- Develop strategies for effectively administering training and development programs
- Align training initiatives with goals set forth in your strategic plan

1:00 Rating Employees, Recognizing Achievement and Providing Feedback
- Establish rules, regulations and processes for employee evaluation and feedback
- Facilitate manager/employee participation and dialogue
- Develop a methodology for individual employee performance evaluations

3:00 Addressing Poor Performance
- Assist employee and supervisor in identifying future performance goals and objectives
- Communicate expectations and correct performance problems
- Collect and analyze performance information

4:00 Adjourn



Performance-Based Contracting

Government is now more results-oriented, particularly in the way which government contracts are written. One of the most important challenges facing agencies is the need for widespread adoption of performance-based service acquisition, but many acquisition personnel lack the necessary skills to develop and implement performance-based contracts (PBC). The seven-step process for developing performance-based contracts simplifies the process and outlines the most efficient way to achieve goals defined in the President's Management Agenda. The process also provides new insight on defining goals and improving transparency and accountability in government contracting that will produce results.

KEY METHODOLOGIES COVERED

The performance-based contracting training is based on writing a contract that focuses on performance goals using the cutting-edge seven-step framework which serves as a template for agency contracts. The Government Performance Logic Model is applied to define contract goals that will simplify the drafting of your Statement of Work (SOW), Statement of Objective (SOO) and Performance Work Statement (PWS).

Building a Performance-Based Contract
Seven Steps Using the Logic Model

Input	← Activities	← Outputs	← Intermediate Outcome Strategies	← End Outcomes
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Primary Measures for SOO

Primary Measures for SOW

Step 1: Establish the Contracting Team
Step 2: Identify the Scope and Anticipated End Outcomes
Step 3: Examine Private-Sector and Public-Sector Solutions
Step 4: Select Performance Measures (Intermediate Outcomes, Outputs and Work Processes)
Step 5: Develop a PWS or SOO
Step 6: Select Contractor
Step 7: Monitor and Manage Performance

MEETS CORE COMPETENCIES FOR

Chief Acquisition Officers, Senior Procurement Executives, Federal Contract Administrators, State Contract Administrators, Local Contract Administrators, Procurement Officials, Acquisition Managers

HOW YOU WILL BENEFIT

- Fulfill the new performance mandates of the Services Acquisition Reform Act (SARA)
- Harness the Seven-Step Framework to manage contracts more effectively and efficiently
- Implement a contract-management system that utilizes performance-based incentives

DATES AND LOCATIONS

April 21-22, 2004 in Arlington, Virginia (Code: C136)
July 14-15, 2004 in Arlington, Virginia (Code: C137)
November 17-18, 2004 in Arlington, Virginia (Code: C138)

COURSE LEVEL: Intermediate
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095

TRAINING CURRICULUM

Day One Agenda

9:00 Step 1: Establish the Team
- Benchmark the contract's purpose, objective and outcome
- Clearly identify and define the roles and responsibilities of all participants, including vendors
- Link the program's mission and its individual team members with the stated objectives

9:30 Step 2: Decide what Problem Needs Solving
- Learn to effectively assess current levels of performance
- Determine the key components of a successful contract
- Link acquisitions to mission and performance objectives

10:30 Step 3: Examine Private-Sector and Public-Sector Solutions
- Conduct efficient and productive market-sector research
- Improve contract development by effectively utilizing private-Sector Input before writing PWS's and crafting SOO's
- Apply experience from public-sector counterparts

11:15 Step 4: Develop a Performance Work Statement (PWS) or Statement of Objective (SOO)
- Learn the key components of a PWS and an SOO
- Compare the strengths and weaknesses of both methods
- Gain essential insight regarding when to use a PWS versus a SOO

1:15 Step 5: Decide How to Measure and Manage Performance
- Learn to identify key performance measures useful to contracts
- Establish clear "end-outcome" and "intermediate-outcome" goals
- Craft and utilize statements of Work and Objective

2:45 Step 6: Select the Right Contractor
- Learn to interpret past performance to predict future results
- Determine the "best value" from a diversity of proposed services
- Assess and resolve potential conflicts of interest

3:30 Step 7: Manage Performance
- Learn to establish a clear line of performance accountability
- Engage the contractor with the team to improve results
- Continue measurement during the contract to improve results

4:30 Adjourn

Day Two Agenda

9:00 Update on Performance-Based Contracting Best Practices and Administration Mandates
- Hear the latest expectations of the Administration
- Learn the expectations of a modern performance-based contract

10:00 Performance-Based Contracting Examples: Getting Beyond Theory
- Align contracts with your agency core goals and mission
- Maximize the relationship between contractor and agency
- Identify key factors in performance-based contracting

11:30 Performance-Based Contracting Incentives: Milestones, Bonuses, and Rewards for Improved Performance
- Learn to use a variety of incentives to reward performance
- Determine when to use financial bonuses and where/how to set the bar
- Examine innovative vehicles for incentives

1:15 CASE STUDY: Performance-Based Contracting Best Practice
- Examine PBC methods for developing and implementing from a Federal Agency example

2:15 APPLICATION SESSION: Drafting Performance Work Statements
- Experience a hands-on exercise focusing on the most difficult part of Performance-Based Contracting
- Apply PBC concepts to agency example
- Implement methods for writing an effective PWS

4:30 Adjourn

Building Better IT Business Cases

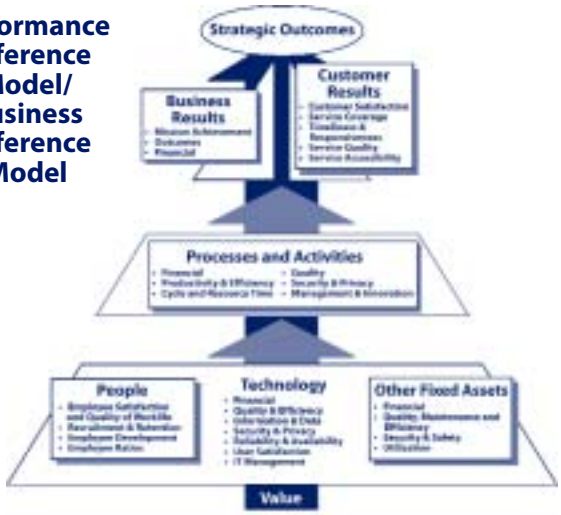
The Exhibit 300 process has been changed recently by the Office of Management and Budget. Agencies are now being asked to explain more precisely how their IT spending will support the achievement of agency missions. In order to comply with OMB mandates and achieve full funding for your IT projects, it is vital for your agency to stay on top of the latest changes and be aware of best practices for building better IT business cases.

KEY METHODOLOGIES COVERED

The Performance Reference Model (PRM) is a framework for IT performance measurement that provides common application measures for IT projects throughout the federal government. It allows agencies to better manage the business of government at a strategic level while providing a means for gauging progress.

The Business Reference Model (BRM) provides an organized, hierarchical construct for describing the day-to-day business operations of the Federal government. While many models exist for describing organizations - org charts, location maps, etc. - this model presents the business using a functional approach.

Performance Reference Model/ Business Reference Model



MEETS CORE COMPETENCIES FOR

Chief Technology Officers, Chief Information Officers, Program Directors, Financial Directors, Project Managers, Team Leaders, IT Strategists, IT Administrators

HOW YOU WILL BENEFIT

- Implement a performance-based management system that will both improve program performance and reduce costs
- Conduct a comprehensive alternatives analysis and assess risks to strengthen your budget justification
- Withstand the intense scrutiny of OMB's new mandates for performance data

DATES AND LOCATIONS

April 8-9, 2004 in Arlington, Virginia (Code: T158)
July 6-7, 2004 in Arlington, Virginia (Code: T159)

COURSE LEVEL: Advanced
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095

TRAINING CURRICULUM

Day One Agenda

9:00 **Update on OMB Directives and Development**
- President's Management Agenda and citizen-centered e-government
- Emerging guidance from the Office of Management and Budget
- Issues and concerns (participant feedback to OMB)

10:30 **Developing and Implementing Performance Measures**
- Discover the importance and value of performance measures relative to IT initiatives
- Utilize performance measures to assess government IT
- Develop performance measures to align IT goals with your agency's strategic mission using the Performance Reference Model

1:00 **"Top Ten" Ways to Significantly Improve the Quality of Your Exhibit 300 Submission (Part 1)**
- Identify and use ALL relevant guidance and instructions
- Develop quality responses to the "tough" questions
- Respond to subject areas that cross multiple sections, e.g. security
- Use available and reusable documentation to complete the exhibit
- Discover "gaps" between the evaluation criteria and the exhibit and how to develop a quality response to close the "gaps"

2:30 **"Top Ten" Ways to Significantly Improve the Quality of Your Exhibit 300 Submission (Part 2)**
- Apply project management techniques to complete the exhibit
- Integrate the Exhibit 300 process into your agency's life cycle management processes
- Identify key sections where "corporate standards" can be applied
- Establish roles for the IPT in the Exhibit 300 process

4:00 **Adjourn**
Informal question and answer session until 5:00

Day Two Agenda

9:00 **Alternatives Analysis and Financial Calculations**
- Identify standards that facilitate completion of calculations
- Develop cost models for the three required alternatives

10:00 **Investment Description and Justification**
- Apply lessons-learned from past exhibits to improve the section's technical and qualitative aspects
- Identify key "must-do" and "should-do" principles
- Identify source documents to help with these sections

11:00 **The President's Management Agenda**
- Learn the fundamental concepts of complying with the PMA
- Use PMA principles to strengthen your business case in other areas
- Identify OMB documents and web sites to help you align investment with strategy and measures

1:00 **Effective Project Management**
- Identify key project-management principles to create a project team
- Identify the key decisions to be made in sections I.D. and I.H
- Exploit a project management approach to facilitate completion

2:15 **Risk Inventory**
- Use a project management approach to complete the risk inventory
- Identify additional risk factors and execute risk-management.
- Learn a simple taxonomy for linking outcomes, outputs, assumptions and risks to measures

3:00 **Acquisition Strategy**
- Learn the fundamentals of Performance-Based Contracting
- Learn the fundamentals of a performance-based statement of work
- Apply the fundamentals to completing section I.G.

3:45 **Examining Part II**
- Develop the response to the Enterprise Architecture section
- Use NIST Special Publication 800-26 to satisfy FISMA and Exhibit 300
- Address GPEA, data quality, privacy and records management

4:45 **Adjourn**
Informal question-and-answer session until 5:30

Auditing and Improving Performance Information Systems

Effective performance management not only relies on the clarity of performance goals and measures, but also on the quality of the supporting information. When developing effective performance measures, a system must be in place to assess the validity and reliability of our performance information. Acquire the skills necessary to create a streamlined performance information system that supplies all managers with credible information to help drive the right decisions.

KEY METHODOLOGIES COVERED

This training will focus on the 11 key aspects of quality performance information, and ensure that a performance management framework, such as the Logic Model, is developed to communicate all key aspects. This framework will aid government managers in not only creating performance goals, but establishing criteria to determine the quality and credibility of performance information for government programs.

11 Key Aspects of Quality Performance Information

1. **Validity: Extent to which data reflects actual results (outcomes!) of the program (NOTE: requires clear link through intermediate outcomes to program outputs)**
2. **Usefulness: Relevance to management decisions**
3. **Reliability: "Reasonable accuracy" of data**
4. **Consistency: Data is collected in a consistent manner with same definitions and means of collection**
5. **Statistically significant: Data appropriately reflects the target population and is representative of the sampled universe**
6. **Timeliness: capable of being used to manage the program and make adjustments**
7. **Transparency: Data source, standards and methodologies for analysis are clear**
8. **Integrity: Data is free from bias (intentional or otherwise!)**
9. **Cost-Efficiency: Data collection costs (both financial and stakeholder burden) are appropriate**
10. **Security: Data is housed and used in an appropriate manner, with respect for privacy and sensitive information at all times**
11. **Verifiable: Independent assessments will corroborate reported results**

MEETS CORE COMPETENCIES FOR

Performance Measurement Evaluators, Program Analysts, Budget Officers, Auditors, Program Managers

HOW YOU WILL BENEFIT

- Integrating performance measurement development process with data quality standards
- Improving data standardization, validity and verification in government programs
- Designing performance measures that managers use to drive decisions, and to promote accountability and transparency

DATES AND LOCATIONS

August 9-10, 2004 in Arlington, Virginia (Code: P227)

COURSE LEVEL: Intermediate
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095

TRAINING CURRICULUM

Day One Agenda

9:00 Creating Reliable, Timely & Useful Performance Measurement Systems in Government
- Develop a performance measurement system that accounts for goals, measures and key outputs
- Communicate the essential steps necessary to ensure quality data

10:00 Designing and Reporting Performance Measures that Management and Managers Can Actually Use
- Update on new data quality standards guidelines issued from OMB
- Evaluate performance measurements based on relevancy, data collection costs, timeliness of information, and data source quality

11:15 Validity, Verification and Data Quality Standards for Government Performance Information Systems
- Lessons-learned on how data reflects programmatic outcomes
- Benefits of the development of data methodologies and auditing techniques to improve performance systems

1:15 Data Standardization Across Program Managers: Establishing Common Measures, Definitions and Reporting Standards
- Collect, categorize and report performance information
- Audit and detect inconsistencies in performance information
- Adhere to reliability and relevancy standards of information

2:45 Examining the Quality of Data Sources and Evaluating Costs and Benefits of Individual Measurements
- Define the measures used in management decisions
- Assess data collection, reporting and evaluation costs
- Examine the quality of data sources

3:45 Partnerships Session: Forging Manager - Auditor and Stakeholder Relationships to Improve Performance Measurement Quality and Use
- Establish beneficial auditor-manager relationships
- Define strategies for improving the quality of program partners to report meaningful and accurate performance information

4:45 Adjourn

Day Two Agenda

9:00 Creating a Comprehensive Maturity Model for Performance
- Set a quality threshold for performance information
- Streamline the number of performance measures
- Use measures to drive change in government

10:00 Best Practices for Implementing OMB Data Quality Guidelines
- Use model approaches and address complaints about data quality
- Improve data quality systems consistent with OMB guidelines

11:00 Technology Linkages: Using the Web, GIS, and other Technologies to Improve Performance Reporting Systems
- Integrate performance information systems with Geographic Information Systems
- Create online and electronic methods for tracking and reporting

1:00 CASE STUDY: A Measurement System that Drives Decision-Making
- Create reporting systems that aid in decision-making needs
- Integrate performance measurement and information technology strategies to drive data reporting and accountability

2:00 Application Workshop: Devising Performance Measures Consistent with Data Quality and Audit Standards
- Align performance goals and measures with agency data systems
- Address validity in the strategic design of your system
- Incorporate data standards into the strategic architecture of your performance measurement system

4:45 Adjourn

Program Evaluation and Analysis

With government program managers being held accountable for program results, it is increasingly important that program managers and evaluators communicate concerning program goals, outputs and measures as indicators for success. Program Evaluation and Analysis identifies the cause and effect relationship concerning program management, implementation and execution relying on program goals and measures to drive performance. Government managers will acquire the skills necessary to establish an effective blueprint for the organization to manage and communicate for results.

KEY METHODOLOGIES COVERED

This course will use the Government Performance Logic Model as a management framework to establish performance goals, outputs and activities and integrate performance measures to communicate the program's challenges and successes. The methodology provided will allow managers to canvass employees and stakeholders for feedback on the services provided as well as the outlined goals and measures for each fiscal year. Managers will also receive strategies on how to effectively communicate the results and feedback from the evaluation to improve program stewardship.

10 Steps to Successful Program Evaluation and Analysis

Step 1:	**Determine Evaluation Scope**
Step 2:	**Canvas program managers and stakeholders**
Step 3:	**Develop logic model to map existing activities, outputs and outcomes**
Step 4:	**Evaluate existing performance measures**
Step 5:	**Determine Quality of Existing and New Performance Data**
Step 6:	**Evaluate new performance data**
Step 7:	**Assess Causality between Programmed and Measured Results**
Step 8:	**Evaluate external issue landscape**
Step 9:	**Evaluate efficacy of internal management capacities**
Step 10:	**Devise evaluation report and formulate next steps**

MEETS CORE COMPETENCIES FOR

Program Managers, Program Evaluators, Performance Measurement and Analysis Staff, Strategic Communications Director, Strategic Planning Directors

HOW YOU WILL BENEFIT

- Creation of a performance-based evaluation blueprint to assess program performance and direction
- Determine causes and effects of performance goals, outputs, and performance measures
- Communicate success and challenges in program evaluation and analysis and drive change to employees, policy makers and customers

DATES AND LOCATIONS

August 11-12, 2004 in Arlington, Virginia (Code: P228)

COURSE LEVEL: Intermediate
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095

TRAINING CURRICULUM

Day One Agenda

9:00 **Trends and Methodologies in Program Evaluation and Analysis**
- Understand Legislative and Executive program evaluation initiatives
- Explore new tools and techniques in program evaluation

10:00 **Step 1: Determine Evaluation Scope**
- Identify expectations of policy makers
- Catalog program activities and expenditures to be evaluated

10:30 **Step 2: Canvas Program Managers and Stakeholders**
- Identify key internal personnel and external stakeholders
- Solicit input and viewpoints from managers and stakeholders

11:15 **Step 3: Map Existing Activities, Outputs and Outcomes**
- Create a performance management framework to outline program annual goals and long-term goals
- Align existing program activities and outputs to defined goals

1:15 **Step 4: Evaluate Existing Performance Measures**
- Identify outcome-oriented performance measures that communicate program goals, outputs and workload
- Assess what performance measures do not fall within the boundaries of management's framework

2:30 **Step 5: Determine Quality of Existing and New Performance Data**
- Ensure performance goals and measures meet OMB guidelines
- Develop data systems that support overarching performance data

3:30 **Step 6: Evaluate New Performance Data**
- Assess the availability and applicability of performance data
- Evaluate the collection process of performance data, and the reliability and credibility of data
- Assess the costs of new performance data

4:15 **Adjourn**

Day Two Agenda

9:00 **Step 7: Assessing Causality Between Program and Measured Results**
- Outline the cause and effect relationship among strategic goals, plans and accountability reports
- Determine the essential role of program performance goals and measures to provide feedback for improved performance

10:00 **Step 8: Evaluation of External Issue Landscape**
- Assess the external factors influencing program operations
- Conduct risk analysis of possible pitfalls and solutions facing a program due to external factors and internal responses

11:15 **Step 9: Evaluating Efficacy of Internal Management Capacities**
- Utilize a SWOT analysis to identify strengths and weaknesses
- Perform culture audit to identify employee and management resistance or acceptance to change

1:15 **Step 10: Devise Evaluation Report and Formulate Next Steps**
- Assess final impact of program evaluation and provide next step analysis to program managers to communicate solutions
- Identify key ingredients of program performance that need to be revised or created in order to improve overall program performance

2:30 **CASE STUDY: Best Practice Study on Implementation and Execution of Ten-Step Evaluation Process**
- Lessons learned on applying, executing and communicating the 10 steps of program evaluation

3:30 **Making Evaluation Reports Relevant to Stakeholders**
- Develop a performance-based communication and change management strategy to convey successes and challenges

4:15 **Adjourn**

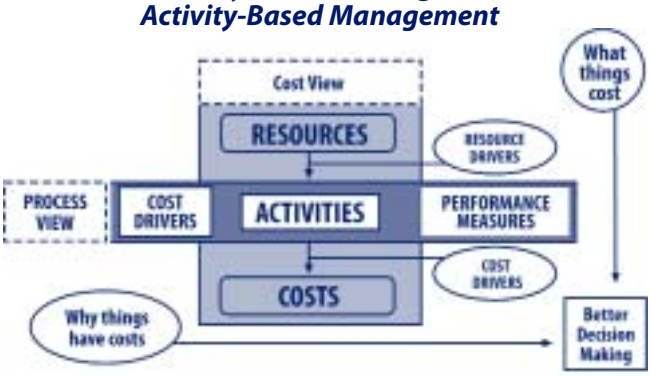
Managerial Cost Accounting

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 decisions based on the cost and impact of services provided. Through analysis and updates on managerial accounting standards and performance mandates, managers will acquire the skills necessary to make important decisions on cost of operations and program stewardship.

KEY METHODOLOGIES COVERED

This training will focus on providing managers the strategies they need to develop performance goals and measures and associate cost and resource allocation to meet those goals. By utilizing the Government Performance Logic Model as a management framework, managers can utilize activity-based costing and management as an aspect of managerial costing to integrate resource allocations to results. This training will help build manager competency in meeting federal accounting standards as well as performance mandates asked of financial management and managerial costing.

The ABC/M Cross
Activity-Based Costing and Activity-Based Management



MEETS CORE COMPETENCIES FOR

Chief Financial Officers and Deputy Chief Financial Officers, Accountants and Financial Analysts, Performance Measurement Staff, Budget Officers, Program Managers

HOW YOU WILL BENEFIT

- Keep up with the latest performance standards from OMB and integrate performance mandates with current cost accounting standards: GAAP and FASAB
- Learn best practice strategies on how to fully align your costs to the activities of your organization and to manage by them
- Measure the effectiveness of your organization by developing performance measures that illustrate the linkage from your activities and strategies to your end outcomes.

DATES AND LOCATIONS

March 22-23, 2004 in Arlington, Virginia (Code: P229)

COURSE LEVEL: Intermediate
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095

TRAINING CURRICULUM

Day One Agenda

9:00 Integrating Budget, Accounting and Performance Systems
- Get updates on budget and performance integration increasing rapidly in the federal government
- Learn how budgetary costs can be matched with programs and their performance goals

9:45 Achieving Full-Cost Accounting in Government
- Master the conceptual framework and technical insight for successful and relevant performance costing
- Understand flexibilities provided in the standards and how to maximize their benefits
- Learn how to converge cost and performance data to provide superior accountability

10:30 Developing Cost Information for External Reporting
- Integrate compliance standards to ensure your cost model meets reporting requirements such as GAAP and FASAB
- Utilize best practice techniques to survive audit scrutiny
- Implement successful techniques on cost information systems for internal management and external reporting

11:30 GAO's Emerging Line of Practice in Cost Management
- Learn innovative strategies and best practices to be prepared for Congressional scrutiny
- Develop an effective plan to successfully manage GAO audits
- Discuss challenges to mission performance facing auditors and managers

1:30 Using Cost Management to Inform and Drive Internal and Management Decisions
- Learn from after-action reviews how to drive change
- Stimulating continuous improvement initiatives

3:15 Adopting Your Framework for Cost Measurement and Allocation
- Define cost measurements role in the cost management process
- Understand allocation mechanics
- Specify cost measurement objectives

4:30 Adjourn

Day Two Agenda

9:00 Analyzing and Managing Cost Drivers
- Choose the correct cost driver
- Analyze cost drivers: examine a level-of-effort analysis

10:15 Navigating Common Costing Pitfalls: Avoiding Miscalculations in Costing
- Advanced allocation issues: choose between step down, reciprocal or direct
- Recognize and avoid pitfalls from over-costing errors
- Recognize and avoid pitfalls from under-costing errors

1:00 Winning the Cost War: Case Study on Managerial Costing from Pilot Program at U.S. Army Installations
- Review lessons learned on implementation barriers and successes
- Determine costs of mission-critical supplies

4:00 Adjourn

Information Technology Capital Planning

Capital planning and IT 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, well executed and use a clear investment strategy. You will emerge able to build a solid business case for your IT projects – one that fully is fully aligned with your agency's mission, and one that fully integrates information technology as a foundation of support for your agency's strategic plan in support of overarching agency goals and missions.

KEY METHODOLOGIES COVERED

The framework developed by the GAO, Information Technology Investment Management, utilizes a methodology comprised of key practices that contribute to attainment of a maturity stage. You will learn how to devise capital plans, how to manage an IT investment portfolio, and how to build an effective business case for your IT needs. The processes provide direction for a vigorous enterprise ITIM program while supplying best management practices for a practical, successful ITIM experience.

The Five Stages of Maturity Within ITIM



Source: GAO

MEETS CORE COMPETENCIES FOR

Chief Technology Officers, Chief Information Officers, Program Directors, Financial Directors, Project Managers, Team Leaders, IT Strategists, IT Administrators

HOW YOU WILL BENEFIT

- Develop methods for leveraging your IT investments to strategically shape business outcomes
- Understand the value of an effective IT business case and the role it plays in both IT investment and IT portfolio management
- Learn the disciplines involved in effective IT capital planning

DATES AND LOCATIONS

August 26-27, 2004 in Arlington, Virginia (Code: T162)
November 1-2, 2004 in Arlington, Virginia (Code: T163)

COURSE LEVEL: Intermediate
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095

TRAINING CURRICULUM

Day One Agenda

9:00 **IT Capital Planning Guidance and Mandates**
- Updates from the 2002 E-Government Act
- Understand the requirements of Clinger-Cohen and OMB Circulars A-130, A-11 and the Exhibit 300 and Exhibit 53 processes

10:30 **The Framework: Government Technology Maturity Model for IT Investment and Project Management**
- Understand the GAO framework and hear new updates
- Learn how the framework will provide a clear structure for assessing IT capital planning
- Learn how to apply the framework, how to benchmark against it, how to advance through the stages and implement best practices

Step-By-Step Walk Through: Information Technology Investment Management (ITIM)

1:00 **Stage One: Creating Investment Awareness**
- Recognize strategic elements and implementation methods
- Determine requirements for proposal justifications
- Conduct a risk analysis and establish success metrics

2:15 **Stage Two: Building the Investment Foundation**
- Determine IT investment board operation, project oversight and asset tracking
- Examine business needs for IT projects

3:15 **Stage Three: Developing a Complete Investment Portfolio**
- Use the Information Technology Investment Portfolio System (ITIPS)
- Establish authority alignment of IT investments boards
- Plan for technology acquisition and architecture development

4:30 **Adjourn**

Day Two Agenda

9:00 **Stage Four: Improving the Investment Process**
- Establish post-implementation reviews and feedback
- Ensure portfolio performance evaluation and improvement
- Apply system and technology succession management

10:30 **Stage Five: Leverage Information Technology for Strategic Outcomes**
- Ensure investment process benchmarking
- Implement IT-driven strategic business change
- Achieve fully-realized IT strategy

1:00 **IT Capital Planning: What Gets Measured Gets Done**
- Determine metrics for portfolio development
- Establish portfolio performance management
- Discover the tools and techniques for accurate performance measures

3:00 **CASE STUDY: IT Capital Planning**
- Acquire strategies and best practices from federal agencies using the ITIM framework

4:30 **Adjourn**

"Use a disciplined capital planning and investment control process to acquire, use, maintain, and dispose of information technology."

- OMB CIRCULAR A-11

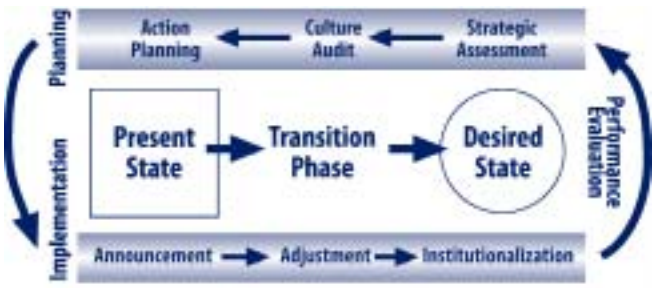
Leadership and Change Management

In a changing world, government agencies know that it takes more than good management and technology to succeed. The key to success today is to mobilize your people, to have a shared vision and responsibility, and to act quickly and vigorously to gain and sustain a competitive edge. Capabilities in leadership and change management are the essential skills that a successful manager must possess. The primary goal of this program is to provide concepts, understanding and tools to lead and engage your entire organization in planning and implementing change. Explore factors contributing to your leadership effectiveness and understand your leadership style and characteristics.

KEY METHODOLOGIES COVERED

This training will focus on developing leadership strategies and measures by applying OPM's Executive Core Leadership qualification as a template for leading change in government. Through the establishment of a six-step framework, government managers will be able to drive performance and accountability through their organization.

Planning & Managing Change



MEETS CORE COMPETENCIES FOR

Human Resource Directors, Training Managers, Staffing Directors, Diversity Managers, Human Resources Specialists, Program Managers

HOW YOU WILL BENEFIT

- Understand how to cultivate and build upon leadership
- Assess organizational culture to ensure readiness for adoption of new performance plans
- Manage the process of change in your organization

DATES AND LOCATIONS

April 13-14, 2004 in Arlington, Virginia (Code: P232)
June 30-July 1, 2004 in Arlington, Virginia (Code: P233)

COURSE LEVEL: Beginner
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095



TRAINING CURRICULUM

Day One Agenda

9:00 **Step One: Leading Change**
- Identify and integrate key issues affecting the organization
- Exercise leadership and motivate managers to incorporate vision
- Be open to change and new information

10:00 **Step Two: Leading People**
- Inspire, motivate and guide others in goal attainment
- Develop an effective performance management system
- Implement a cultural diversity program

11:00 **Step Three: Results-Driven**
- Understand linkage between administrative competencies and mission needs
- Formulate strategic program plans that assess program feasibility
- Set program standards

1:00 **Step Four: Business Acumen**
- Assess staffing needs based on organizational goals
- Establish the use of internal controls for financial systems
- Integrate and coordinate logistical operations

2:00 **Step Five: Building Coalitions**
- Develop and enhance alliances with external groups
- Establish and maintain working relationships with internal organizational units

3:00 **Step Six: Communication**
- Facilitate an open exchange of ideas
- Develop a plan to reflect the position and work of the organization in a clear, convincing and organized manner

4:00 **Adjourn**

Day Two Agenda

9:00 **Managing Change in Government**
- Frameworks required to manage change in your organization
- Understand organizational culture and acceptance for change

10:00 **Assessing Internal and External Resistance to Change**
- Assess need for change by examining stages of transformation
- Evaluate risk and assess the critical elements of change
- Ensure your organization can sustain change by building individual resilience

11:00 **Developing Change Management Strategies: Gauging Initiatives for Individuals, Teams and the Organization**
- Establish a strategy for overall investment in change initiatives
- Determine the potential and the speed of change
- Ensure a positive change process to allow future change initiatives

1:00 **Role of Effective Internal and External Communication in Leading Change**
- Examine how to best communicate change management initiatives to your internal workforce, to external stakeholders and to taxpayers

2:00 **Assessing Organizational Response and Performance: Ongoing Assessment of Decision-Making and the Change Initiatives**
- Establish quarterly reviews to re-assess performance measures and the execution of the strategic plan
- Continue constant internal and external communication to deliver key messages concerning project implementation

3:00 **CASE STUDY: Developing Change Leaders**
- Learn how to use leadership development programs to counter the loss of institutional knowledge and identify future leaders

4:00 **Adjourn**

Balanced Scorecard Management

As agencies are asked to improve management and meet performance mandates, it is essential that managers adopt performance management frameworks to help drive decisions. Through the implementation of the Balanced Scorecard framework, agencies not only align strategic goals with the strategic plan, but also help drive budget decisions and customer service measures. Government managers will acquire the skills necessary to develop performance goals and measures and to utilize the performance data to aid in management decisions.

KEY METHODOLOGIES COVERED

Government managers will be learning the balanced scorecard framework, and each component that makes up the overall management structure. Through the analysis and application of performance goals and measures, managers will develop the skills necessary to manage change and success in their organizations.



MEETS CORE COMPETENCIES FOR

Program Managers, Human Resources Professionals, Budget Officers Performance Measurement Staff, Program Evaluators

HOW YOU WILL BENEFIT

- Assess internal culture of organization to identify need for learning and development growth
- Develop management framework to help balance measures and identify mission-critical job functions
- Utilize framework to communicate success and need for improvement within organization

DATES AND LOCATIONS

October 18-19, 2004 in Arlington, Virginia (Code: P235)

COURSE LEVEL: Intermediate
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095

TRAINING CURRICULUM

Day One Agenda

9:00 **Importance of Performance Mandates and Management**
- Updates on performance management mandates
- Criteria for performance goals and measures

10:00 **Overview of the Balanced Scorecard**
- Focus on balanced scorecard management
- Discuss challenges, pitfalls and success to balanced scorecard

The Four Views of the Balanced Scorecard

11:15 **The Learning and Growth Perspective**
- Human Capital Planning and Strategic Human Capital Assessment
- Development of High performance work systems and communication tools

1:15 **The Business Process Perspective**
- Develop performance measures that communicate successful business processes
- Focus on outputs and activities that are tied to mission-oriented outcomes

2:30 **The Customer Perspective**
- Conduct stakeholder dialogues to communicate with customers for government services
- Develop customer and management satisfaction measures to communicate success in government services and stewardship of programs

3:30 **The Financial Perspective**
- Produce financial data to help resource allocation and make a business case as to budget justifications
- Tie performance measures on cost-efficiencies and resources into program goals to illustrate resource tie-in to strategic objectives

4:30 **Adjourn**

Day Two Agenda

Managing Change and Improvement

9:00 **Communicating and Planning for Change**
- Overview on importance of change management when developing and implementing new performance management framework
- Use change management strategies to assess workforce culture and readiness to change

10:00 **Applying a Balanced Scorecard Pilot Project**
- Assign one program to undergo pilot management process to serve as change agent and communicator for success and pitfalls
- Utilize pilot project to illustrate successes in management framework and to drive communication changes and successes through organization

1:00 **CASE STUDY: Applying Balanced Scorecard in the Field: Best Practices for Balanced Scorecard Management**
- Hear the proven best practices in using the Balanced Scorecard to drive management decisions
- Use of balanced scorecard measures to reduce programmatic cost and to improve program performance

2:00 **Application Workshop: Developing a Performance-Based Balanced Scorecard Management Plan**
- Hands-on development of a performance-based balanced scorecard
- Develop results-oriented performance measures to drive management decisions and communicate cost reduction
- Application of performance management framework tailored to individual programs

4:30 **Adjourn**

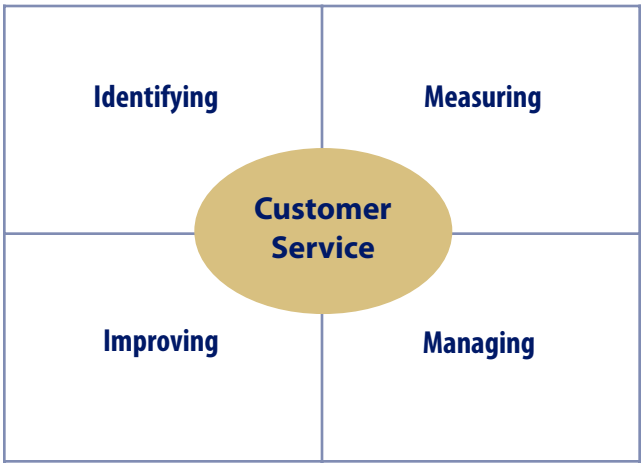
Customer Service Measures and Strategies

In any government organization, services provided must be citizen-centered and results-oriented. To ensure that programs are meeting customer expectations, it is essential that the customer service function develop measures and strategies to identify, improve and manage the function. Strategies presented in this training will aid customer service managers in developing and measuring a truly performance-based customer service department that provides effective services to identifiable customers.

KEY METHODOLOGIES COVERED

This training will focus on providing government managers with the skills necessary to solve common customer service challenges and provide solutions. This step-by-step approach allows managers to identify expectations and services, measure the performance of customer service, use those measures to improve the function, and continually manage the improvements to create a high-performing organization.

Coordinated Processes For Improving Customer Service



MEETS CORE COMPETENCIES FOR

Customer Service Managers, Project Leaders, Human Resource Professionals, Customer Quality Specialists, Public Affairs Staff

HOW YOU WILL BENEFIT

- Assess customer service needs and services to ensure performance-based operation
- Identify areas of improvement and innovation in customer service management
- Manage and measure the customer service function to ensure continued success and feedback

DATES AND LOCATIONS

June 24-25, 2004 in Arlington, Virginia (Code: P234)

COURSE LEVEL: Intermediate
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095

TRAINING CURRICULUM

Day One Agenda

9:00 Trends and Methodologies in Customer Service Management
- Overview on key performance trends being used to manage customer service function in government
- Focus on the development of key goals and measures to manage the customer service function

10:00 Identifying Agency Products and Services and Building Customer Matrix
- Develop a Customer Matrix to define who your customers are
- Identify the products and services delivered by your organization and assess the customer service role

11:15 Determining Customer Expectations: A Values-Based Approach
- Identify the key values sought by customers for each agency service
- Map values to attributes of agency services

1:15 Business Process Reengineering into a Customer-Centered Agency
- Map and reorganize work processes to improve services
- Determine key activities and service levels that must be maintained to maximize customer value

2:30 One-Stop and Integration of Customer Services
- Identify key services that customers use in relation to each other
- Devise self-help and one-stop centers to integrate services

3:30 CASE STUDY: Managing Organizational Change and Transition to Customer-Centered Agency
- Identify internal and external obstacles to service improvements
- Acquire lessons learned in improving government customer service

4:30 Adjourn

Day Two Agenda

9:00 Training and Staff Development for Customer Service Improvements
- Identify the core workforce competencies linked to customer service strategy
- Devise and implement customer service training curriculum for each agency service area

10:00 Providing Employee Evaluation Incentives for Customer Service Improvements
- Define and set targets for individual employee contribution to customer service improvements
- Conduct employee evaluation feedback and rewards programs linked to customer service goals

11:15 Customer-Relationship Management: A Government Adaptation
- Harness the power of technology to track initiation, status, and fulfillment of customer service requests
- Create customer profiles that track customer information, service status and performance

1:00 Managing Responsiveness and Resolution of Customer Complaints
- Implement a resolution process for customer complaints
- Devise a set of resolution options for common complaints

2:15 Performance Measures for Customer Service
- Develop, implement and evaluate performance measures
- Identify and use benchmarks from customer service leaders

3:15 Designing and Implementing Customer Surveys and Feedback Systems
- Determine the legalities of the use of surveys and other collection methodologies
- Develop a continuous improvement feedback system

4:30 Adjourn

Strategic Human Capital Planning

Those that say the "Human Capital Crisis" has already been averted are overlooking one crucial detail: half of the civilian workforce will still be eligible to retire in a few months. That fact is still a reality unaffected by the nation's economic state. Developing and implementing a strategic approach to human capital management ensures that agency human capital policies and systems are aligned with strategic goals and that you will be able to motivate the best and brightest to join public service. The plan will provide a framework for assessing current activities, designing and implementing new programs where needed and monitoring and evaluating activities and outcomes.

KEY METHODOLOGIES COVERED

This training will focus on developing a performance-based human capital plan by applying the Seven-Step methodology as a template for developing a results-oriented human capital plan for your government programs. This framework is derived from best practices at all levels of government and is compliant with the OPM standards for success and GAO guidance.

Building Human Capital Plans
Seven Steps Using the Logic Model

Input	← Activities	← Outputs	← Intermediate Outcome Strategies	← End Outcomes
$, FTE				

"Program" Pre-requisites to Human Capital Plan

Human Capital Plan Alignment

Typical Areas for HR Measurement

Step 1: Gain Leadership and Stakeholder Involvement
Step 2: Align to Mission, Outcomes, and Intermediate Outcomes
Step 3: Conduct Workforce and Skills Assessment (For Each Program)
Step 4: Define Restructuring and Redeployment Strategies
Step 5: Define Workforce Development Strategies
Step 6: Define Performance Management Strategies
Step 7: Set HR Measures and Targets

MEETS CORE COMPETENCIES FOR

Human Resource Directors, Staffing Directors, Workforce Analysts, Recruiting Directors, Human Resources Specialists

HOW YOU WILL BENEFIT

- Develop a framework for strategic recruitment that begins with workforce analysis and ends with effective performance measures
- Assess workforce needs based on your agency's strategic plan and project workforce gaps
- Establish performance goals that ensure successful recruitment and retention

DATES AND LOCATIONS

May 17-18, 2004 in Arlington, Virginia (Code: P236)
August 23-24, 2004 in Arlington, Virginia (Code: P292)
November 8-9, 2004 in Arlington, Virginia (Code: P269)

COURSE LEVEL: Intermediate
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095

TRAINING CURRICULUM

Day One Agenda

9:00 **Step One: Project Launch: Managing Senior Leadership and Stakeholder Involvement**
- Solidify senior leadership and stakeholder support for an integrated human capital strategic management process
- Create a team for Human Capital Assessment and Accountability

9:30 **Step Two: Mission Alignment: Clarifying Mission, Goals and Strategies of the Organization**
- Build a human capital plan using the GPRA Strategic Plan as a base
- Use a Logic Model approach to clarify mission, goals and strategies

10:30 **Step Three: HR Alignment: Identifying the Role HR can play to Achieve Program Goals**
- Focus on HR contributions to agency performance goals
- Align HR functions to deliver desired performance

12:45 **Step Four: Workforce Assessment: Building Your Skills Inventory**
- Determine core competencies and workforce profiles needed for optimum agency performance
- Conduct a gap analysis between current and desired state

1:45 **Step Five: Workforce Development Strategies: Training, Development, Recruitment, and Succession Planning**
- Set recruitment and retention goals for skill areas and management
- Overcome skill gaps with professional development, talent management and knowledge management systems

2:45 **Step Six: Performance Management Strategies: Creating an Employee Performance Management System**
- Devise employee performance evaluation and reward systems
- Cultivate a performance-based culture in your workforce

3:30 **Step Seven: HR Performance Measures: Establishing Performance Measures for HR Functions**
- Develop performance measures for HR processes and systems
- Implement performance reporting and accountability systems

4:15 **Adjourn**

Day Two Agenda

9:00 **Workforce Assessment and Analysis**
- Anticipate how the nature of your agency's work will change and identify future HR requirements
- Assess workforce needs based on your agency's strategic plan and project workforce gaps

10:45 **Succession Planning and SES Development**
- Create SES development plans that are in alignment with your agency's workforce assessment
- Identify skill gaps caused by retirement, inter agency transfers and predictable employee turnover

1:00 **Managing and Creating HR Data Systems**
- Reduce the resources, staff time and costs associated with payroll and benefits processing

2:00 **CASE STUDY: Aligning HR Activities to Agency Mission**
- Set performance expectations for individuals to channel their efforts toward organizational objectives
- Reward employee performance and acknowledge their contribution to the agency's mission

3:30 **APPLICATION SESSION: Scenario and Planning Exercise**
- Determine how to roll out strategic human capital plans in order to achieve organizational change

4:15 **Adjourn**

Project Management for Government

Government programs of all types, both at the federal and state levels, are being held accountable for their performance and streamlined allocation of funds and resources in these fiscally tight times, all the way down to the project management level. Within even well-managed organizations, there is often a lack of coordination between the work that has to be done and the resources needed to do it, and there are almost always critical time constraints on the results as well. At this training, you will walk through a performance framework for project management and learn how to turn those metrics into a roadmap for effective performance-based management.

KEY METHODOLOGIES COVERED

This training will give managers the tools necessary to assess and develop effective plans and blueprints for managing multiple projects. Having sufficient time, defining the technical performance, and planning the allocated resources is critical to mitigating risk and tracking overall project performance.

Critical Elements in Effective Project Management



MEETS CORE COMPETENCIES FOR

Human Resource Directors, Government Project and Program Managers, Performance Management Staff, Program Analysts

HOW YOU WILL BENEFIT

- Explore project management methodologies that can increase your project's performance
- Develop performance measures and strategies for project management
- Establish indicators and evaluation techniques for your project

DATES AND LOCATIONS

May 6-7, 2004 in Arlington, Virginia (Code: P238)
August 30-31, 2004 in Arlington, Virginia (Code: P241)

COURSE LEVEL: Beginner
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095

TRAINING CURRICULUM

Day One Agenda

9:00 **Overview of Project Management Mandates and Methodologies**
- Overview of federal, state and local trends
- Update on the Budget and Enforcement Act of 1990
- News about OMB Circulars

10:00 **Step 1: Define Project Goals**
- Select the level of staffing, resources, and management support required
- Assemble a project team and gain commitment on project objectives

11:00 **Step 2: Assess Implementation Obstacles**
- Estimate time and costs and present a project plan to team members and stakeholders
- Conduct a thorough risk assessment

1:00 **Step 2 Continued: Overcome Implementation Obstacles**
- Diagnose employee resistance and create a successful action plan
- Discover critical techniques for anticipating and managing reaction

2:30 **Step 3: Determine Project Activities**
- Develop project objectives, clarify the scope and develop the project requirements

4:00 **Adjourn**

Day Two Agenda

9:00 **Step 4: Define Schedules and Milestones**
- Build a network of achievements
- Assign tasks to individuals within the work breakdown structure

10:00 **Step 5: Determine Resources for Projects**
- Lay out clear assignments for your team and a foundation for tracking actual results
- Win management support and obtain necessary resources

11:00 **Step 6: Execute and Manage Projects**
- Develop an effective schedule for the project within the availability constraints of your team members
- Monitor, document, and report project progress and problems

1:00 **Step 7: Measure and Evaluate Project Performance**
- Develop performance measures aligned to program results
- Deal with project uncertainties and handle the risk of performance management

2:00 **CASE STUDY: Project Management Techniques**
- Learn tips from the trenches for completing a project effectively, on time, and within budget

3:00 **Effective Communications throughout the Project Life Cycle**
- Develop meaningful relationships with stakeholders and management
- Develop practical strategies for integrating technology into your project management plan

4:00 **Adjourn**

"The Office of Management and Budget promises to pull the plug on projects that lack good project management strategies….projects submitted in September for funding in the 2005 budget will be scrapped unless they stay within 10 percent of budget, schedule and performance, and are assigned a qualified project manager."

- FEDERAL TIMES (12/1/03)

Employee Performance Development

Government agencies have long sought to recognize, reward and retain outstanding employees, but the civil service system has made that extremely difficult to accomplish. New mandates currently exist that allow government managers more flexibility to reward employees, but agencies may not use the higher pay caps unless OPM and the Office of Management and Budget certify that their executive performance plans make "meaningful distinctions based on relative performance." Acquire the skills necessary to further emphasize employee success and transform those employees into the leaders of tomorrow.

KEY METHODOLOGIES COVERED

This training will focus on developing performance-based employee evaluations by applying OPM core competencies as a template for ensuring a results-oriented plan. This framework is derived from best practices at all levels of government and is compliant with Merit Systems Protection Board.

Human Capital Standards from the Office of Personnel Management

1. Strategic Alignment
2. Workforce Planning and Deployment
3. Leadership and Knowledge Management
4. Results-Oriented Performance Culture
5. Talent
6. Accountability

MEETS CORE COMPETENCIES FOR

Human Resource Directors, Outsourcing Specialists, Labor Relations, ADR Specialists, Personnel/Employee Services

HOW YOU WILL BENEFIT

- Align employee development plans with agency human capital and strategic plans
- Ensure that meaningful distinctions are made between outstanding and adequate employees, and that relevant rewards are given
- Set goals and allocate human capital and other resources to meet those goals effectively

DATES AND LOCATIONS

July 28-29, 2004 in Arlington, Virginia (Code: P242)

COURSE LEVEL: Intermediate
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095

TRAINING CURRICULUM

Day One Agenda

9:00 Performance Development Mandates and Trends
- Progress on the Presidents Management Agenda (PMA)
- Updates on the Homeland Security Act
- Performance evaluation best practices and lessons learned from federal, state and local levels

10:00 Adopt a "Performance-based" Approach to Employee Development
- Align your employee development plan with agency strategic plans
- Build employee development plans that reinforce the requirements of the human capital plan to achieve mission results
- Use workforce analysis results to keep plans aligned and targeted

1:00 Developing the Plan
- Develop a performance measurement system using the Logic Model as a framework
- Align individual plans to the organization's performance measurement system
- Focus on the performance results of the organization to build a better product

3:00 Federal Case Study: Competency Model
- How to maintain a highly skilled, energized, and empowered workforce that is focused on results
- Identify approaches to change workforce behavior

4:00 Adjourn

Day Two Agenda

9:00 Monitoring, Counseling and Coaching Employees
- Serve as a basis for professional development opportunities
- Encourage and improve communication between employee and supervisor
- Assist employee and supervisor in identifying future performance goals and objectives

1:00 Discussing Performance Improvement
- Establish what improvements are needed and the timeframe for achievement
- Identify potential solutions to performance problems
- Develop a performance improvement plan
- Obtain employee's commitment to the plan

2:00 Communicating Your Plan: Explaining the Value of Employee Development Programs
- Create an infrastructure that facilitates open communication among all employee ranks
- Communicate the plan frequently and consistently throughout the organization
- Perform six-month and year-end evaluations
- Promote continuous improvement of communication systems and processes

4:00 Adjourn



Performance-Based Grants Management

As we move closer and closer to a fully results-oriented management system in government, grant making agencies and non-profit organizations have to enforce the meeting of specific performance standards in order to continue qualifying for federal and state financial assistance. This increased focus on performance goes hand-in-hand with a sizable improvement in financial transparency and overall program accountability, and redefining various challenges for grants managers. By incorporating a tailored set of measures, in line with the outcomes, strategies and outputs for their specific program, grants managers can effectively track their program success, from the receipt of the application, throughout the review, awarding, and monitoring of the funding.

KEY METHODOLOGIES COVERED

This training will provide grant managers with the skills necessary to design and award grants that are performance-based in their origin and that incorporate evaluation and reporting strategies within their structure. Through the use of the Government Performance Logic Model framework, both managers and recipients will be able to focus on developing performance goals, timelines and resource allocation strategies specific to each grant or program. Through the incorporation of outcome-oriented performance measures, managers will be able to communicate, monitor and enforce the compliance requirements that will guarantee a successful closing or extension of the grant.

Ten-Steps for Improving Grant Management

Step One: Comprehensive Framework for Performance Measures and Evaluation for Grants
Step Two: Establishing Your PBGM Team
Step Three: Streamline the Grants Terms and Conditions
Step Four: Designing Performance Measures and Including them in RFP's and/or Grant Applications
Step Five: Optimize the Solicitation, Review and Award Processes
Step Six: Select the Right Grantee
Step Seven: Evaluating the Progress of your Grantee
Step Eight: Assisting Grantees with Implementing Effective Performance Measures
Step Nine: Using Third-Party Evaluators to Assess Grantee Performance
Step Ten: Post-Award Monitoring, Oversight and Review

MEETS CORE COMPETENCIES FOR

Grant Makers, Grant Monitors, Program Administrators, Grant Writers, Evaluators, Community Foundation Administrators

HOW YOU WILL BENEFIT

- Integrate performance measurement data into the grant process
- Comply with the latest auditing standards
- Strengthen and streamline your grant-management strategies

DATES AND LOCATIONS

June 14-15, 2004 in Arlington, Virginia (Code: S151)
Sept. 30-Oct. 1, 2004 in Arlington, Virginia (Code: S152)

COURSE LEVEL: Intermediate
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095

TRAINING CURRICULUM

Day One Agenda

9:00 **Overview of Federal Grants Management, Circulars and Regulations**
- Understand applicable legislation and compliance issues
- Discuss the pros and cons of developing and implementing performance measures to evaluate grant program success

9:45 **Trends and Methodologies for Performance-Based Grants Management and Evaluation**
- Understand emerging accountability and transparency issues in grants management
- Incorporate performance measures in your awarding strategy for managing, tracking and evaluating

The Stepped Approach to Maximum Efficiency

10: 45 **Step One: Comprehensive Framework for Performance Measures and Evaluation for Grants (Lessons for Funders and their Grantees)**
- Develop a framework for measuring grant program performance
- Utilize logic modeling to link end outcomes to specific grant program activities

1:15 **Step Two: Establishing Your PBGM Team**
- Identify all stakeholders for grants programs
- Align individuals' responsibilities to the project's mission

2:30 **Step Three: Streamlining the Grants Terms and Conditions**
- Benchmark the purpose, objective and projected outcome of a grant, and advertise the available assistance in required media
- Determine the key components of each grant

3:30 **Step Four: Designing Performance Measures and Including Them in RFP's and/or Grant Applications**
- Design performance measures as part of the RFP and educate potential grantees of the role of performance measures
- Develop RFP's to measure appropriate outcomes

4:30 **Adjourn**

Day Two Agenda

9:00 **Step Five: Optimize the Solicitation, Review and Award Processes**
- Streamline the solicitation and award criteria
- Conduct efficient and productive market-sector research

10:00 **Step Six: Select the Right Grantee**
- Evaluate past grantee performance
- Determine the "best value"
- Assess potential conflicts of interest

11:15 **Step Seven: Evaluating the Progress of your Grantee**
- Determine the type of follow-up required
- Assess the grantee's operational and financial capacity to overcome performance obstacles, take corrective action and report progress

1:00 **Step Eight: Assisting Grantees with Implementing Effective Performance Measures**
- Link performance measures to budgeting and staffing
- Making performance measurement and evaluation part of everyday functioning and improvement

2:15 **Step Nine: Using External Evaluators to Assess Grantee Performance**
- Develop a value-added approach to using third-party evaluators
- Balance the need for an expert evaluator with the need to incorporate evaluation into capacity building for grantees

3:15 **Step Ten: Post-Award Monitoring, Oversight and Review**
- Determine whether positive changes have been demonstrated
- Devise clear measures of performance and accountability

4:15 **Adjourn**

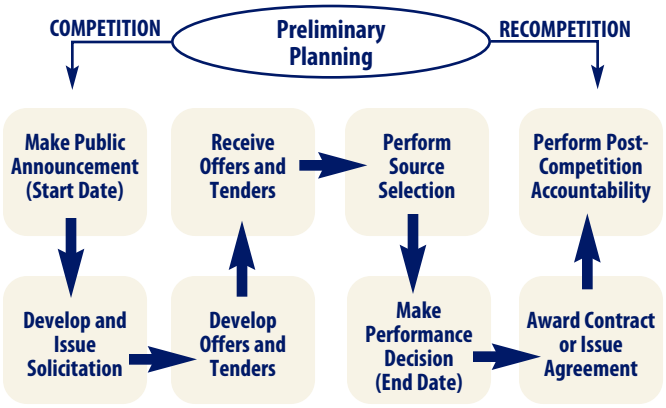
Competitive Sourcing

Competitive sourcing and government-wide acquisition has dramatically changed in the past year due to the revisions of OMB Circular A-76 and new procurement legislation. With the most recent developments, agencies are now facing changed rules and regulations regarding public-private job competitions and need to acquire the proper training in order to successfully fulfill their responsibility in the job competition process. Developing a strategy for competitive sourcing and conducting compliant job competitions are critical to establishing cost efficiency and achieving success in the A-76 process.

KEY METHODOLOGIES COVERED

To assist agencies in evaluating performance and costs of commercial activities, the Performance Institute uses a Logic Model approach to develop performance benchmarks and costs for activities. The Logic Model has been used by OMB for guidance relating to budget-performance integration as well as information technology budget justifications. By using the Logic Model for competitive sourcing, agencies can fully integrate the five PMA elements into a comprehensive approach to management - and meet the new performance accountability and "cost realism" standards of the revised A-76 process.

The Standard Competition Process



MEETS CORE COMPETENCIES FOR

Chief Acquisition Officers, Senior Procurement Executives, Competitive Sourcing Officials, Competitive Sourcing Team Members, Human Resource Professionals, Federal Contract Administrators, Procurement Officials, Acquisition Managers

HOW YOU WILL BENEFIT

- Meet the challenges and understand the requirements of the A-76 process
- Discover best practices and implementation models
- Understand new Congressional initiatives and legislation

DATES AND LOCATIONS

April 19-20, 2004 in Arlington, Virginia (C135)
July 12-13, 2004 in Arlington, Virginia (C139)
November 15-16, 2004 in Arlington, Virginia (C141)

COURSE LEVEL: Advanced
FORMAT: Lecture, group discussion, class exercises and simulation
TUITION: $1095

TRAINING CURRICULUM

Day One Agenda

9:00 **Update: 10 Major Changes to Circular A-76**
- Step-by-step briefing on modifications
- Understand new roles and responsibilities
- Hear detailed analysis of impacts

Master the A-76 Process

10:00 **Public Announcement**
- Devise an announcement to be sent to Congress
- Inform the local workforce
- Utilize local workforce to assist team of analysts

11:00 **PWS/QASP**
- Target specific results and outcomes
- Devise performance measures, standards and timeframes
- Describe methods of inspection, required reports and resources to be used, including estimated work hours

1:15 **Developing Most Efficient Organizations**
- Identify the organizational structures, staffing and operating procedures, equipment and transition and inspection plans
- Ensure that the government can perform the activity cost-effectively
- Estimate the cost to perform the functions described in the PWS

2:45 **Solicitation**
- Develop and issue a solicitation (request for proposal)
- Determine which type of contract to use for the solicitation
- Develop the necessary criteria for evaluating contractor offers

4:00 **Adjourn**

Day Two Agenda

Master the A-76 Process (Continued)

9:00 **Independent Review**
- Comply with the procedures and requirements described in the revised supplemental handbook (RSH)
- Certify that the management plan establishes the government's ability to perform within its resources
- Review all six of the major deliverables of the cost comparison

10:30 **Contract Proposals Due and Negotiation Begins**
- Document the selection of the single contractor who will compete with the MEO
- Select the contractor through a "best value" source selection process
- Include sealed bids, two-step source selection, cost technical trade-off or other competitive qualifications

1:15 **Cost Comparison to Implementation**
- Meet the performance standards accepted by the SSA
- Develop a transition plan
- Establish the MEO's ability to perform the services of the PWS

3:00 **Tying it All Together: A Walk-Through of the New Public-Private Competition Process**

Perhaps the most important changes in the A-76 process deal with the source selection and bid evaluation processes which are designed to make competitive sourcing more "performance-based" and use a "best value" approach to determine winners of competitions. In this session, participants will walk through the entire process governing source selection and emerge with best practices for managing these five aspects of the A-76 process:

1. When to Use Sealed vs. Negotiated Bid: FAR Part 7
2. Low Priced Technically Acceptable Source Selection
3. Cost/Technical Tradeoff Source Selection
4. Integrated Evaluation Process
5. Phased Evaluation Process

4:30 **Adjourn**

About The Performance Institute



Transferring Knowledge to Transform Government

The Performance Institute is a private think tank seeking to improve government performance through the principles of competition, accountability, performance and transparency. The Institute serves as the nation's leading authority and repository on performance-based management practices for government. Our mission is to identify, study and disseminate the leading management innovations pioneered by "best-in-class" organizations.

Through its national conferences on pressing issues, interactive training programs for government managers, 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 and enhance organizational performance.

The Performance Institute

Online at:
www.performanceweb.org

The Nation's Leader in Government Performance Management

The Performance Institute is the nation's largest and most influential government reform think tank.

More than 10,000 government managers participate in the Institute's forums and research projects each year. With offices on both coasts, the Institute is staffed by experts passionate about reforming government, and maintains an impressive array of expert advisory boards in many policy areas.

The Institute has testified on a wide range of government reform issues before Congress and state legislatures. With its emphasis on performance-based management reforms, the Institute has evaluated numerous government programs and initiatives and has offered recommendations for improving cost efficiencies and performance results. Its white papers and analyses are routinely used by government officials to reform programs, shape policy and drive change.

Stay Current on Government Performance Mandates

PerformanceWeb.org is fully loaded with the latest news and research on government performance initiatives, including some of the best presentations from Performance Institute conferences and forums. You can also sign up to receive the Institute's free government management reform e-newsletters!

Extensive Research on Government Performance Management

The Performance Institute identifies, studies and disseminates the leading management innovations pioneered by "best-in-class" organizations. A strictly non-partisan organization, the Performance Institute serves as the nation's leading repository of thoroughly researched, documented, catalogued and peer-reviewed "best practices" in a multitude of issue areas.

The Institute's recent research portfolio includes published reports on the federal government's implementation of reforms in the areas of competitive sourcing, electronic government, and strategic recruitment of human capital. The Institute also publishes TransparentGovernment.org, a comprehensive web site analyzing the federal government's performance-based budgeting initiatives, including the Program Assessment Rating Tool. The Institute is also immersed in management reform on the state level, publishing the *Citizens' Budget*, a comprehensive line-by-line analysis of the FY04 budget of the State of California.



Registration

How Can I Register?

1. ONLINE at www.performanceweb.org
2. VIA FAX to 703-894-0482
3. VIA PHONE to 703-894-0481
4. VIA MAIL to 1515 N. Courthouse Road, Suite 600, Arlington, VA 22201

DELEGATE INFORMATION

NAME

TITLE

OFFICE

ORGANIZATION

ADDRESS

CITY | STATE | ZIP

TELEPHONE | FAX NUMBER

E-MAIL

PAYMENT INFORMATION

- ☐ TRAINING FORM
- ☐ PURCHASE ORDER
- ☐ CHECK (Accepted by mail only)
- ☐ CREDIT CARD

CREDIT CARD NUMBER

EXPIRATION DATE

NAME ON CARD

COURSE SELECTIONS

- ☐ PLEASE ENROLL ME IN THE PERFORMANCE MANAGEMENT CERTIFICATION PROGRAM
- ☐ DO NOT ENROLL ME IN THE PERFORMANCE MANAGEMENT CERTIFICATION PROGRAM

PLEASE REGISTER ME FOR THE FOLLOWING COURSE(S):

PROGRAM CODE	PROGRAM NAME	TUITION
		$1095
		$ 895*
		$ 795*
		$ 695*
		$ 495*
		$ Free*

* To qualify for these discounted tuition rates, you must register and submit payment for all of the programs at the same time. If you choose to register for courses individually, you will be charged the full amount each time.

Need help customizing your training program?

Call one of our curriculum managers at 703-894-0481.

CANCELLATION AND QUALITY ASSURANCE POLICY

A 10 percent cancellation fee on the total tuition will be charged for cancellations received less than three weeks from the date of the course.

The Performance Institute strives to provide participants with the most valuable learning experience possible. If after attending a training course you are dissatisfied with your learning experience, we encourage you to please contact the Director of Education Services at 703-894-0481.

TRAINING LOCATION

All of the training courses listed in this catalog will be hosted at The Performance Institute in Arlington, Virginia, just minutes from downtown Washington, D.C. The Institute is located conveniently at the Courthouse stop on the Metro's Orange Line, and parking is available in the building's garage. Continental breakfast, lunch, and snacks are provided. For more information or for detailed directions, please call 703-894-0481.

GSA Schedule

Easy Access to Institute Consulting Services through MOBIS

(PI MOBIS Contract Number: GS-10F-0261M)

SUBMITTING THIS REGISTRATION FORM



Fax this form to The Performance Institute at 703-894-0482. A confirmation of your registration will be faxed back to you at the number you provide above within two (2) business days. If after 48 hours you have not received a confirmation, please call Customer Service at 703-894-0481.



or mail this form (and check, if applicable) to:

The Performance Institute
attn: Customer Service
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