The Only Event of the Year Focusing Exclusively on All Five PMA Reforms

"Get to Green" on the PMA!

Implementing the President's Management Agenda

Year 2

2003 Government Performance Summit

Rising Expectations... Emerging Innovations

BUDGET-PERFORMANCE INTEGRATION
HUMAN CAPITAL MANAGEMENT
IMPROVED FINANCIAL MANAGEMENT
COMPETITIVE SOURCING
CITIZEN-CENTERED E-GOVERNMENT

Presented by:

The Performance Institute

Excellence — The Council for Excellence in Government

Reason

National Academy of Public Administration

ASPA

Institute for the Study of Public Policy Implementation

The George Washington University Department of Public Administration

Coalition for Effective Change

Senior Executives Association

The Heritage Foundation

Partnership for Public Service

PMA Implementation Updates

PMA "initiative owners" presenting status reports on the progress made and the next-step expectations in each of the five goal areas

Town Hall Dialogues on PMA Challenges and Solutions

Facilitated dialogues offering peer-to-peer exchanges of helpful practices for PMA implementation

"Getting to Green" Case Studies

Lessons learned and strategies from agencies recognized for achieving results with the PMA reforms

Breaking Down Barriers

Leveraging and integrating each PMA goal with the other four goals in a coordinated, comprehensive management system



Implementing New Solutions

Details on new civil service flexibilities, a federal e-government architecture, and a reformed competitive sourcing process

Achieving Measurable Success

Strategies on how to integrate policy agendas with the PMA in each department, as well as produce some clear "success stories" by mid-2004

February 24-26, 2003
Washington, D.C.

www.governmentperformance.org

"Get-to-Green" on the President's Management Agenda Scorecard!

BUDGET-PERFORMANCE INTEGRATION

Linking Resources to Results through Performance Measurement and Results-Based Budgeting

STRATEGIC HUMAN CAPITAL MANAGEMENT

Conducting Workforce Assessments, De-Layering Program Management, and Aligning Personnel Management to Performance

CITIZEN CENTERED e-GOVERNMENT

Designing Citizen-Centered Electronic Government Initiatives through Capital Planning, Performance Measurement, Investment Management and Inter-Agency Partnerships

FINANCIAL MANAGEMENT IMPROVEMENT

Improving Agency Financial Management, Reducing Improper Payments and Accurate Cost Information

COMPETITIVE SOURCING

Conducting Public-Private Competitions and Outsourcing Under the Recently Revised A-76



2003 Government Performance Summit

Dear Government Executive:

On February 7, 2003, President Bush will release his FY '04 budget request along with a progress report and traffic light scores on the progress being made by each federal agency in the implementation of the President's Management Agenda (PMA). Now two years into the Bush Administration, the PMA—with its five management reform goals—has become the driving force behind the efforts of the Administration and federal managers to improve government performance.

You are invited to explore the latest innovations in fully implementing the PMA reforms and achieving management improvement success at the *2003 Government Performance Summit: Year Two of Implementing the President's Management Agenda*, being hosted this year on February 24-26 in Washington, D.C.

Stay Current with the Latest News on the President's Management Agenda

The Office of Management and Budget, Office of Personnel Management and Congress have revised guidelines, rules and statutes to improve government performance. From a revised A-76 process for competitive sourcing and the PART budget tool to the expanded civil service flexibilities created by the Homeland Security Act and the new mandates of the 2002 e-Government Act, agencies have a wealth of new management improvement tools at their disposal. You will emerge from this timely event with the latest news and policy guidance in all five areas of the President's Management Agenda.

Getting to Green: Innovations from Leading Federal Agencies

During the past year, each federal agency has launched initiatives in the five PMA goal areas designed to improve the performance and results of their programs. The lessons learned and ideas for next steps from initial implementation efforts are pouring in. This timely conference will provide comprehensive coverage of emerging best practices being pioneered in each federal agency. Sessions will provide "how-to" advice on designing and implementing initiatives in each of the five management goal areas.

A Timely Event...Providing Comprehensive Coverage of Federal Management Improvement

The management reforms called for in the PMA must be viewed and implemented using an integrated approach. The barriers and "silos" that have often separated the management functions of finance, acquisition, human resources, policy, planning, budget and technology have to be broken down. This event focuses on how to bring those functions together into a strategic approach to federal agency management.

No Other Event Addresses ALL Aspects of the President's Management Agenda! Reserve Your Spot Today!

This conference offers you and your team the opportunity to master the new approaches to management in the federal government in ways that are guaranteed to deliver tangible results and improvements. Ensure your agency is well represented at the *2003 Government Performance Summit* by registering your team today!

Sincerely,

Carl D. DeMaio
President
The Performance Institute
Senior Fellow, Reason Foundation

Jonathan D. Breul
Senior Fellow
IBM Endowment for
the Business of Government

www.governmentperformance.org

2003 Agenda at a Glance

Pre-Summit Workshops: Monday, February 24, 2003

7:30 a.m.	Registration and Continental Breakfast
8:30 a.m.	**Workshop A:** Performance-Based Budgeting **Workshop B:** Citizen-Centered e-Government
11:45 a.m.	Lunch
1:00 p.m.	**Workshop C:** Strategic Management of Human Capital **Workshop D:** Improved Financial Management **Workshop E:** Competitive Sourcing
4:00 p.m.	Adjourn

2003 Government Performance Summit

Summit Day One: Tuesday, February 25, 2003

	Implementation Update with Initiative Owner	"Getting to Green" Case Studies	"Town Hall" Dialogue on Challenges and Solutions
7:30 a.m.	Registration, Continental Breakfast and Exhibits		
8:30 a.m.	**Keynote Address:** Status Report Update on Implementation of the President's Management Agenda		
9:30 a.m.	Implementation Update with Initiative Owner: Budget-Performance Integration	"Getting to Green" Case Study: Citizen-Centered e-Government	"Town Hall" Dialogue on Challenges and Solutions: Competitive Sourcing
10:30 a.m.	Break		
10:45 a.m.	Implementation Update with Initiative Owner: Competitive Sourcing	"Getting to Green" Case Study: Improved Financial Management	"Town Hall" Dialogue on Challenges and Solutions: Budget-Performance Integration
12:00 p.m.	**Luncheon Keynote:** Strategic Management of Human Capital: A Progress Report		
1:15 p.m.	Implementation Update with Initiative Owner: Citizen-Centered e-Government	"Getting to Green" Case Study: Budget-Performance Integration	"Town Hall" Dialogue on Challenges and Solutions: Strategic Management of Human Capital
2:15 p.m.	Break		
2:30 p.m.	Implementation Update with Initiative Owner: Improved Financial Management	"Getting to Green" Case Study: Strategic Management of Human Capital	"Town Hall" Dialogue on Challenges and Solutions: Citizen-Centered e-Government
3:30 p.m.	Implementation Update with Initiative Owner: Strategic Management of Human Capital	"Getting to Green" Case Study: Competitive Sourcing	"Town Hall" Dialogue on Challenges and Solutions: Improved Financial Management
4:30 p.m.	Adjourn		

Summit Day Two: Wednesday, February 26, 2003

	Breaking Down Barriers	Implementing New Solutions	Achieving Measurable Success
7:30 a.m.	Registration, Continental Breakfast and Exhibits		
8:30 a.m.	**Legislative Keynote:** Working with Congress on Management Reform—A View from the Chair of the Senate Governmental Affairs Committee		
9:15 a.m.	Aligning the Policy Priorities of Department of Defense Leadership with the Initiatives in the President Management Agenda		
10:30 a.m.	Break		
10:45 a.m.	Integrating the "Management Silos" of the Five PMA Function Areas into a Cohesive Approach to Management Improvement	Implementing the Revised A-76 Guidance to Streamline Competitive Sourcing	Dialogue with Performance Measurement Advisory Council on the Use of Performance Information in the '04 Budget and Beyond
11:45 a.m.	**Luncheon Keynote:** Transitions and Transformations		
1:00 p.m.	Cross-Agency e-Government Coordination	Using New Flexibilities to Implement Homeland Security Personnel Management	Measuring and Evaluating the Impact of PMA Reform Initiatives
2:00 p.m.	Communicating the Management Agenda and Leading Change	Using PART to Evaluate and Improve Program Performance Management	Devising and Integrated, Agency-Wide Performance Measurement System Actually Used by Senior Management
3:00 p.m.	Break		
3:30 p.m.	Including Goals and Measures for PMA Implementation in SES Performance Plans	Implementing Federal Enterprise Architecture for e-Government	Leveraging Success: Communicating Progress and Successes of PMA Initiatives
4:15 p.m.	Feedback from "Town Hall" Dialogues on PMA Challenges		
5:00 p.m.	Adjourn		

2003 Government Performance Summit

Pre-Conference Workshops

Interactive and Comprehensive Training in Each PMA Goal Area

Participants are invited to attend special application workshops the five PMA goals will be discussed in a "training" setting. These interactive workshops provide a comprehensive review of PMA requirements in each goal area, including "standards for success" as identified on the PMA traffic light scorecard. Workshops will also present a methodology for agencies to use in designing, implementing and evaluating initiatives in the PMA area.

Morning Workshops: 8:30-11:45 a.m.

Workshop A: **Budget-Performance Integration**

Linking Resources to Results through Performance Budgeting

- Understand what is meant by "Performance Budgeting" under the revised OMB Circular A-11
- Utilize the Program Assessment Rating Tool (PART)—a scorecard approach used by OMB to review program budget requests and performance achievements
- Devise performance measures using the Government Performance Logic Model—a structured approach to mapping contribution of agency activities to performance results
- Select performance measures for inclusion in program and agency budgets that communicate to various stakeholder groups
- Link cost accounting initiatives with performance budgeting
- Examine different formats of performance budgeting and learn the pros and cons for each

PMA Goal #1: Strategic Management of Human Capital

Criteria for Success:

- ✔ Agency human capital strategy is aligned with mission, goals, and organizational objectives: 1) integrated into Budget and Strategic Plans; 2) consistent with OPM's human capital balanced scorecard (issued by December 1, 2001); and 3) complies with standards for internal accountability systems to ensure effective merit-based HRM.
- ✔ Agency has a citizen-centered organizational structure that is de-layered and oriented toward performing the mission assigned to it.
- ✔ Agency 1) sustains high-performing workforce that is continuously improving in productivity; 2) strategically uses existing personnel flexibilities, tools, and technology; and 3) implements effective succession plans.
- ✔ No skill gaps/deficiencies exist in mission-critical occupations.
- ✔ Agency differentiates between high and low performers through appropriate incentive and rewards.
- ✔ Changes in agency workforce skill mix and organizational structure reflect increased emphasis on e-government and competitive sourcing.

Latest Developments:

- ✔ Homeland Security Act: While this law creates the Homeland Security Department, it contains significant reforms to the civil service system for the entire federal government. It provides a number of new tools for human capital management, including requirements for improved workforce planning, increase in pay caps on SES, elimination of SES recertification requirements, a categorical ranking approach for hiring, new recruitment flexibilities, and creation of Chief Human Capital Officers (CHCO) at each agency.

Workshop B: **Citizen-Centered e-Government**

Creating One-Stop, Cost-Efficient Citizen Services through Technology

- Integrate effective project management with capital planning in order to ensure IT projects are on target, on time and on budget—and to bolster IT budget requests to OMB
- Develop performance measures for information technology projects to align IT investments to mission achievement
- Understand lessons learned in planning, designing, implementing and managing "cross-program" and "cross-agency" e-government initiatives
- Improve the business case for IT investments using OMB Exhibit 300 criteria
- Enhance project management using control and evaluation techniques, ROI/cost-benefit assessments, and risk analysis

Networking Luncheon: 12:00-1:00 p.m.

Afternoon Workshops: 1:00-4:00 p.m.

Workshop C: **Strategic Management of Human Capital**

Recruiting, Retaining and Motivating a Quality Federal Workforce

- Assess workforce needs based on agency strategic plan and project workforce gaps into the future
- Develop "Strategic Human Capital Plans" to identify recruitment, retention, and redeployment goals for your workforce
- Utilize the latest flexibilities for hiring, recruitment, retention and training under the Homeland Security Act
- Cascade program performance goals and measures to the individual level
- Implement OPM guidance on creating individual employee performance plans
- Establish senior executive performance management systems that distinguish and reward outstanding executive performance

Workshop D: **Improved Financial Management**

Providing Timely, Accurate and Useful Financial Information for Decision-Making

- Meet new "accelerated" reporting standards for producing audited financial statements
- Reduce payment errors using "recovery auditing" techniques to identify and recover erroneous payments to vendors and benefit recipients
- Improve calculation of full costs of program activities through Activity-Based Costing (ABC) and other cost allocation techniques
- Produce an integrated "Accountability Report" merging financial and performance information into a single statement of agency fiscal and programmatic health

Workshop E: **Competitive Sourcing**

Achieving "Best Value" and Redesigning Programs Through Competition

- Classify activities as "inherently governmental" or "commercial" under new definitions and "Reason" codes
- Select activities for direct conversion outsourcing and identify opportunities for public-private competitions
- Develop Performance Work Statements (PWS), Most Efficient Organizations (MEO) and Quality Assurance Plans (QASP)
- Achieve "best value" through cost realism and performance evaluation
- Improve accountability for contract performance by employees and vendors alike

Day One: February 25, 2003

✔ Implementation Updates

PMA initiative "owners" from the Office of Management and Budget (OMB) and Office of Personnel Management (OPM) will present a status report on progress in each of the five goal areas as well as detail how the Administration will raise the bar during 2003 for management improvement.

✔ "Town Hall Dialogues" on PMA Challenges and Solutions

Facilitated dialogues will offer the opportunity for peer-to-peer exchange of helpful practices for PMA implementation. Attendees will be able to share ideas, pose questions and identify obstacles in each PMA goal area—with the dialogue captured and presented as part of a "focus group" report.

✔ "Getting to Green" Case Studies

Agencies recognized for PMA progress will present case studies and lessons learned for how to fully implement PMA reforms. Attendees will acquire the latest best practices for implementing PMA initiatives in their programs.

PMA Goal #2: Budget-Performance Integration

Criteria for Success:

- ✔ Integrated planning/evaluation and budget staff work with program managers to create an integrated plan/budget and to monitor and evaluate its implementation.
- ✔ Streamlined, clear, integrated agency plan/budget sets forth outcome goals, output targets, and resources requested in context of past results.
- ✔ Budget accounts, staff, and specifically program/activities are aligned to support achieving program targets.
- ✔ Full budgetary cost is charged to mission accounts and activities. Cost of outputs and programs is integrated with performance in budget requests and execution.
- ✔ Agency has documented program effectiveness. Analyses show how program outputs and policies affect desired outcomes. Agency systematically applies performance to budget and can demonstrate how program results inform budget decisions.

Latest Developments:

- ✔ PART: The Program Assessment Rating Tool is now being used by OMB to evaluate individual program budget requests on the basis of performance and management improvement. 20% of agency programs were scored for FY '04 budget deliberations, with an additional 20% scheduled for the FY '05 budget. Individual program managers government-wide are encouraged to "self-score" their program before formal scoring by OMB occurs.

Agenda and Speaking Faculty

7:30 **Registration and Continental Breakfast**

8:30 ***Keynote Address:*** **Status Report Update on Implementation of the President's Management Agenda**

With the PMA, the Office of Management and Budget has defined and pursued a vigorous management improvement agenda. From policy guidance to agencies to its new "Traffic Light" Management Scorecard, OMB is exercising increased oversight over federal agency management issues. Moreover, as OMB moves into the second year of PMA implementation, expectations are rising. While 2002 witnessed many agencies laying groundwork, the 2003 PMA Scorecard and progress report will uncover what agencies are making actual management improvements…and how. In this kickoff session, hear from Sean O'Keefe, formerly the deputy director of OMB and now the administrator of NASA, about the government-wide implementation of the PMA.



Hon. Sean O'Keefe
Administrator
National Aeronautics and Space Administration

9:30 ***Track A:*** **Implementation Update with Initiative Owner**
Budget-Performance Integration

- Chart agency progress to link resources to results through the budget process
- Evaluate the impact of PART on budget requests and allocations
- Understand OMB expectations for the use of performance in resource allocation decisions
- Questions and answers with OMB initiative "owner"

Marcus Peacock
Associate Director
Office of Management and Budget

Track B: **Getting to Green Case Study**
Citizen-Centered e-Government

- Lessons in utilizing technology to its fullest to provide services and information that is centered around the citizen
- Establish techniques on how to meet and exceed citizen expectations through the use of technology
- Plan and justify agency IT requests on the basis of performance

Pat Pizzella
Chief Information Officer and Asst. Secretary for Administration and Management
Department of Labor

Laura Callahan
Deputy Chief Information Officer
Department of Labor

Track C: **Town Hall Dialogue on Challenges and Solutions**
Competitive Sourcing

Participate in and provide your thoughts and suggestions on implementing the federal government's new competitive sourcing process. This session is your opportunity to voice concerns, raise questions, suggest solutions, and exchange ideas with your colleagues from across the federal government on this key PMA goal. Don't be worried if a number of key senior government leaders sit in to hear the dialogue—the ground rules for this session stipulate all comments are "on background" only without attribution.

Moderator:
Carl D. DeMaio
President
The Performance Institute



Panelists:
YOU…*and your competitive sourcing colleagues from other federal agencies.*

NOTE: This session will be transcribed, with comments appearing without attribution in a government-wide report titled "The President's Management Agenda: Feedback from the Field on Competitive Sourcing."

10:30 **Break**

10:45 ***Track A:*** **Implementation Update with Initiative Owner**
Competitive Sourcing

- Learn how OMB plans to implement the new changes to OMB Circular A-76 and ensure agency compliance with a new 12 month time limit on competitions
- Gain an understanding of the future of competitive sourcing and its implications for your agency
- Implement the new roles and responsibilities of the revised A-76 into your competitive sourcing plan
- Questions and answers with an OMB initiative "owner"

Jack Kalavritinos
Associate Administrator for Competitive Sourcing
Office of Management and Budget

Track B: Getting to Green Case Study
Improved Financial Management

- Accelerate reporting of agency financial information
- Provide relevant, timely, accurate and useful cost information on agency programs
- Reduce payment errors and create successful payment indicators to ensure fiscal accuracy
- Evaluate establishment of department-wide financial systems that integrate detailed cost information and enhanced reporting capabilities

Deborah Schilling
Budget Director
General Services Administration

Track C: Town Hall Dialogue on Challenges and Solutions
Budget-Performance Integration

Participate in and provide your thoughts and suggestions on making all federal program budget requests truly "performance-based." This session is your opportunity to voice concerns, raise questions, suggest solutions, and exchange ideas with your colleagues from across the federal government on this key PMA goal. Don't be worried if a number of key senior government leaders sit in to hear the dialogue—the ground rules for this session stipulate all comments are "on background" only without attribution.

Moderator:



Jonathan Breul
Senior Fellow
IBM Endowment for the Business of Government

Panelists:
YOU…*and your budget and program colleagues from other federal agencies.*

NOTE: This session will be transcribed, with comments appearing without attribution in a government-wide report titled "The President's Management Agenda: Feedback from the Field on Budget-Performance Integration."

PMA Goal #3: Improved Financial Management

Criteria for Success:

- ✔ Financial management systems meet federal financial management system requirements and applicable federal accounting and transaction standards as reported by the agency head.
- ✔ Accurate and timely financial information.
- ✔ Integrated financial and performance management systems supporting day-to-day operations.
- ✔ Unqualified and timely audit opinion on the annual financial statements; no material internal control weaknesses reported by the auditors.

Latest Developments:

- ✔ Accelerated Reporting: OMB is requiring all agencies to move up the date by which their financial statements are finalized and released, with a goal of producing financial statements within six weeks of the end of the fiscal year.
- ✔ Government Waste Corrections Act: This groundbreaking legislation requires all agencies to implement "recovery auditing" practices to identify and reduce erroneous payments.
- ✔ Revised OMB Circular A-76: Only agencies that have cost accounting information certified and accepted by OMB can use internal cost data in competitive sourcing; all others must follow the guidance in the A-76 supplement for achieving "cost realism" in agency cost estimates.

12:00 **Luncheon Keynote:** Strategic Management of Human Capital:
A Progress Report

Strategic Management of Human Capital was one of the PMA areas that desperately needed improvement just one year ago. HR processes were in disarray—agencies were not recruiting based on need, few processes were automated, and the thought of a forthcoming "human capital crisis" loomed in the minds of HR managers government-wide. In one year's time, government agencies have made excellent progress, as proven by the fact that nearly 75% of agencies have received a "Green Light" on progress for implementation of their human capital strategies. Listen to the Director of the Office of Personnel Management discuss the tremendous strides that have been made in this critical area.



Hon. Kay Coles James
Director
Office of Personnel Management

1:15 ***Track A:*** Implementation Update with Initiative Owner
Citizen-Centered e-Government

- Examine progress of the 24 e-Gov Initiatives with lessons learned and recommendations on where improvement is needed
- Ensure your IT business case submitted meets OMB capital planning, risk management and performance measurement requirements
- Learn OMB progress on the development of Federal Enterprise Architecture (FEA) and use of the government-wide e-gov business processes
- Questions and answers with the OMB initiative "owner"

Dan Chenok
Branch Chief for Information Policy and Technology
Office of Management and Budget

Track B: Getting to Green Case Study
Budget-Performance Integration

- Create streamlined annual performance plans detailing relationship between specific budget requests and program outputs
- Forge and maintain a performance-based culture between planning and budget offices
- Use Activity-Based Costing to correlate costs of activities to performance achievements
- Improve presentation of the budget using PART analysis and performance measurements

Nina Hatfield
Deputy Assistant Secretary
Department of the Interior

Track C: Town Hall Dialogue on Challenges and Solutions
Strategic Management of Human Capital

Participate in and provide your thoughts and suggestions on ensuring each federal agency can recruit, retain and motivate a quality workforce. This session is your opportunity to voice concerns, raise questions, suggest solutions, and exchange ideas with your colleagues from across the federal government on this key PMA goal. Don't be worried if a number of key senior government leaders sit in to hear the dialogue—the ground rules for this session stipulate all comments are "on background" only without attribution.

Moderator:



John Palguta
Vice President
Partnership for Public Service

Panelists:
YOU…*and your human resource management colleagues from other federal agencies.*

NOTE: This session will be transcribed, with comments appearing without attribution in a government-wide report titled "The President's Management Agenda: Feedback from the Field on Strategic Management of Human Capital."

2:15 **Break**

2:30 **Track A: Implementation Update with Initiative Owner**
Improved Financial Management

- Examine the success of agencies in meeting Presidential initiatives in Financial Management
- Improve strategies to reduce erroneous payments and provide timely financial information
- Ensure that agencies have all tools necessary to meet demands for accelerated financial reporting in FY '04 budget and beyond
- Questions and answers from the OMB initiative "owner"

Joe Kull
Deputy Controller
Office of Management and Budget

Track B: Getting to Green Case Study
Strategic Management of Human Capital

- Align your agency's human capital strategy with mission, goals, and organizational objectives
- Ensure that no skill gaps/deficiencies exist in mission critical occupations
- Learn how to implement effective succession plans through assessing current employees and identifying potential leaders

Reginald Wells
Deputy Commissioner for Human Resources
Social Security Administration

Track C: Town Hall Dialogue on Challenges and Solutions
Citizen-Centered e-Government

Participate in and provide your thoughts and suggestions on harnessing the power of information technology to improve citizen service in government. This session is your opportunity to voice concerns, raise questions, suggest solutions, and exchange ideas with your colleagues from across the federal government on this key PMA goal. Don't be worried if a number of key senior government leaders sit in to hear the dialogue—the ground rules for this session stipulate all comments are "on background" only without attribution.

Moderator:
David McClure
Vice President for e-Government
Council for Excellence in Government



Panelists:
YOU…*and your information technology colleagues from other federal agencies.*

NOTE: This session will be transcribed, with comments appearing without attribution in a government-wide report titled "The President's Management Agenda: Feedback from the Field on Citizen-Centered e-Government."

3:30 **Track A: Implementation Update with Initiative Owner**
Strategic Management of Human Capital

- Establish timelines and benchmarks for improved performance of the organization's work and measures the organization's performance against those benchmarks
- Identify short and long-term strategies for addressing skill gaps with goals for closing immediate and projected skill gaps
- Track the progression of other key agencies in regards to strategic management of human capital, and take away important best practices and lessons learned

Marta Perez
Project Director for Human Capital Performance
Office of Personnel Management

Track B: Getting to Green Case Study
Competitive Sourcing

- Obtain proven strategies from agency experts how to stay in compliance with the PMA
- Learn how to implement the necessary steps to move your agency from Red to Green
- Conduct competitions and direct conversions pursuant an approved competitive sourcing plan

David Drabkin
Deputy Associate Administrator for Acquisition Policy
General Services Administration

PMA Goal #4: Citizen-Centered e-Government

Criteria for Success:

- ✔ **Strategic Value: all major systems investments have a business case that meets the requirements of OMB Circular A-11 (Exhibit 53,Form 300).**
- ✔ **IT Program Performance: On average, all major IT projects operating within 90 percent of Form 300 cost, schedule, and performance targets.**
- ✔ **Citizen one-stop service delivery integrated through Firstgov.gov, cross-agency call centers, and offices or service centers.**
- ✔ **Minimize burden on business by re-using data previously collected or using XML or other open standards to receive transmissions.**
- ✔ **Intergovernmental: Deploying e-grants or Geospatial Information one-stop.**
- ✔ **Obtaining productivity improvements by implementing customer relationship management, supply chain management, enterprise resource management, or knowledge management best practices.**

Latest Developments:

- ✔ **e-Government Act of 2002: The most groundbreaking IT legislation since Clinger-Cohen, the e-Gov Act provides for additional funding and new standards for government IT initiatives. The law provides for IT workforce incentives, privacy and security standards, web content guidelines, and new IT procurement vehicles such as "share-in-savings" contracts.**
- ✔ **Federal Enterprise Architecture: To be piloted first at the Dept. of Homeland Security, the new FEA will be implemented government-wide during 2003 and beyond—providing for more consistency and integration in government-wide IT.**
- ✔ **24 Presidential e-Gov Initiatives: Launched in 2002, these 24 initiatives require substantial cross-agency collaboration and provide historic "one-stop" services to citizens. Look for expansion of these initiatives in 2003 and beyond.**
- ✔ **OMB Circular A-76: Recognizing the important role of partnerships in e-government, revised competitive sourcing guidance provides for streamlined outsourcing of IT initiatives.**

Track C: Town Hall Dialogue on Challenges and Solutions
Improved Financial Management

Participate in and provide your thoughts and suggestions on improving the financial management systems for all federal agencies. This session is your opportunity to voice concerns, raise questions, suggest solutions, and exchange ideas with your colleagues from across the federal government on this key PMA goal. Don't be worried if a number of key senior government leaders sit in to hear the dialogue—the ground rules for this session stipulate all comments are "on background" only without attribution.

Moderator:
Karen Alderman
Executive Director
Joint Financial Management Improvement Program



Panelists:
YOU…*and your financial management colleagues from other federal agencies.*

NOTE: This session will be transcribed, with comments appearing without attribution in a government-wide report titled "The President's Management Agenda: Feedback from the Field on Improved Financial Management."

4:30 **Adjourn**

Day Two: February 26, 2003

✔ Breaking Down Barriers

Overcome resistance to management changes and build synergy across the traditionally "silo-ed" management functions of federal agencies. Sessions will present ways each PMA goal can leverage and be integrated with the other four goals in a coordinated, comprehensive management system.

✔ Implementing New Solutions

New civil service flexibilities in the Homeland Security Act, new standards from the e-Government Act of 2002, and a reformed A-76 competitive sourcing process will be detailed and discussed so all agencies can begin implementing these new management solutions.

✔ Achieving Measurable Success

Management and policy unite to achieve measurable success. Sessions will provide a perspective on how to integrate policy agendas with the PMA in each Department, as well as produce some clear "success stories" by mid-2004 in each agency to ensure PMA momentum can be sustained.

Agenda and Speaking Faculty

7:30 **Continental Breakfast**

8:30 ***Legislative Keynote Address:*** **Working with Congress on Management Reform**

A View from the Chair of the Senate Governmental Affairs Committee

Efforts to improve government performance will require cooperation between both the executive and legislative branches. Senator Susan Collins assumes Chairmanship of the Senate Governmental Affairs Committee for the 108th Congress. A former committee staff member, Senator Collins has an outstanding command of federal management improvement issues and will play a key role in shaping efforts to improve government performance. In this keynote session, hear from one of the key Congressional leaders in federal management improvement what role Congress can play in the coming years.



Senator Susan Collins (R-ME)
Chair
Senate Governmental Affairs Committee

*Invited

9:15 ***DoD on the PMA:*** **Aligning the Policy Priorities of DoD Leadership with the Initiatives in the President Management Agenda**

As the Department of Defense marches into the 21st century, it is examining many department-wide enforcement priorities. With the implementation of the President's Management Agenda, DoD has been able to align its policy priorities with the five initiatives of the PMA, including in the area of Strategic Management of Human Capital. The world has changed so dynamically that the DoD needs a an adaptive workforce more than ever and with the creation of a new Human Resource Strategy, it has tackled one of its main policy initiatives and successfully implemented the PMA into its management structure.



Hon. David Chu
Under Secretary for Personnel and Readiness
U.S. Department of Defense

10:30 **Break**

10:45 ***Track A:*** **Breaking Down Barriers**

Integrating the "Management Silos" of the Five PMA Function Areas into a Cohesive Approach to Management Improvement

- Develop strategies to integrate all five components of PMA to ensure synergy and coordination of the management improvement efforts
- Maintain open lines of communication between key management functions of the agency to ensure integration of agenda initiatives
- Abandon "stovepipe" management and craft performance measures along a cohesive management structure

Norma Campbell
Director, Performance Management
Department of the Interior

Track B: **Implementing New Solutions**

Implementing the Revised A-76 Guidance to Streamline Competitive Sourcing

- Use new criteria and standards to evaluate for "Best Value" and "Cost Realism"
- Navigate through new mandates and time limits for managed competition
- Prepare agency staff for new roles and responsibilities under the new A-76
- Learn about new competition vehicles under FAR processes

Michael Del Colle
Formerly of the Department of the Interior

Adrian Moore
Executive Director
Reason Public Policy Institute

Track C: **Achieving Measurable Results**

Dialogue with Performance Measurement Advisory Council on the Use of Performance Information in the '04 Budget and Beyond

Performance information will have a huge impact in the '04 Budget, and every budget cycle thereafter. Due to new mandates such as PART, performance assessments will now play a major role in budget allocations. The PMAC will discuss new ways of providing information to agencies as well as addressing the importance of PART to the final budget.

Mort Downey
President's Management Advisory Council

Bill Eggers
President's Management Advisory Council

11:45 ***Luncheon Keynote:*** **Transitions and Transformations**

Government is on a "burning platform," and the status-quo way of doing business has become unacceptable because of rising citizen expectations for results and response, demands on resources due to terrorism, fiscal trends and poor human capital strategies. Listen as the GAO comptroller general describes how government can overcome those challenges and effect positive changes within departments and agencies.



David Walker
Comptroller General
General Accounting Office

1:00 ***Track A:*** **Breaking Down Barriers**

Cross-Agency e-Government Coordination

- Demonstrate tangible improvements in the development of cross-agency and inter-governmental partnerships
- Utilize specific strategies for effective communication with citizens, state and local governments, private industry, academia, and other federal agencies to coordinate efforts among program partners
- Integrate e-Gov projects that are duplicative and allow citizens to have "one-stop" point of service

Jim Van Wert
Director, e-Government
Small Business Administration

Track B: **Implementing New Solutions**

Using New Human Capital Flexibilities in the Homeland Security Act

- Learn how OPM is helping federal agencies chart their own course through new flexibilities for innovation in personnel management
- Understand how the new rules will allow agencies to use "categorical ranking," which will speed up the hiring process and improve the quality of candidates

- Utilize new recruitment and retention flexibilities to better achieve workforce management

Ron Sanders
Associate Director for Human Resources Program Development
Office of Personnel Management

Track C: Achieving Measurable Results
Measuring and Evaluating the Impact of PMA Reform Initiatives

- Develop goal-specific measurements to track success of PMA initiatives
- Assess the implementation of PMA initiatives through agency-wide measurements and progress reports
- Ensure accountability for results under the PMA

Angela Antonelli
Chief Financial Officer
Department of Housing and Urban Development

2:00 ### *Track A:* Breaking Down Barriers
Communicating the Management Agenda and Leading Change

- Develop a clear, concise mission to implement the PMA agency-wide
- Identify ways to train and motivate staff to focus on and implement PMA reforms
- Utilize internal communication strategies to update workforce on PMA mandates and to establish employee role in PMA implementation

Michael A. Muñoz
Deputy Assistant Secretary for Performance Improvement
Department of Education

Track B: Implementing New Solutions
Using the PART to Evaluate and Improve Program Performance Management

- Apply PART to agency programs to align program performance with budget requests
- Discuss the four components of PART and learn how to ensure that your program and management are working toward the same goals
- Develop intermediate outcomes and end outcomes for your program to ensure compliance

Carl D. DeMaio
President
The Performance Institute

Track C: Achieving Measurable Results
Devising and Integrated, Agency-Wide Performance Measurement System Actually Used by Senior Management

- Identify key expectations of senior management for program information
- Provide performance information in a relevant, timely, and useful format to agency senior management
- Review progress of agency management initiatives on a systematic basis to enhance accountability

Scott Cameron
Deputy Assistant Secretary for Performance Management
Department of the Interior

3:00 ### Break

3:15 ### *Track A:* Breaking Down Barriers
Including Goals and Measures for PMA Implementation in SES Performance Plans

- Acquire successful strategies for evaluating and appraising the performance of senior managers
- Ensure that senior managers are being evaluated with strict accordance to the goals and measures set forth in the agency strategic plan
- Develop an objective methodology for gauging the relative performance of senior managers

Evelyn White
Deputy Assistant Secretary for Administration and Management
Department of Health and Human Services

Track B: Implementing New Solutions
Using Provisions of the 2002 e-Government Act to Implement the PMA

- Understand how privacy impact assessments and security standards are an integral part of maintaining effective IT systems
- Devise strategies for procuring money from the newly founded "e-Government Fund," which will allocate $345 million to e-Government projects each year
- Incorporate innovative procurement methods such as share-in-savings and cooperative purchasing

Edward Roback
Computer Security Division Chief
National Institute of Standards and Technology

Track C: Achieving Measurable Results
Leveraging Success: Communicating Progress and Successes of PMA Initiatives

- Keeping internal staff motivated by providing evidence of internal improvements
- Maintain an open external discourse regarding PMA scorecard and agency improvement
- Identify key "success stories" of management improvement to provide to external stakeholders

Katherine Gugulis
Deputy Chief of Strategic Planning and Accountability
Natural Resources Conservation Service/USDA

4:15 ### Feedback from Town Hall Dialogues on PMA Challenges

Taking the key points surfaced during the "Town Hall Dialogues" on day one of the conference, this session will provide an integration and summary of the major lessons learned thus far in the implementation of the President's Management Agenda. As key themes from each Town Hall are reviewed, commentary from the audience and an expert panel will provide ideas for "next steps" for implementing the PMA in 2003 and beyond.

Moderator:
Mary Hamilton
President
American Society of Public Administration

Panelists:
Carl D. DeMaio
President
The Performance Institute
Barry White
Director for Government Performance
Council for Excellence in Government

5:00 ### Adjourn

PMA Goal #5: Competitive Sourcing

Criteria for Success:

- ✔ Completed public-private or direct conversion competition on not less than 50 percent of the full-time equivalent employees listed on the approved FAIR Act inventories.
- ✔ Competitions and direct conversions conducted pursuant to approved competition plan.
- ✔ Commercial reimbursable support service arrangements between agencies are competed with the private sector on a recurring basis.

Latest Developments:

- ✔ Revised OMB Circular A-76: The most significant rewrite of competitive sourcing guidance since the Circular was first created, the revised A-76 emphasizes the principles of accountability, competition, transparency and performance. Under the new process, agencies must complete competitions within 12 months of initiation. In addition, agencies can choose from a number of competition processes, including a one-step "integrated" competition for IT services. Borrowing heavily from the principles of the FAR, under the new competitive sourcing process, bids must be reviewed using "best value" criteria where performance standards and realistic cost estimates are evaluated.

2003 Government Performance Summit

Research Reports



Designing a Performance-Based Competitive Sourcing Process for the Federal Government

Released October 8, 2002

This report presents 37 of the most feasible and often-suggested ideas generated during the research project. The 37 recommendations require some form of action by federal agencies, the Administration and/or Congress, and provide for substantial change to the existing competitive sourcing process.

Creating a Performance-Based Electronic Government

Released October 30, 2002



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

Cultivating High-Performance Senior Executives in Government

Released in January 2003



With the support of Reason Foundation and Senior Executives Association, The Performance Institute will release a report focused on the implementation of the current OPM guidelines for the Senior Executive Service (SES). The report will include a state-of-the-practice of the SES in federal government and recommendations for implementing performance criteria into SES performance plans and evaluations. Through a chapter on lessons learned and themes from an SES "Town Hall" dialogue hosted in October 2002 at The Performance Institute, along with a chapter outlining four performance criteria, the report will present a framework for developing and implementing agency and position critical outcome-oriented performance measures for SES performance plans and evaluations.

Implementing and Measuring Innovative Recruitment Strategies in Government

Expected Release in February 2003



Coinciding with the 2003 Government Performance Summit, the Performance Institute will release a comprehensive report cataloguing the recruitment initiatives being managed by federal agencies and assessing their relative success in attracting quality employees to federal government service. The project will survey all federal agencies to identify the most innovative recruitment initiatives, examine common lessons learned, review measures of performance, and evaluate overall recruitment success. A thorough set of recommendations on the usage of performance measures and indicators will be presented in the report, which will be available at the Summit.

Performance Budgeting in Government

Expected Release in May 2003



The Performance Institute will study the use of performance information in the budget process by appropriators and OMB examiners as they make allocation and funding decisions. We will interview Congressional appropriators on "background" and then present their candid views of performance so that agency budget officers can best present their budget justifications. An exchange of ideas between legislators, analysts and program managers can make the entire budget process more efficient and effective. At the 2003 Government Performance Summit, research staff will administer a survey and solicit feedback on the initial outline of the report.

Cost Accounting Innovations in Government

Expected Release in May 2003



The Performance Institute will examine the different approaches agencies take when calculating full costs of service. Activity-Based Costing will be closely studied, in addition to other innovative approaches to cost accounting in government. At the 2003 Government Performance Summit, research staff will administer a survey and solicit feedback on the initial outline of the report.

In-House Training on the President's Management Agenda

If you are unable to attend the Government Performance Summit in 2003, there are still ways to access the latest news and best practices on the President's Management Agenda. Workshops offered on Day One are available on an "in-house" basis for all federal agencies.

One, two and three-day PMA education programs are available to federal agencies for in-house training of staff in the following areas:

- ✔ PMA Overview: The Five Goals
- ✔ Budget-Performance Integration: Performance Budgeting
- ✔ Performance Measurement Using the Logic Model
- ✔ Implementing OMB's PART for Budget Justifications
- ✔ Activity-based Costing: Step-by-Step
- ✔ Performance-based Contracting
- ✔ Workforce Assessments and Human Capital Planning
- ✔ Strategic Recruitment and Retention
- ✔ SES and Line Manager Performance Plans
- ✔ IT Performance Measurements
- ✔ IT Security and Privacy Assessments and Standards
- ✔ e-Government Initiatives: Planning, Design and Budget Justification
- ✔ Improved Financial Management: Reducing Payment Errors
- ✔ Competitive Sourcing: The New A-76 Process

In-house training provides for customized, cost-efficient ways to educate staff on the requirements, best practices, and proven strategies for implementing the PMA. It also provides an excellent forum for team building and project planning. Training is conducted by seasoned experts in each of the five PMA goal areas. When possible, actual example "projects" from the host agency are used during the training program—providing real life examples for agency staff. For more information on in-house training options, contact Felipe Monroig at 703-894-0481.

Coalition

The 2003 Government Performance Summit is supported by an impressive coalition of organizations dedicated to the improvement of government management.

The Performance Institute is a private Washington-based think tank whose mission is dedicated to studying and improving the performance of government agencies. PI actively analyzes best management practices for dealing with emerging public policy issues, bringing government leaders and managers together to jointly explore common management challenges. We use four vehicles to that: conferences like the Government Performance Summit, training seminars, research projects, and consulting.

The Council for Excellence in Government works to improve the performance of government at all levels; and government's place in the lives and esteem of American citizens. With its experienced staff, network of experts and members, and diverse partners, the Council helps to create stronger public sector leadership and management, driven by innovation and focused on results; and increased citizen confidence and participation in government, through better understanding of government.

Reason Foundation is a public policy think tank promoting choice, competition, and a dynamic market economy as the foundation for human dignity and progress. Reason produces rigorous, peer-reviewed research and directly engages the policy process, seeking strategies that emphasize cooperation, flexibility, local knowledge, and results.

National Academy of Public Administration is the preeminent organization dedicated to improving the performance of governance systems-the network of public institutions, nonprofit organizations, and private companies that share in the implementation of public policy. As an independent, nonprofit organization chartered by Congress, the Academy responds to specific requests from public agencies and non-government organizations.

American Society for Public Administration
With a diverse membership of more than 10,000 government and nonprofit administrators, scholars, teachers and students, ASPA is the largest and most prominent professional association in public administration.

Partnership for Public Service was formed in early 2002 as a non-partisan organization dedicated to revitalizing public service. The Partnership seeks to restore public confidence in and prestige to the federal civil service through an aggressive campaign of public-private partnerships as well as focused research and educational efforts.

The George Washington University Department of Public Administration is one of the preeminent public administration programs in the nation, having graduated thousands of students into public service.

Institute for the Study of Public Policy Implementation at American University The function of the Institute for the Study of Public Policy Implementation is to create a non-partisan forum for stakeholders in the public policy implementation system (members of Congress, political appointees, career government executives, mid-level manager association leaders, union leaders, academics, and the consulting and technology community).

Coalition for Effective Change (CEC) was formed in 1993 as a non-partisan alliance of associations representing current and retired federal managers, executives, and professionals. CEC provides a channel for these public employees to contribute to the success of reinventing government. CEC meets with the Director of the office of Personnel Management (OPM) to discuss efforts to improve government.

Senior Executives Association (SEA) was founded in 1980 as a tax-exempt, nonprofit corporation representing career federal executives. Our membership is committed to effective, efficient and productive leadership in government. SEA seeks to ensure equitable treatment and compensation, continuing professional education, and recognition for the more than 7,000 career federal executives who comprise the nation's highest civil service ranks.

The Heritage Foundation Founded in 1973, The Heritage Foundation is a research and educational institute — a think tank — whose mission is to formulate and promote conservative public policies based on the principles of free enterprise, limited government, individual freedom, traditional American values, and a strong national defense.

Summit Details

Venue

The Kellogg Conference Center on the Washington, D.C. campus of Gallaudet University is a full-service hotel and conferencing facility, boasting state-of-the-art multimedia support for guests who must stay in contact with their offices.

Kellogg Conference Center
Gallaudet University
800 Florida Ave., N.E.
Washington, D.C. 20002
202-651-6000
www.gukcc.com

Tuition

The tuition rates for attending the *2003 Government Performance Summit* are:

	Private Sector	Public Sector	Group Rate
Summit only:	$1195	$995	$795
Workshop (each):	$500	$300	$300

Group Discounts

The Performance Institute offers reduced tuition to groups of three or more starting at $795. If you think your colleagues would benefit from attending this year's Summit, call Blake Zach at 703-894-0481 or send him an e-mail at zach@performanceweb.org.

Administrative Notes

A 10 percent cancellation fee on the total tuition will be charged for cancellations received less than three weeks from the date of the Summit. As speakers are confirmed six months before the event, some session and speaker changes may occur.

www.governmentperformance.org

- ✔ Expanded workshop descriptions
- ✔ Stay current on PMA developments
- ✔ View speaker biographies
- ✔ Receive Summit updates
- ✔ Access research reports



PMA e-Newsletter

More than 10,000 government employees and private citizens receive the Performance Institute's monthly PMA Update e-newsletter in their inboxes. This free service provides readers with the latest news, research and analysis of the President's Management Agenda. To subscribe, send an e-mail to vincent@performanceweb.org or visit www.governmentperformance.org.



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

Registration Form for the *2003 Government Performance Summit* Call (703) 894-0481; Fax This Form To: (703) 894-0482; or visit **www.governmentperformance.org**

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