3 Proven Ways to Build a Better IT Business Case!

Dear Government IT Professional:

OMB Raises the Bar on IT Budget Justifications: Are you ready?

Ever since the Bush Administration took office, the red pens of OMB have been working overtime on their Exhibit 300 reviews. Last year, less than twenty percent of the programs that submitted Exhibit 300s were successful on their first attempt.

In 2003, OMB has changed their Performance Reference Model, Business Reference Model, and Exhibit 300 requirements. These tools are used to justify expenditure and link programs and projects to overall mission. It is vitally important for your agency to stay on top of these changes to achieve full funding for your projects.

Option 1: Interactive Training on New OMB IT Business Case Guidance

To help you meet the challenges of understanding and meeting OMB's requirements for the Exhibit 300, the Performance Institute is pleased to sponsor publicly offered sessions on *Developing a Better Business Case*. These two-day events are open to all agencies. Everyone who attends will hear from OMB regarding exactly how and why business cases need to be done. These events will showcase best practices in completing a successful Exhibit 300 and developing performance measures.

Additionally, these sessions will provide all attendees with several new tools (The Government Performance Logic Model and an innovative portfolio management tool to simplify the Exhibit 300 process) that will greatly increase your ability to score a 4 or 5 on your Exhibit 300s.

Option 2: One-Hour Consultation on Your IT Business Case by Expert Reviewer

The government-wide need for one-on-one feedback on Exhibit 300s and IT budget justifications has prompted the Institute to offer free one-hour consultations to those agencies that are unsure how much work their business cases need. Expert evaluators will come to your agency and walk through one of your current Exhibit 300s, providing you with recommendations on how to improve your business cases.

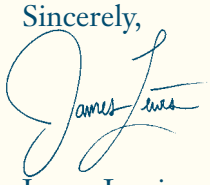
These briefings are an opportunity to discuss emerging best practices related to performance management, definition and tracking of measures, and realization of performance improvements and cost efficiencies. Representatives of the research coalition will also offer a preview of the plans for next year's report and welcome input from the agency leaders on how best to capture their performance-based e-government experiences.

Option 3: In-House Facilitated "Application" Session Using an Actual IT Project

Most agencies prefer to have a customized, in-house session to walk through the new IT budget justification guidance using one of their own examples. In-house training provides a customized, cost-efficient method to educate staff on the correct completion of a successful business case. Training is conducted by seasoned experts in business cases and the Exhibit 300 process. Wherever possible, actual projects from the client agency are used during the training program – providing real life examples for agency staff.

Business cases and integrated performance measures are becoming more and more important to government appropriators. I look forward to being able to help you succeed in your struggle with getting your business cases aligned with OMB's requirements.

Sincerely,



James Lewis
Director, E-Government

Get an Inside Track on OMB Guidance and IT Business Case Review Criteria!

Stay Off OMB's IT "High Risk" List!

Building Better IT Business Cases *in Government*

Interactive Step-by-Step Construction of Exhibit 300s and IT Budget Justifications Using Latest OMB Guidance & Performance Management Tools

Presented by:

The Performance Institute

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

Option 1: Publicly Offered Training Forums:

Dates Offered: July 14–15 and August 25–26

Tuition Rates: Early Rate $995 Regular Rate $1095

Group discounts are available for groups of 3 or more. Contact James Lewis for more information about the discounts at 703-894-0481 x 207 or lewis@performanceweb.org.

It is highly recommended that each attendee bring a copy of one of the current business cases that they are working on to the training. Doing so provides real life examples for attendees.

Option 2: Free One-Hour Review of Your Business Case:

The government-wide need for training on the Exhibit 300 has inspired us to offer free one-hour consultations to those agencies who are not sure how much work their business cases need. Expert evaluators will come to your agency and walk through one of your current Exhibit 300s, providing recommendations on how to improve your business cases.

Option 3: In-House Training:

In-house training provides a customized, cost-efficient vehicle for educating your staff with a hands-on, educational forum that facilitates team-building and project-planning. Instead of making the training match with "cookie-cutter" training, our in-house offerings are matched to the specific needs of your agency.

To schedule your free briefing or find out more about in-house training, please call James Lewis at 703-894-0481 or e-mail Lewis@performanceweb.org.

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Stay Off OMB's IT "High Risk" List!

Building Better IT Business Cases *in Government*

Interactive Step-by-Step Construction of Exhibit 300s and IT Budget Justifications Using Latest OMB Guidance & Performance Management Tools



Presented by:

The Performance Institute

IT Business Case Reviews & Consultations

Expert feedback on your existing business case from evaluators with a mastery of OMB guidance and IT justifications

Training in OMB Business Case Guidance

Hands-on instruction in applying a framework for developing and refining an IT business case and budget justification

Facilitate Construction of IT Business Cases

In-house facilitation and walk-through of the development of a business case using a project selected by your agency

Guaranteed to Simplify and Enhance the Planning, Funding and Management of Your IT Projects!

Use the Performance Reference Model—and a New Business Case Tool—to Ensure Your IT Budget Justifications Win OMB Approval!

Guaranteed to Meet All Components of a Successful Exhibit 300 (Capital Asset Plan and Business Case)

1. Program Management
2. Enterprise Architecture
3. Alternatives Analysis
4. Risk Management
5. Performance Goals
6. Security
7. Performance Based Management System (PB)
8. Life Cycle Costs Formulation (LC)
9. Supports the President's Management Agenda

$21 Billion worth of IT projects failed OMB's recent budget review. Your agency MUST prepare for the rising expectations and increased scrutiny of its IT business cases!

"750 or so projects will not be continued unless they can correct their shortcomings by the next fiscal year, which begins Oct. 1st. Several hundred projects are failing because of poor project management."

Mark Forman, Administrator for the Office of e-Government and IT within the Office of Management and Budget

Public-Offered Forums

Building a Better IT Business Case

Hands-on instruction in applying a framework for developing and refining an IT business case and budget justification

July 14 – 15 Arlington, VA
August 25 – 26 Arlington, VA

Location:

Performance Institute
1515 N. Courthouse Road
6th Floor
(Courthouse Metro)
Arlington, VA 22201

(In-house sessions also available)

Who Should Attend?

Any government employee that is required to work with OMB Circular A-11 Exhibit 300s, including:

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

Day 1 - Introduction and Expectations

8:00 a.m. – 9:00 a.m.

The Performance Institute will kick-off the session with an introduction to OMB Circular A-11 and exhibit 300s: including the purpose of building business cases, who/when must submit, etc. Discussions will be held with the group to determine their current levels of understanding, particular issues/areas of interest and their expectations from the course.

Instruction and Discussions
9:00 a.m. – 4:00 p.m.

Introduction and Update on OMB Directives and Developments

- President's Management Agenda
- Citizen-Centered e-Government

Starting the Exhibit 300 Process

A review of the instructions and the breakdown of the exhibit. Overview of sources and materials needed to ensure satisfactory completion an Exhibit 300, including:

- NIST Security Assessment Results
- Enterprise Architecture.
- Agency Strategic Plan
- Agency Strategic IT Plan (if published)
- Project and Funding Plans
- GPEA Plan
- OMB Documentation and Guidance

Content Session: General Overview of All elements in Part I and Part II

Part I

- Project Description
- Justification
- Performance Goals and Measures
- Program Management
- Alternatives Analysis
- Risk Inventory and Assessment
- Acquisition Strategy
- Project and Funding Plan

**** LUNCH BREAK****

Part II

- Enterprise Architecture
- Security and Privacy
- Government Paperwork Reduction Act

Review of Prior Successes and Best Practice Business Cases

An example of a successful Exhibit 300 will be analyzed so that course attendees can see what a successful Exhibit 300 contains.

OMB Proposed Changes for FY 05

OMB is making several changes to the Exhibit 300 form this year. In order to achieve a score of 4 or 5 on Exhibit 300 submissions, agencies must learn about how to handle these new expectations.

Day 2 – Instruction and Discussions

9:00 a.m. – 12:00 p.m.

This training will focus on providing the information and understanding needed to successfully understand IT Performance Measures and Risk Management. This component of the course includes topics such as:

An Introduction to the Performance Logic Model

The Logic Model is the methodology used by the Performance Institute to demonstrate how IT programs and initiatives are used to support specific program goals and the overall goals of HUD

Performance Measures as a Strategic Tool for Government IT

- Why performance measures are important to government IT initiatives

Designing and Using Performance Measurements for IT Initiatives

- Alignment to Agency Performance Measures
- Measuring Cost Efficiencies and Program Performance Improvements
- Establishing a Measurement and Benchmark System for IT Functions
- Collecting, Reporting and Managing Performance Information
- Enhancing IT Success and Keeping IT Programs on Target, on Time, and on Budget with Performance Measurement and Risk Management

Model Performance Measures and IT Risk Management

- Architecture and Standards Management
- Applications and Services Management
- IT Workforce Management
- Information Management
- Financial and Administrative Management
- E-Commerce and Emerging Technologies
- Customer and End-User
- Risk Assessment and Evaluation
- Linking Performance Measures and Risk Assessment

**** LUNCH BREAK****

Instruction and Discussions
1:00 p.m. – 4:00 p.m.

Create an Integrated Business Architecture

- Integrating Performance Measures with IT Strategy
- Applying Performance Measures to IT Architecture, Management, and Mission Critical Goals

The Performance Reference Model and the Business Reference Model

- Learn how to apply these tools and what they were created to help you accomplish

Acquire the Methodologies that Produce Better IT Business Cases…and Meet OMB Criteria!

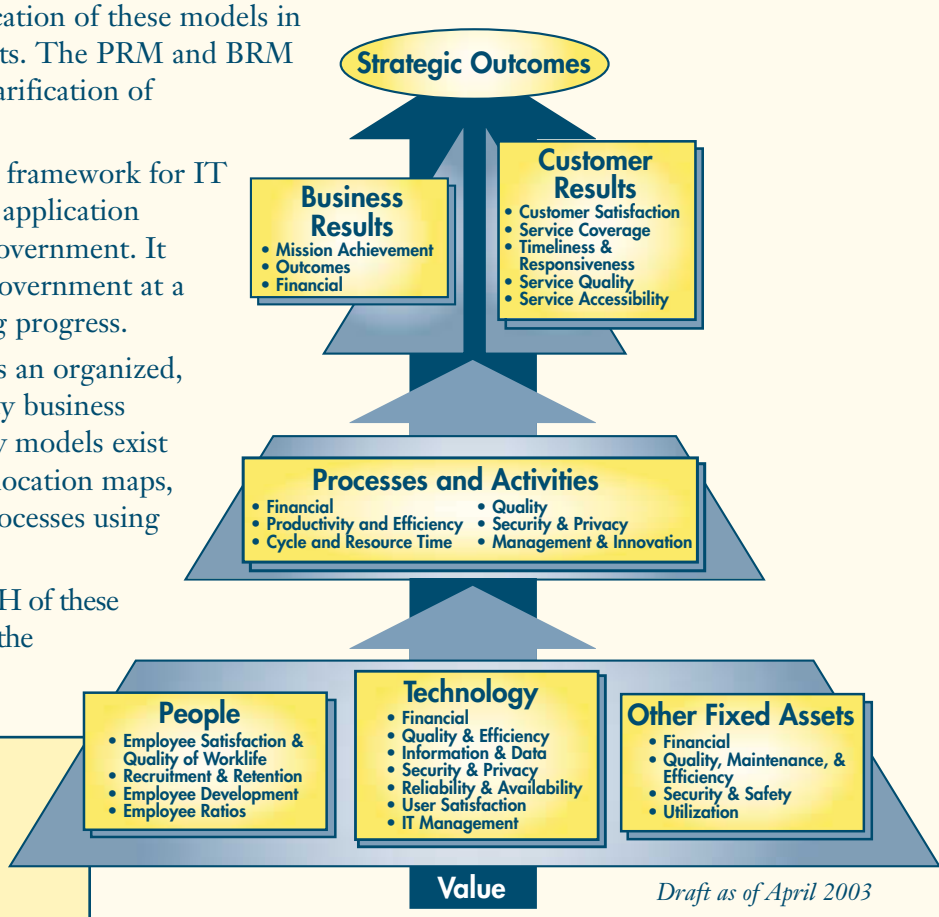
Business Reference Model (BRM) & Performance Reference Model (PRM)

It is important that agencies learn about the application of these models in order to remain compliant with OMB requirements. The PRM and BRM allow for the simplification of management and clarification of performance measures in federal programs.

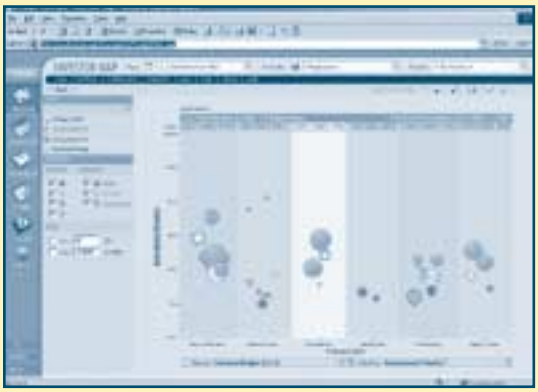
The **Performance Reference Model (PRM)** is a framework for IT performance measurement that provides common application measures for IT projects throughout the federal government. It allows agencies to better manage the business of government at a strategic level while providing a means for gauging 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 (organization charts, location maps, etc.) this model presents your agency's business processes using a functionally driven approach.

OMB expects budget justifications to align with BOTH of these models! The assistance we offer can help you achieve the required alignment.



Draft as of April 2003



Step-by-Step Toolkit for Business Case Development

Designed with OMB requirements for management and performance evaluation of IT projects in mind, the ProSight portfolio management tool used by the Institute offers guidance for increasing the performance of your initiatives. Tracking, managing, and communicating the overall "health" and status of projects and services is no longer a hassle. And, unlike project management solutions that focus on activity alone, this tool provides the strategic foundation for that activity. It helps you manage people, processes, vendors and technologies in the organization, and gives you the strategic information you need to educate your staff on the business reasons for their activities.

Model IT Performance Measures from Best Practice Survey

The Performance Institute, through its groundbreaking report on Creating a Performance Based e-Government, has led the way in evaluating the use of IT performance management in government. OMB has responded to this work by placing over $22 billion worth of programs on their high-risk list.

This report has allowed the Institute to learn about many of the new best practices in government IT and e-government initiatives. By working with the Performance Institute, you will gain access to these best practices, allowing you to move toward achieving a truly Citizen-Centered e-Government.



The recent report on "Creating a Performance-Based e-Government" laid out a step-by-step process that demonstrated how the PRM could work and was released in October 2002.