MANAGING FOR RESULTS
TRAINING PROGRAM

April 2008 – March 2010

DEVELOPED BY:
INTERAGENCY STEERING COMMITTEE
FOR MANAGING FOR RESULTS
AND
SCHAEFER CENTER FOR PUBLIC POLICY
UNIVERSITY OF BALTIMORE

MARTIN O’MALLEY
GOVERNOR

ANTHONY G. BROWN
LT. GOVERNOR
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Maryland State Government operates under a customer focused management model that includes Managing for Results (MFR) and StateStat. MFR is a strategic planning process that sets organizational direction and priorities, establishes desired program results/outcomes, and measures progress toward achieving those results. StateStat is a performance based government accountability process that involves regular and frequent submission, review and analysis of performance data; frequent accountability meetings with the Governor and Governor’s executive staff; continuous review of agency strategies and tactics to meet agency goals; and continuous assessment of agency progress toward achieving goals. StateStat and Managing for Results are complementary management and budgeting tools that share a commitment to continuous improvement in State government programs, and the improved efficiency and effectiveness of State government.

The MFR training program includes a core curriculum of courses provided by the University of Baltimore.

The purpose of the formalized classroom MFR training is to provide public managers and employees with: 1) a working knowledge of the principles of strategic planning and performance measurement, and 2) enhanced skills in practical application of these principles. It is highly recommended that agency personnel attend the MFR-100 Introduction to Managing for Results prior to obtaining consulting and/or facilitation assistance, and before attending other courses in the curriculum.
CUSTOMIZED TRAINING

The Schaefer Center, upon request will develop training customized to specific agency needs.

Customized training is not covered by the Agreement between the Dept. of Budget & Management and the Schaefer Center for Public Policy at the University of Baltimore (shown in Exhibit A). Agencies wishing to obtain customized training must negotiate an Agreement directly with the Schaefer Center. The cost of the customized training will include development expenses and will vary depending on the training requested.

For additional information, contact Ann Cotten at the Schaefer Center on 410-837-6257 or 410-837-6185.

CONSULTING AND FACILITATION SERVICES

Agencies may obtain consulting and facilitation services from the Schaefer Center by negotiating an agreement for provision of these services.

For additional information, contact Ann Cotten at the Schaefer Center on 410-837-6257 or 410-837-6185.
The Department of Budget & Management and the Schaefer Center at the University of Baltimore have signed an Agreement for provision of formalized training on Managing for Results (shown on page 60). This Agreement allows all State agencies to obtain these training services directly from the Schaefer Center without going through a formalized procurement process.

The basic Introduction to Managing for Results course (MFR 100) introduces strategic planning, performance measurement, data collection and data analysis. Participants do not develop strategic plans and performance measures for their agencies during the MFR 100 course.

The advanced courses are the 200, 300 and 400 series. The classes are interactive in nature, with the instructor guiding the discussion and exercises. Participants must complete the MFR 100 - Introduction to Managing for Results training course or an equivalent course prior to taking the advanced courses. See the table of contents for a complete listing of MFR courses.

Who should attend MFR training? MFR training is designed for employees who are involved in strategic planning and performance measurement activities. Increasing skills in these areas will be beneficial to meeting the requirements of both MFR and StateStat. Employees who should attend MFR training include executive directors, program administrators, budget analysts, personnel administrators, planners, information technology specialists, policy analysts, as well as other supervisory, mid-level and upper-level public administrators who are responsible for implementing MFR throughout State government. Employees who are directly involved in strategic planning efforts and performance measurement activities, including agency MFR Coordinators, also should attend the training.

Classes will begin at 9:00 a.m. and end at 4:00 p.m. To lessen disruption to the agencies, the multi-day courses will be conducted over a two-week period. Specific course dates are listed following the description of each course. Additional dates may be scheduled based upon demand.
TRAINING LOCATIONS AND PARKING

Courses will be offered at the University of Baltimore, in the Annapolis area, Ocean City, Waldorf, and Rocky Gap.

The majority of classes will be held at the University of Baltimore, Thumel Business Center, located at the corner of North Charles Street and West Mt. Royal Avenue. Parking is located in the Biddle Street Garage, located on Maryland Avenue between Chase and Biddle Streets. The University of Baltimore will provide parking passes with registration confirmations.

The University of Baltimore is in compliance with the American Disability Act. If class participants need assistance, they should contact Kimberly Hall at the Schaefer Center, 410-837-6257, two weeks prior to the start of class.

CLASS SIZE AND MINIMUM ENROLLMENT REQUIREMENTS

The Introduction to Managing For Results course (MFR 100) is limited to twenty-five (25) participants per class and the MFR-200, 300 and 400 training courses are limited to twenty persons (20) per class.

Minimum enrollment for the MFR 100 courses is fifteen (15) and the minimum enrollment for MFR-200, 300 and 400 courses is ten (10). Classes without the minimum enrollment will be cancelled no later than 7 days prior to the first day of class.
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<th>Course Number and Title</th>
<th>Location</th>
<th>Cost Per Day</th>
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<tr>
<td><strong>MFR 100</strong>&lt;br&gt;INTRODUCTION TO MANAGING FOR RESULTS&lt;br&gt;(3 DAY COURSE)</td>
<td>University of Baltimore, Baltimore Off-Site, Annapolis Off-Site, Waldorf, Rocky Gap, Ocean City</td>
<td>$168, $168, $170, $198</td>
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<tr>
<td>Min. # of Students</td>
<td>15</td>
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<tr>
<td>Max. # of Students</td>
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<td><strong>MFR-200, 3003 AND 4004 LEVEL COURSES</strong>&lt;br&gt;1 DAY COURSES</td>
<td>MFR 200, 201, 220, 303, 310, 315, 316, 317, 320 AND 400&lt;br&gt;2 DAY COURSES</td>
<td>MFR 202, 250, 300, 301, AND 410</td>
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<tr>
<td>Min. # of Students</td>
<td>10</td>
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<tr>
<td>Max. # of Students</td>
<td>20</td>
<td></td>
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<tr>
<td>University of Baltimore, Baltimore Off-Site, Annapolis Off-Site, Waldorf, Rocky Gap, Ocean City</td>
<td></td>
<td>$233, $252, $254, $296</td>
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<td><strong>MFR 304 AND 306</strong>&lt;br&gt;1 DAY COURSES&lt;br&gt;COMPUTER LAB</td>
<td>University of Baltimore, Baltimore Off-Site, Annapolis Off-Site, Ocean City, Rocky Gap, Waldorf</td>
<td>$253, $252, $254, $296</td>
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<tr>
<td>Min. # of Students</td>
<td>10</td>
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<tr>
<td>Max. # of Students</td>
<td>20</td>
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<tr>
<td><strong>MFR 600</strong>&lt;br&gt;1 DAY COURSE&lt;br&gt;USE OF MFR IN THE FORMULATION OF BUDGET REQUESTS</td>
<td>Contact Department of Budget &amp; Management at 410-260-7537 for more information.</td>
<td>No Cost</td>
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<td>Conducted by the Department of Budget &amp; Management</td>
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1 All off-site courses assume the agency requesting off-site training provides the facility, equipment, and computer lab if necessary.
2 The University of Baltimore incurs additional costs when courses are conducted off-campus.
3 These include all 300 level courses that do not require the use of a computer lab.
4 These include all 400 level courses that do not require the use of a computer lab.
PAYMENT

Upon receipt of invoices, agencies should make payment through the R*STARS system to the University of Baltimore. Agencies should direct questions concerning invoices to Diane Aull, Budget and Grants Administrator at 410-837-6209.

REGISTRATION

Agency MFR Coordinators handle all registration activities for the Managing for Results training, including substitutions, rescheduling, and cancellation of registrations. A list of coordinators and telephone numbers is provided on the DBM Web page. If your agency is not listed or if the MFR Coordinator information is incorrect, please contact Rachel Monks (DBM) at 410-260-7537 or Kimberly Hall (Schaefer Center) at 410-837-6257 or khall@ubalt.edu.

Registration, dates and locations for MFR 600 Use of MFR in the Formulation of Budget Requests are scheduled through DBM. Please contact Rachel Monks at 410-260-7537 to register. The instructor is either Cheri Gerard, Assistant Director, Office of Budget Analysis, Dept. of Budget & Management, or David A. Treasure, Director, Office of Budget Analysis, Dept. of Budget & Management. Training will be located in Annapolis.

Agency MFR Coordinators must make every effort to submit registrations as early as possible prior to the first day of class. Lack of minimum enrollment will result in cancellation of the class.

MFR Coordinators will receive notices from UB via e-mail of dates that courses are scheduled. Agencies that would like to request scheduling of a particular course, should contact The Schaefer Center at 410-837-6257.
WEATHER CANCELLATION POLICY

MFR training classes will be canceled if the University of Baltimore’s day classes are delayed (for any amount of time) or cancelled. University closings are announced on local TV and radio stations. In addition, class participants may call the University’s weather closing line at 410-837-4201. Weather closing announcements are usually made by 6:00 a.m., but can be made later if conditions warrant. Cancelled classes will be rescheduled.

POLICY ON SUBSTITUTION, RESCHEDULING, AND CANCELLATION

Substitution: Substitution is more advantageous to your agency than cancellation. Substitution is accepted up to the first day of the class. Written confirmation must be sent/faxed to the Schaefer Center with the name of the original registrant and the name of the substitute; or the substitute, on the first day of the class, must provide the Schaefer Center with the name of the person whom they are replacing.

Rescheduling: Course date changes are accepted without penalty up to two weeks before the first day of class. After this two-week period, agencies will be charged 50% of the registration fee for the changes plus the full registration fee for the new class.

Cancellation/No Shows: Agencies will be billed in full for all participants registered who do not show up for class or for whose registration is not cancelled in writing (mail or fax) two weeks before the start of class.
EVALUATION OF THE TRAINING PROGRAM

Participants in the training program will be expected to take part in an assessment of each course. This information will be used to redesign and strengthen the content and format of each training module and the overall program.

OBTAINING ADDITIONAL COPIES OF THE CATALOG

The MFR course catalog is available on the University of Baltimore - Schaefer Center for Public Policy Web site at http:\scpp.ubalt.edu, by selecting Managing for Results catalog.

COURSE DESCRIPTIONS

Following is a description of the MFR courses. An abbreviated outline of the course and a listing of any prerequisites follow a description of each course. Training participants are encouraged to attend the courses sequentially whenever possible (that is, in progression by course number – MFR-100, then 200, 201, 202, etc. CEUs are awarded to individuals who satisfactorily complete each course. One CEU is given for every 10 hours of class participation.
MFR 100
INTRODUCTION TO MANAGING FOR RESULTS
(3 DAYS)

The objectives of this course are as follows: (1) to discuss the processes by which members of an agency envision its future and develop strategic goals, objectives, and strategies necessary to achieve that future; (2) to develop an understanding of the concept of performance measurement and its use in measuring the progress of public programs and activities in achieving the outcomes stakeholders expect; (3) and to develop an understanding of the importance of organizational culture in building and sustaining a supportive environment for the effective implementation of MFR.

This course is divided into three modules (1 day each). Day one (Strategic Planning) focuses on the elements of strategic planning, detailing the purposes of strategic planning, identifying and understanding stakeholders, assessing the agency’s environment to identify strengths, weaknesses, opportunities, and threats, as well as developing and refining an agency’s mission, vision, and values. This day also focuses on identifying the key performance areas necessary for an organization to achieve its mission, formulating goals and objectives, and generating strategic alternatives, choosing strategies, and developing action plans to implement the strategies. The focus of day two (Performance Measurement) is on developing an understanding of the importance and value of performance measurement, distinguishing among various types of performance measures, creating performance measures, incorporating performance measures into the management process, and developing logic models. Day three (Data Collection, Management, and Reporting) emphasizes data collection management and reporting, data sources, conceptualization and operationalization issues, data preparation and analysis, and data presentation. The focus of this course is to link strategic planning to performance measurement.

This course must be taken prior to enrolling in the other MFR training courses.
I. Introduction to MFR and the Maryland Management Model
   A. Managing for Results Process
   B. MFR and Other Management Initiatives
      1. Continuous Quality Improvement (CQI)
      2. Maryland Performance Planning & Evaluation Program (PEP)
      3. Budgeting
   C. MFR Reporting Requirements

II. Basic Elements of the MFR Process
    A. Strategic Planning
       1. Situational Analysis
       2. Strategic Direction - Mission, Vision, Guiding Principles, Goals and Objectives
       3. Strategy and Action Plans
    B. Performance Measures

III. Situational Analysis
     A. External Environmental Assessment
        1. Customer
        2. Stakeholder
        3. Undertaking the Situational Analysis
     B. Internal Environmental Assessment
        1. Elements to be Examined
           a. Organizational culture
           b. People
           c. Structure
           d. Systems & processes
           e. Service
           f. Funding
           g. Outcomes
           h. Technology

IV. Strategic Directional Orientation
    A. Mission
       1. Criteria for Development of Mission Statement
          a. Identify stakeholders/customers
          b. Identify the services provided by the agency
          c. Identify the stakeholder/customer needs met by the services
          d. Identify the agency’s values
    B. Vision
       1. Criteria for Development of Vision Statements
          a. Clear hope for the future
          b. Challenging
          c. Inspirational
          d. Empowers employees
          e. Prepares for the future
          f. Memorable and provides guidance
C. Values
   1. Criteria for Development of Values
      a. People
      b. Process
      c. Performance

D. Goals
   1. Definition of Goals
   2. Criteria for Developing Goals
      a. What Outcome is Sought by the Goal?
      b. What Strategic Issue is Addressed by the Goal?
      c. What Performance Concept in the Goal is Measurable?
      d. Do the Current or Proposed Program Activities Relate to the Goals?
      e. Is the Number of Goals Manageable?

E. Objectives
   1. How do the Goals and Objectives Support the Agency’s Mission and Vision?
   2. Criteria for Well-Written Objectives
      a. Specific
      b. Measurable
      c. Aggressive (but attainable)
      d. Results-oriented
      e. Time-Bound

V. Strategies
A. What is Strategy?
   1. Definition of Strategy

B. Why Do You Need Strategy?

C. How to Develop and Implement Strategy

D. How Strategies Influence Attainment of Goals and Objectives

E. Criteria to Evaluate Strategies

F. Action Plans
I. What Are Performance Measures?
   A. Definition of Performance Measures
   B. Related Concepts
      1. Indicators
      2. Baselines
      3. Benchmarks

II. Why Performance Measurement?

III. Benefits of Performance Measurement

IV. Types of Performance Measures
   A. Input Measures
   B. Output Measures
   C. Outcome Measures
   D. Efficiency Measures
   E. Quality Measures
   F. Exercise 1

V. Uses of Performance Measures

VI. Steps in Institutionalizing Performance Measurement
   A. Identify Who Should Be Involved in Developing Measures
   B. Identify the Process Flow
   C. Identify the Critical Activities and Outcomes To Be Monitored
      1. Use of logic models
   D. Develop Performance Measures for Each Objective
      1. Characteristics of Good Performance Measures
         a. Informative
         b. Communicate valuable information
         c. Practical tools
      2. Exercise 2
   E. Establishing Performance Standards
   F. Identifying Responsibilities
   G. Linking Strategic Planning to Performance Measurement
   H. Linking Performance Measurement to Strategic Planning
I. Performance Data Collection and Performance Reporting
   A. Planning for Data Collection
      1. Determine the Data That Will Need to be Collected
      2. Determine the Population From Which the Data Will be Collected
      3. Determine the Length of Time Over Which the Data Will Need to be Collected
      4. Identify Sources of Data

II. Conceptualization, Operationalization, and Measurement
   A. Concepts and Conceptualization
   B. Indicators and Dimensions
   C. Operational Definitions
   D. Measurement
   E. Levels of Measurement
      1. Nominal
      2. Ordinal
      3. Interval
      4. Ratio
   F. Measurement Errors
   G. Criteria for Measurement Quality
      1. Reliability
      2. Validity
      3. Sensitivity
      4. Coverage

III. Data Sources
   A. Existing Agency Records
      1. Advantages and Disadvantages
   B. Customer Satisfaction and Client Surveys
      1. Identifying the Survey’s Objectives
      2. Types of Information to be Collected
         a. Attitudes
         b. Beliefs and Perceptions
         c. Behavior
      3. Specifying Information Needs
         a. Focus Groups
         b. Time Dimension
      4. Identifying the Target Population
   5. Methods of Surveying
      a. Mail Questionnaire
      b. Telephone
      c. Face-to-Face
6. Sampling
   a. The Logic of Sampling
   b. Determining Sample Size
   c. Sampling Designs
      1. Nonprobability Sampling
      2. Probability Sampling

7. Survey Design and Implementation
   a. Trained Observer Ratings
   b. Public Involvement Techniques
      1. Personal Instruction/Interviewing (Situational Analysis)
      2. Public Forums
      3. Public Meetings

IV. Performance Measurement Data and Database Management Integration
   A. Deciding When to Computerize Performance Information
   B. Choosing the Right Database Management Software for Your Performance Measurement Data
   C. Verifying and Validating Performance Data
   D. Integrating Performance Information Systems with Other Agency Systems

V. Measuring and Assessing Actual Performance

VI. Reporting Performance Data

VIII. Using Performance Data To Improve Public Management
MFR 200
DEVELOPING STRATEGIC GOALS, OBJECTIVES, & STRATEGIES (1 DAY)

This course will provide detailed instructions and assistance to participants on how to develop strategic goals, objectives, and strategies for their specific agencies. More specifically, the course will provide a guide to goal development that will help participants chart a strategic direction for their agency. In addition, the class will examine how to establish quantifiable interim steps (objectives) to be used in achieving an agency's vision and goals. Once an agency knows where it is headed, the next step is to determine how best to get there. The final part of the course will focus on devising and assessing strategies to accomplish goals and objectives. The primary objective of this training is to build skills and confidence in the development and use of goals, objectives, and strategies that are focused on outcomes rather than processes.

Prerequisite - MFR 100 or equivalent course.
I. Defining Goals, Objectives, and Strategies

II. Establishing Outcome Goals
   A. Expected Outcome: A prioritized list of your agency's goals.
   B. Process Description and Facilitation Directions
   C. Exercises

III. Establishing Objectives Focused on Outcomes
   A. Expected Outcome: A list of objectives that state the specific outcomes your agency expects to accomplish within a stated time frame.
   B. Objectives Are Specific and Measurable Targets for Accomplishment During a Stated Time Frame
   C. Each Objective Should Relate to a Particular Goal
       1. Objectives Focus on Results That, When Achieved, Promise to Move the Agency toward Its Stated Goals
   D. To Measure Progress Toward Achieving An Objective, An Agency Will Need to Establish a Baseline
   E. Characteristics of Effective Objectives
       1. Specific
       2. Measurable
       3. Aggressive, but Attainable
       4. Results-Oriented
       5. Time-Bound
   F. Process Description and Facilitation Directions
   G. Exercises

IV. Developing Strategies
   A. Expected Outcome: A List of Strategies That Your Agency Expects To Implement During the Next Fiscal Year
   B. Each Objective Should Have At Least One Strategy
   C. Each Strategy Should Be Examined For Resource Requirements Needed For Implementation
       1. Strategies must be categorized as follows:
           a. Having no impact on the budget or positions
           b. Requiring reallocation of resources with no net changes
           c. Reflecting a net savings of dollars or positions, or
           d. Reflecting a net cost in dollars or positions

V. A Strategy is the Method Used to Accomplish Goals and Objectives
   A. Strategy Evaluation and Choice
       1. Appropriateness
           a. Current strategic position
           b. Effect on strategic perspective
           c. Competencies and resources: available and needed
           d. Acceptable to strategic leaders and other key stakeholders
           e. Fit the culture and values of the agency
           f. Understandable and easily communicated
       2. Feasibility
           a. Change demands
           b. Resource availability
           c. Timing
           d. Competitive advantage
       3. Desirability
           a. Strategic needs
           b. Level of return expected
   B. Keys To Successful Implementation
   C. Exercises
MFR 201  
MECHANICS OF DEVELOPING PERFORMANCE MEASURES  
(1 DAY)

The focus of the class will be on linking performance measures to agency goals and objectives as well as establishing baselines to compare future performance. Emphasis will also be placed on developing measures for specific agency programs and/or activities.

Prerequisite - MFR 100 or equivalent course.
I. MFR and the Performance Measurement Framework  
   A. Components of MFR  
   B. Role of Performance Measures in the MFR Framework  
   C. DBM and Legislative Analyst Criteria for Performance Measures  
   D. Integration of Performance Measurement at Program, Administration, and Agency Levels  

II. Performance Measures  
   A. Types of Performance Measures  
      1. Input  
      2. Outcome  
      3. Outcome  
      4. Efficiency  
      5. Quality  
   B. Performance Measures as a System  
   C. Issues and Concerns in Developing each Type of Performance Measure  

III. Constructing A Logic Model for Your Program  
   A. Defining Outcomes of Interest  
   B. Preparing the Logic Model  
   C. Selecting Outcomes to Measure  
      1. The Role of the Stakeholder Analysis for Measures  
   D. Special Challenges in developing Performance Measures for Particular Programs  

IV. Exercises
MFR 202
COLLECTING AND INTERPRETING PERFORMANCE DATA
(2 DAYS)

Once an agency has decided what it wants to measure, what factors may influence the agency’s outcomes, and what specific information will indicate the program’s level of success, the next steps are to identify data sources for your indicators, design data collection methods, and pretest the data collection instruments. Advantages and disadvantages of data sources for specific outcome indicators will be examined, along with a comparison of the major data collection methods on characteristics such as cost, amount of training required for data collectors, completion time and response rate. Data collection issues will also focus on how to sample, who will collect the data, and how confidentiality of the data will be protected.

The second part of this course will focus on data analysis and reporting. Participants will learn whether they collected all the data needed to measure program outcomes, how to enter data and check for error, and how to tabulate the data. Moreover, participants will learn how to analyze the data. Agency managers will learn how to present data to various audiences in a clear and understandable form.

Prerequisite - MFR 100 or equivalent course.
I. Review of the MFR Performance Measurement Framework
   A. Goals
   B. Objectives
   C. Strategies

II. Review of Performance Measures
   A. Input
   B. Output
   C. Outcome
   D. Quality
   E. Efficiency

III. Development of Operational Measures
   A. Conceptual Measures
   B. Operational Measures

IV. Levels of Measurement
   A. Nominal
   B. Ordinal
   C. Ratio

V. Measuring Complex Phenomenon-Indices and Scales
   A. Types of Scales
   B. Building Indices

VI. Criteria for Measures
   A. Validity
   B. Reliability
   C. Sensitivity
   D. Coverage

VII. Collecting Data
   A. Data Sources
   B. Data Collection Processes
   C. Sampling for Surveys, for Case Audits
   D. 1. Techniques of Sampling
   E. 2. Number of Cases Needed
   F. Recording Data/Database Development
      1. Auditor Requirements for Databases

VIII. Quality Control of Data
   A. Cleaning data Independent of the Computer
   B. Cleaning data with the Computer

IX. Aggregation and Analysis of Data
   A. Descriptive Summaries
   B. Descriptive Statistics
   C. Inferential Statistics

X. Using Outcome Data
   A. Gap Analysis
This course is designed to instruct mid and upper level managers how to use MFR as a management system. The course will start with a discussion of Maryland’s Management Model and how MFR links to continuous Quality Improvement (CQI) and the Performance Evaluation Process (PEP). Next, participants will learn how to implement MFR throughout the organization. Emphasis will be placed upon the relationship among agency, division, and unit level goals, objectives, and strategies. Attention will be given to the relationship between strategies and unit and individual objectives. Participants will discuss techniques for monitoring MFR performance data on a weekly or monthly basis.
I. Maryland’s Management Model
   A. Managing for Results
   B. Performance Evaluation Process
   C. Continuous Quality Improvement

II. Implementing MFR Throughout Your Organization
   A. Agency Level Mission, Goals, Objectives, Strategies
      1. Time Horizon
      2. Linkages to Divisions, Programs, and Units
   B. Division Level Mission, Goals, Objectives, Strategies
      1. Time Horizon
      2. Link to Agency Objectives and Strategies
      3. Link to Unit and Program Level Objectives and Strategies
   C. Program and Unit Level Objectives, Strategies, and Action Plans
      1. Time Horizon
      2. Link to Division Goals and Objectives
      3. Link to Individual Performance Objectives

III. MFR and Your Agency’s Business Plan
   A. How to Use MFR to Develop Your Business Plan
   B. Linking MFR to Budget Requests

IV. Monitoring MFR Performance Measures
   A. Continuous Performance Measurement Monitoring as Key to
      Managing Program and Resources
   B. Adjusting your Strategies Throughout the Year
   C. Systems for Monitoring Performance
Government agencies, like all enterprises, are driven by and organized around business processes. In Managing for Results terms, business processes are the strategies by which agencies achieve their goals. Through improved business process management, agencies are able to more efficiently produce outputs and improve achievement of outcomes.

Activities within a business process are the building blocks of the agency. This is where value is created, where the majority of resources (dollars, hours, etc.) is consumed and is the point of connection with stakeholders, customers, vendors and governmental and non-profit partners.

Efficient processes contribute to responsive, productive and effective programs. Unfortunately, business processes in many agencies consist of a complex web of inefficient, outdated, and redundant activities and burdensome business rules and practices that hinder agency performance. Regrettably, these same processes, in many cases, serve as the basis for defining programmatic development and stakeholder requirements.

The goal of this intensive, focused course is to provide a practical and effective set of skills, techniques and methods for identifying, mapping, measuring, objectively analyzing and improving business processes and practices within your agency and across program and agency boundaries. The course will focus on targeting for improvement those processes that most influence the achievement of an agency’s outcomes.

This course comprises best practices, supporting techniques and practical knowledge gleaned from the experience of numerous real-world projects. It includes practical application of mapping, analysis, and improvement techniques.

This course is designed for program and fiscal staff, budget analysts, and operational managers and supervisors who are involved in business process improvement activities.

Prerequisite - MFR 100 or equivalent course.
I. Introduction
   A. Linking Business Process Analysis and Managing for Results
   B. Business Process Concepts
   C. Functions vs. Processes
   D. Evolution of Business Processes
   E. Intro to Business Process Analysis

II. Getting Started
   A. Process Change Drivers
   B. Organizing for Process Improvement
   C. Identifying Business Processes that Produce Outcomes
   D. Process Customers and Stakeholders
   E. Business Process Classification

III. Business Process Mapping
   A. Business Process Activities
   B. Process Mapping Concepts
   C. Dependency and Enablement
   D. External and Temporal Events
   E. Managing Complex Maps
   F. Mapping Style Variations

IV. Business Process Strategy
   A. Developing Process Strategy
   B. Process Valuation Criteria
   C. Information Technology Strategy
   D. Defining Process Objectives

V. Business Rule Analysis
   A. Process Oriented Business Rules
   B. Data Oriented Business Rules
   C. Analyzing Business Rules
   D. Linking Data to Process
   E. Implementing Business Rules
VI. Measuring the Process
   A. Why Measure a Business Process
   B. Measurement, Metrics and Indicators
   C. What to Measure (cycle time, queue time, production, resource utilization, cost, adaptability)
   D. When to Measure
   E. Establishing Process Measurement

VII. Business Process Analysis
   A. Analysis Concepts
   B. Identifying Process Gaps
   C. Root Cause Analysis
   D. Value Added vs. Suspect Activities
   E. Prioritizing Candidate Improvement

VIII. Process Improvement Tactics
   A. Introduction to Improvement Tactics
   B. Streamlining the Process
   C. Focusing the Process
   D. Re-Organizing the Process
   E. Balancing the Process
   F. Improving Responsiveness
MFR 300

ACTIVITY-BASED COSTING (2 DAYS)

Activity-based costing (ABC) is one of the newest management tools being used by federal, state, and local government agencies today to link agency performance and outcomes to the full cost of doing business. Because of the complexity of funding sources and pools of funds, it has historically been difficult for agencies to accurately determine the true cost of employee and agency activities. Through its approach of assigning "full costs" to activities at the employee level, ABC allows users to quickly determine the actual cost of specific services and activities, even when those activities are provided by people who have different funding sources, i.e., state and county-funded employees who provide the same service.

ABC allows managers to manage costs by quickly identifying value added and non value-added activities. ABC models allow managers to make accurate estimates of the impact of budget cuts or increases on program and agency capacity. ABC easily fits with strategic planning by allowing managers to identify the cost of meeting specific performance targets and therefore identifying opportunities for business process re-engineering.

This workshop is designed to introduce participants to the concept of activity-based costing, discuss how to identify key activities within an agency, provide examples of cost drivers, and describe how ABC supports continuous quality improvement and performance measurement. The workshop also uses lectures, demonstrations, and computer software to illustrate how to most effectively build an ABC model.

Prerequisite - MFR 100 or equivalent course.
I. Introduction
   A. What is Activity-Based Costing?
   B. ABC vs. Traditional Costing
   C. Costing Activities and Products
      1. ABC model
      2. How to Build an ABC Model
      3. Phase 1: Construct Each Module
         a. Resources
         b. Activities
         c. Cost objects
      4. Phase 2: Define Cost Assignment Paths and Specify Drivers
         a. Resource drivers
         b. Activity drivers
      5. Phase 3: Enter Data
      6. Phase 4: Calculate Costs

D. Implementing Activity-Based Costing and Management

E. Integrating ABC Systems
   1. Strategic Planning
   2. Performance Measures
   3. Compensation and Reward Systems
   4. Information Systems

II. Exercises and Demonstrations
MFR 301  
SURVEYS AND DATA ANALYSIS  
(2 DAYS)

Surveys are a data collection technique that will be widely used in implementing various components of the MFR process. Surveys can be used to gather information from an agency’s key stakeholders. In addition, customer satisfaction surveys can be used to assess the quality and effects of agency services. This course provides non-technical information and advice to agency managers who wish to conduct customer surveys. Among the topics covered are: the types of information that can be gathered through surveys, the advantages and disadvantages of different types of surveys (mail, telephone, and personal interview), questionnaire construction, and sampling strategies.
I. Planning the Survey
   A. Identifying the Objectives of the Survey
   B. Types of Information Collected
      1. Opinions and Attitudes
      2. Beliefs and Perceptions
      3. Behaviors
      4. Facts and Attributes

II. Sampling
   A. The Logic of Sampling
   B. Determining Sample Size
      1. Confidence Levels and Intervals
      2. Small Populations
      3. Analysis of Population Subgroups
      4. Computing Sample Size
   C. Sampling Designs
   D. The Dangers of Nonprobability Sampling
   E. Probability Sampling Methods
      1. Simple Random Sampling
      2. Systematic Sampling
      3. Stratified Random Sampling
      4. Cluster Sampling
   F. Weighting Cases

III. Survey Design and Implementation
   A. Basic Issues in Questionnaire Design
      1. Types of Questions
   B. Avoiding Bias in Questionnaire Design
   C. Composing Questions and Response Choices
   D. Composition Standards
   E. Issues of Survey Reliability and Validity
   F. Sources of Bias in Surveying
   G. Constructing Indexes and Scales
   H. Survey Reliability and Validity
   I. Sources of Bias in Surveying

IV. The Mail Questionnaire
   A. Importance of a Cover Letter
   B. Pretesting the Written Questionnaire
   C. The Mail Questionnaire Booklet
   D. Implementing the Mailing
   E. Tracking the Respondents
   F. Issues of Response Rate

V. The Telephone Survey
   A. The Introductory Spiel
   B. Question Wording and Complexity
   C. Pretesting the Questions and the Instrument
   D. Training Interviewers
   E. Tracking Respondents

VI. Exercises
MFR 303
FACILITATING YOUR AGENCY’S STRATEGIC PLANNING TEAM
(1 DAY)

There is nothing more important in the implementation of Managing For Results than an agency strategic planning effort. The strategic plan is the starting point and foundation for defining what an agency seeks to accomplish, identifying the strategies it will use to achieve desired outcomes and determining how well it will succeed in reaching its goals and objectives. For strategic planning to be done well, agencies must involve their stakeholders, assess their internal and external environments, and align their activities, core processes, and resources to support mission-related outcomes. The intent of this course is to use a set of questions to facilitate consultation on an agency’s strategic plan and help the agency determine how its strategic plan, strategic goals, and objectives can be improved to better support agency decision making.

Prerequisite - MFR 100 or equivalent course.
I. Key Questions on an Agency’s Strategic Plan
   A. Overall Assessment
      1. Is the plan consistent with executive and legislative priorities?
      2. Does the plan identify the legislative mandates to support the agency’s mission, vision, values, goals, and objectives?
      3. Does the agency’s plan identify the legislative mandates to support the agency’s missions, vision, values, goals, and objectives?
      4. Are other agencies’ plans attempting to achieve similar strategic goals and objectives?
      5. Were key stakeholders solicited for their input into the strategic plan?
      6. Does the plan include a general description of the information resources needed to meet the agency’s strategic goals?
      7. Overall, is the plan logical and do the various components of plan fit together?
      8. Can the average taxpayer understand the mission, vision, values, goals, and objectives of this agency?
   B. Mission Statement
      1. Is the mission results-oriented?
      2. Are parts of the agency’s functions and activities not covered in the mission statement?
      3. Are there developments (e.g. technology, demographic changes, etc.) that suggest the mission and enabling legislation should be revised or updated?
      4. Is the agency’s mission similar to those of other agencies? If yes, has coordination occurred?
   C. Goals
      1. Do the agency’s goals cover the major functions and operations of the agency?
      2. Are the goals outcome-oriented?
      3. Are the goals expressed in a manner that will allow the agency and others to assess whether the goals have been achieved?
      4. Do the agency’s goals appear similar to the goals in plans of other agencies?
      5. Are the goals targeted at outcomes over which the agency has a reasonable degree of influence?
   D. Objectives
      1. Are the agency’s objectives measurable?
      2. Do the agency’s objectives contain performance targets?
      3. Is there a target level and a time frame for obtaining the objectives?
   E. Strategies
      1. How are the goals and objectives to be achieved?
      2. What steps will the agency take to align its activities, core processes, workforce, and other resources to support its mission-related outcomes?
      3. What are the required resources (e.g. human, capital, and information)?
      4. Do managers have the knowledge, skills, and abilities to implement MFR?
      5. Are there programs or activities that need to be eliminated, created, or restructured to achieve the goals?

II. Updating Your Agency’s Strategic Plan

III. Exercises
The intent of this course is to introduce the participant to the basic concepts of database engineering that will provide them with a toolkit of skills and knowledge useful in the collection and management of data. It is not a vendor-based course. It is a foundation course that has application to all database management systems. At the end of the course, the participants should understand how to specify their requirements to an engineer and understand the structures in existing or newly engineered databases. Some participants should be able to begin engineering their own databases. Participants should also understand how to query a database to get the results that they expect.
COURSE OUTLINE

I. Data Entry and Definition
   A. Entering New Data
   B. Importing Data from Other Software

II. Basic Data Manipulation
    A. Recoding Variables
    B. Computing New Variables

III. Basic File Manipulation
     A. Sorting Data
     B. Merging Files
     C. Selecting Specific Cases for Analysis

IV. Elementary Analysis
    A. Frequency Distributions and Descriptive Statistics
    B. Cross-tabulations and Measures of Association
    C. Chi-square Analysis

V. Producing Graphics and Reports
MFR 306
Analyzing Data in Excel (1 Day)

This course is designed to be an introduction to the statistics most commonly used for performance measurement data. The primary focus will be on choosing and interpreting the appropriate statistics including measures of dispersion, measures of central tendency (mean, median, and mode), analysis of crosstabulations and elementary inferential statistics. We will also cover basic concepts of data, levels of measurement, and sampling as a prelude to statistical analysis. The course will use EXCEL and a good working knowledge of EXCEL is expected.
COURSE OUTLINE

I. Data Concepts

II. Levels of measurement

III. Sampling and sample error

IV. Choosing and Using Measures of Central Tendency mean, median, modal value

V. Choosing and Using measures of Dispersion range, interquartile range, variance, standard deviation

VI. Understanding the limits of generalization margins of error, standard error of the mean

VII. Building Crosstab Tables correctly percentaging and analyzing tables

VIII. Determining statistical significance
MFR 310
PREPARING YOUR AGENCY FOR A PERFORMANCE MEASUREMENT AUDIT
(1 DAY)

This course will introduce agencies to the approach that will be taken by the Department of Legislative Services to auditing of MFR performance measures and related materials. The focus of the Legislative audit will be on the accuracy of performance data reported in agency MFR submissions to the Department of Budget and Management. This course will emphasize the various steps that auditors will follow during an audit of State agencies’ MFR data.
I. Steps in the Auditing Process
   A. Determining the Measures to be Examined
      1. Measures selected for Audit will be based on a Risk-Assessment
         a. Changes in organizational structure or personnel
         b. Expressions of concern by legislators
         c. Patterns of unexpected performance
         d. Dollars appropriated to an agency
         e. Indications from previous audits that an agency has performance
            measurement control weaknesses
      2. Types of Measures Selected for Audit
         a. Measures that represent a large amount of expenditure of funds
         b. Measures that represent important activities of an agency
         c. Measures that have Legislative interest
         d. Measures associated with programs that have documented difficulties
   B. Determining if the Agency can Recreate the Number Reported
      1. The Need to keep Summary Documentation
      2. Performance Data must be within a Tolerable Error Range to be
         Considered Accurate
   C. Determining the Methodology Used by the Agency to Collect and Assess
      Performance Data
   D. Determining whether the way in which an Agency Calculates a Performance
      Measure is the same as the Performance Measurement Definition
   E. Determining whether the Performance Data are kept on a Manual or
      Automated System
   F. Determining whether Adequate Control Mechanisms are in place in order to
      ensure the Consistent and Accurate Reporting of Information
   G. Determining the Items to be Sampled
   H. Choosing a Sample
   I. Checking Source Documentation for Accuracy
   J. Determining the Certification Category for Each Performance Measure
      1. Certified
      2. Certified with Qualification
      3. Factors Prevented Certification
      4. Inaccurate
MFR 315
Performance Budgeting
(1 Day)

This course reviews how performance measurement and strategic planning can be used as part of the budgeting process. The components of strategic planning and performance measurement will be reviewed as well as ways in which performance measures can be used to enhance the budgetary decision process, especially during periods of cutback and retrenchment. Of particular emphasis will be the use of gap analysis to determine why program performance does not meet expectations. Also to be discussed are strategies that can be developed to address either poor or exceptional program performance.

Prerequisite - MFR 100 or equivalent course.
COURSE OUTLINE

I. Review of the MFR Performance Measurement Framework
   A. Mission
   B. Vision
   C. Goals
   D. Objectives
      1. SMART
      2. Performance Measures Imbedded
   E. Strategies
      1. Action Plans
   F. Hierarchy of Goals and Objectives

II. Performance Measures
   A. Key Elements of Performance Measures
   B. Types of Performance Measures
      1. Input
      2. Output
      3. Outcome
      4. Efficiency
      5. Quality

III. Diagnosing Performance Shortfalls
   A. Use of GAP Analysis
   B. Activity/Process Mapping
   C. Other Diagnostic Tools

IV. Incorporating Performance Information into Budgeting
   A. Experience of Other States/Localities
   B. Use of Performance Measurement in Cutback Management
   C. Use in Developing Future Budgets
   D. Knowing When Intervention is Needed
MFR 316
MFR REFRESHER (1 DAY)

Designed for those who have knowledge about MFR either through training or on the job experience but feel they do not fully understand MFR, this course provides an overview of Managing for Results as a strategic management and performance monitoring system. Included in the course will be discussion of the MFR strategic planning process and the need for vertical and horizontal integration of MFR plans within an agency. This will be followed by a discussion of how to write strategic objectives. Participants will review the five types of performance measures and learn how to determine which measures should be externally reported and which should be internally monitored. The session will conclude with a discussion of the importance of data integrity and methods agencies can follow to ensure the integrity of their data.
I. Overview of the MFR strategic planning and management framework

II. Fitting it all together: mission, vision, values, goals, objectives, and performance measures

III. Integrating strategic planning throughout your agency

IV. Objectives and performance measures: externally reported and internally monitored measures

V. The importance of regular performance measurement and monitoring

VI. Data integrity: The key to a reliable performance monitoring system

VII. Methods for ensuring data integrity
MFR 317
ENSURING DATA INTEGRITY (1 DAY)

This course reviews best practices in gathering, handling, transforming, and storing data. Particular focus will be on collecting reliable and verifiable data as well as the best practices in data handling and management. Also to be reviewed are new data security standards under HIPAA.
I. Accuracy and Quality of Data Collection  
   A. Creation and Documentation of the Operational definition  
   B. Data Reliability and Accuracy  
      1. Issues in Data Reliability and Accuracy  
      2. Checklist for Data Reliability  
   C. Developing Quality Data Collection Instruments  
      1. Customer Surveys  
         a. Instruments  
         b. Protocols  
      2. Data Extraction Forms  
         a. Use of Intercoder Reliability Checks  

II. Controls and Documentation for Data Input and Manipulation  
   A. Data Input Controls  
      1. Manual System  
      2. Automated System  
      3. Case of Third Party Data Entry  
   B. Data Processing Controls  
   C. Review Controls  
   D. Choosing Appropriate Modes of Analysis  
      1. Role of Level of Measurement of Data  
      2. What are you Trying to Show  

III. Data Storage and Security  
   A. HIPAA standards: Best Practices in Confidentiality and Security
MFR 320
HOW TO AUDIT AN AGENCY’S PERFORMANCE MEASURES: A COURSE FOR INTERNAL AND LEGISLATIVE AUDITORS (1 DAY)

This course will introduce performance measurement audit techniques to internal auditors and other agency personnel responsible for verifying the integrity of agency performance measures. The course will cover the approach used by the Department of Legislative Services to auditing of MFR performance measures and related materials. The focus will be on applying the Legislative audit procedures to your agency’s MFR performance data.
I. Review of MFR Concepts

II. Reviewing the 'appropriateness' of your Agencies Performance Measures

III. Steps in the Performance Measurement Auditing Process
   A. Determining the Measures to be Examined
      1. Using Risk Assessment to Select Measures for Audit
         a. Changes in organizational structure or personnel
         b. Expressions of concern by legislators
         c. Patterns of unexpected performance
         d. Dollars appropriated to an agency
         e. Indications from previous audits that an agency has performance measurement control weaknesses
      2. Types of Measures Selected for Audit
         a. Measures that represent a large amount of expenditure of funds
         b. Measures that represent important activities of your agency
         c. Measures that have Legislative interest
         d. Measures associated with programs that have documented difficulties
   B. Determining if Your Agency can Recreate the Number Reported
      1. The Need to keep Summary Documentation
      2. Performance Data must be within a Tolerable Error Range to be Considered Accurate
   C. Determining the Methodology Used to Collect and Assess Performance Data
   D. Determining if the Calculation Method for a Performance Measure Matches the Performance Measurement Definition
   E. Determining Whether the Performance Data are kept on a Manual or Automated System
   F. Determining Whether Adequate Control Mechanisms are in Place in Order to Ensure the Consistent and Accurate Reporting of Information
   G. Determining the Items to be Sampled
   H. Choosing a Sample
   I. Checking Source Documentation for Accuracy
   J. Determining the Certification Category for Each Performance Measure
      1. Certified
      2. Certified with Qualification
      3. Factors Preventing Certification
      4. Inaccurate
MFR 400
INTEGRATING CQI WITH MFR
(1 DAY)

There is increasing realization that most administrators and other State employees do not clearly understand the connection of CQI to MFR. They tend to see MFR and CQI as separate and disjointed initiatives. This results in diluting the potential benefits that could have been derived from a more coordinated implementation of these initiatives. This course will attempt to address these issues. The objectives of the training course on “Integrating CQI with MFR” will include the following:

1. Develop awareness of the benefits and challenges of CQI implementation.
2. Demonstrate how CQI implementation can enhance performance excellence and customer satisfaction in State agencies.
3. Show how CQI implementation involves managing change in organizations.
4. Show how the CQI framework can be used to facilitate a more effective achievement of agency initiatives such as MFR.
5. Discuss the basic requirements for effective CQI implementation.

This course is offered by The Program for Service Excellence within the Merrick School of Business at the University of Baltimore. Dr. Tigi Mersha, a professor of management, developed the course and will be providing the training. For additional information regarding performance improvement training offered by The Program for Service Excellence, email Dr. Mersha at tmersha@ubmail.ubalt.edu or nkershaw@ubmail.ubalt.edu or call 410-837-4965.

Prerequisite - MFR 100 or equivalent course.
MFR 400 INTEGRATING CQI WITH MFR (1 DAY)

I. Introduction
II. CQI Implementation as a Change Management System
III. Linking MFR and CQI
IV. Basic Requirements for Successful Implementation of CQI
V. The Continuous Improvement Process
VI. Toolkit for Continuous Improvement
VII. Proposed Duration of the Training
MFR 410
CONTINUOUS IMPROVEMENT FOR PERFORMANCE EXCELLENCE
(2 DAYS)

This two-day training will be offered in two sessions. The first session will review the basic continuous improvement framework as well as introduce the various problem solving tools used to achieve ongoing performance improvement. Topics covered include:

- The continuous improvement cycle
- Criteria for selecting improvement projects
- Idea generation and list reduction methods
- Root cause analysis methods
- Tools for data collection and analysis
- Planning and control tools
- Reporting methods

The second day will be a hands-on session in which participants will practice using the various problem solving techniques in a group setting.
MFR 600
USE OF MFR IN THE FORMULATION OF BUDGET REQUESTS
(1 DAY)

This course is to demonstrate the use of Managing for Results principles and concepts in the formulation of budget requests. The course will emphasize the importance of sound strategic planning as a basis for good budgeting. Budget requests will be shown to be components of strategies directed toward the accomplishment of agency goals and objectives. The use of performance measures to estimate the results to be accomplished by the programs for which funding is requested will also be presented.

Prerequisite - MFR 100 or equivalent course.

Registration, dates and location are scheduled through DBM. Please contact Rachel Monks at 410-260-7537 to register. The instructor is either Cheri Gerard, Assistant Director, Office of Budget Analysis, or David A. Treasure, Director, Office of Budget Analysis, Department of Budget Analysis. Training will be located in Annapolis.
I. MFR Role in Budget Theory and Practice

II. MFR Products Most Relevant to Budget Requests
   A. Goals
   B. Objectives
   C. Strategies
   D. Action Plans
   E. Performance Measures

III. Defining and Addressing Programs Through Budget Requests Based on MFR Principles
   A. Defining the problem
   B. Documenting the problem
   C. Devising a local strategy to address the problem
   D. Considering alternative strategies
   E. Aligning strategy within the MFR strategic plan
   F. Identifying results to be achieved by the strategy embodied in the budget request
   G. Formulating performance measures to measure the results as well as key outputs and measures of other aspects of the strategy
   H. Estimating the levels of the measures in future years

IV. Use of the Form DA-21 to Justify Budget Requests
   A. Good Examples
   B. Bad Examples

V. Estimating Budget Requirements
The following schedule shows the minimum number of classes to be offered. Additional classes will be scheduled based on demand. Agencies should contact Kimberly Hall (Schaefer Center) at 410-837-6257 or khall@ubalt.edu if they wish to schedule classes on additional dates.

<table>
<thead>
<tr>
<th>MFR 100 - INTRODUCTION TO MANAGING FOR RESULTS (3 DAYS)</th>
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<tbody>
<tr>
<td><strong>2008</strong></td>
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<tr>
<td>FEBRUARY 19, 20, 21</td>
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<td>JUNE 3, 4, 5</td>
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<td>SEPTEMBER 10, 11, 12</td>
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<td>DECEMBER 9, 10, 11</td>
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<td><strong>2009</strong></td>
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<td>FEBRUARY 10, 11, 12</td>
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<td>MAY 6, 7, 8</td>
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<td>JULY 7, 8, 9</td>
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<td>NOVEMBER 17, 18, 19</td>
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<td><strong>2010</strong></td>
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<td>JAN 12, 13, 14</td>
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<td>APRIL 7, 8, 9</td>
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<td>JUNE 22, 23, 24</td>
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<td>SEPTEMBER 14, 15, 16</td>
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Additional classes will be scheduled as needed.

<table>
<thead>
<tr>
<th>MFR 200 – DEVELOPING STRATEGIC GOALS, OBJECTIVES, AND STRATEGIES (1 DAY)</th>
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Classes will be scheduled as needed.

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<thead>
<tr>
<th>MFR 201 - MECHANICS OF DEVELOPING PERFORMANCE MEASURES (1 DAY)</th>
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Classes will be scheduled as needed.

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<thead>
<tr>
<th>MFR 202 - COLLECTING AND INTERPRETING PERFORMANCE DATA (2 DAYS)</th>
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<td>TBA</td>
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Classes will be scheduled as needed.

<table>
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<tr>
<th>MFR 220 – MANAGING WITH MFR (1 DAY)</th>
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<td>TBA</td>
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Classes will be scheduled as needed.

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<tr>
<th>MFR 250 – IMPROVING BUSINESS PROCESSES TO ACHIEVE OUTCOMES (2 DAYS)</th>
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<td>August 7 &amp; 8, 2008</td>
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Additional classes will be scheduled as needed.
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<th>Course Code</th>
<th>Course Title</th>
<th>Dates</th>
<th>Details</th>
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</thead>
<tbody>
<tr>
<td>MFR 300</td>
<td>Activity Based Costing (2 Days)</td>
<td>TBA</td>
<td>Classes will be scheduled as needed.</td>
</tr>
<tr>
<td>MFR 301</td>
<td>Surveys and Data Analysis (2 Days)</td>
<td>TBA</td>
<td>Classes will be scheduled as needed.</td>
</tr>
<tr>
<td>MFR 303</td>
<td>Facilitating Your Agency’s Strategic Planning Team (1 Day)</td>
<td>TBA</td>
<td>Classes will be scheduled as needed.</td>
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<tr>
<td>MFR 304</td>
<td>Data Analysis and Management Using SPSS (1 Day)</td>
<td>TBA</td>
<td>Classes will be scheduled as needed.</td>
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<tr>
<td>MFR 306</td>
<td>Analyzing Data in Excel (1 Day)</td>
<td>TBA</td>
<td>Classes will be scheduled as needed.</td>
</tr>
<tr>
<td>MFR 310</td>
<td>Preparing Your Agency for a Performance Measurement Audit (1 Day)</td>
<td>October 9, 2008, December 2, 2008</td>
<td>Additional classes will be scheduled as needed.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>TBA</td>
<td>Classes will be scheduled as needed.</td>
</tr>
<tr>
<td>Course Code</td>
<td>Course Title</td>
<td>Dates</td>
<td>Additional Information</td>
</tr>
<tr>
<td>------------</td>
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<td>----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>MFR 316</td>
<td>MFR REFRESHER (1 DAY)</td>
<td>TBA</td>
<td>Classes will be scheduled as needed.</td>
</tr>
<tr>
<td>MFR 317</td>
<td>ENSURING DATA INTEGRITY (1 DAY)</td>
<td>July 10, 2008</td>
<td>October 29, 2008</td>
</tr>
<tr>
<td>MFR 320</td>
<td>HOW TO AUDIT YOUR AGENCY’S PERFORMANCE MEASURES: A COURSE FOR INTERNAL AND LEGISLATIVE AUDITORS (1 DAY)</td>
<td>TBA</td>
<td>Classes will be scheduled as needed.</td>
</tr>
<tr>
<td>MFR 400</td>
<td>INTEGRATING CQI WITH MFR (1 DAY)</td>
<td>TBA</td>
<td>Classes will be scheduled as needed.</td>
</tr>
<tr>
<td>MFR 410</td>
<td>CONTINUOUS IMPROVEMENT FOR PERFORMANCE EXCELLENCE (2 DAYS)</td>
<td>TBA</td>
<td>Classes will be scheduled as needed.</td>
</tr>
<tr>
<td>MFR 600</td>
<td>USE OF MFR IN THE FORMULATION OF BUDGET REQUESTS (1 DAY)</td>
<td>Registration, dates and location for this course are scheduled through DBM upon agency request. Please contact Rachel Monks on 410-260-7537 for more information.</td>
<td></td>
</tr>
</tbody>
</table>
**Schaefer Center for Public Policy - University of Baltimore**  
**Managing for Results Registration Form**

Course # and Date(s): __________________________    MFR Coordinator's Name: ____________________________

Registration Date: __________________________    Coordinator's Phone Number: __________________________

ALL REGISTRATIONS MUST COME THROUGH YOUR MFR COORDINATOR.

<table>
<thead>
<tr>
<th>Name of Participant ID # (Birth month/day/last 4 digits of social security number)</th>
<th>Agency Name and Agency Address for Participant</th>
<th>Telephone and Fax Number</th>
<th>Attended MFR 100 Prerequisite</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMAIL ADDRESS:</td>
<td>Telephone:</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>EMAIL ADDRESS:</td>
<td>Fax:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EMAIL ADDRESS:</td>
<td>Telephone:</td>
<td>No</td>
<td></td>
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<td>EMAIL ADDRESS:</td>
<td>Fax:</td>
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</tr>
<tr>
<td>EMAIL ADDRESS:</td>
<td>Telephone:</td>
<td>Yes</td>
<td></td>
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<tr>
<td>EMAIL ADDRESS:</td>
<td>Fax:</td>
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</tr>
<tr>
<td>EMAIL ADDRESS:</td>
<td>Telephone:</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>EMAIL ADDRESS:</td>
<td>Fax:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Information about the MFR training program may be obtained from the Schaefer Center for Public Policy and staff to the Interagency Steering Committee for Managing for Results.

**SCHAEFER CENTER FOR PUBLIC POLICY**

Ann Cotten, Director  
410-837-6185

Mary Lovegrove, Assistant Director  
410-837-6188

MFR Scheduling Coordinator  
410-837-6257

Pam Bishop, Business Service Specialist  
410-837-6188

Schaefer Center for Public Policy  
Fax: 410-837-6175

**Trainners**

Mr. Jim Bradley  
Ms. Ann Cotten  
Dr. Tom Darling  
Dr. Louis Gawthrop  
Dr. Don Haynes  
Dr. Lenneal Henderson  
Dr. William Kittredge  

Dr. Dennis McGrath  
Dr. Dan Martin  
Dr. Tigi Mersha  
Dr. Larry Thomas  
Mr. David Treasure  
Dr. Laura Wilson-Gentry
1. Douglas Wilson  
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2. Ann Cotten  
Director  
William Donald Schaefer Center  
University of Baltimore  
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acotten@ubalt.edu

3. Rachel Monks  
Policy Analyst  
Office of Budget Analysis  
Department of Budget & Management  
45 Calvert Street  
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4. Vacant  
Managing Director for Off. of Administrative Services  
Dept. of Business & Economic Dev.  
217 E. Redwood Street, Suite 1501  
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Fax: 410-767-2031

5. Michial Gill, Ph.D.  
Deputy Director  
Governmental Relations  
MD State Department of Education  
200 W. Baltimore Street  
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410-767-3170  
410-260-6028 (Annapolis)  
Fax: 410-333-2226  
Fax: 410-260-6032 (Annapolis)  
mgill@msde.state.md.us

6. Sue Battle-McDonald  
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MD Department of the Environment  
1800 Washington Blvd.  
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sbattle-mcdonald@mde.state.md.us

7. Senator Ulysses Currie  
3 West, Miller Senate Building  
11 Bladen Street  
Annapolis, MD 21401-1991  
301-858-3127  
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ulysses_currie@senate.state.md.us

8. Delegate Guy J. Guzzone  
223 Lowe House Office Building  
6 Bladen Street  
Annapolis, MD 21401-1991  
410-841-3471  
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9. Ian Tisdale  
Public Affairs Specialist  
Department of General Services  
301 W. Preston Street, Suite 1403  
Baltimore, MD 21201  
410-767-1615  
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10. John Newman  
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Budget & Management Office  
201 W. Preston Street  
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12. James Witherspoon  
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311 W. Saratoga Street, Suite 270  
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13. Lauren Gordon  
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120 W. Fayette Street  
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14. Michele Langston  
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Fax: 410-333-5311  
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15. Mark Hoffman  
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16. Mary Clapsaddle  
Operating Budget Manager  
Office of Policy Analysis  
Department of Legislative Services  
90 State Circle, Room  
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17. Rebecca Gowen  
Chief, Strategic Planning  
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300 E Joppa Rd, Suite 1000  
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Fax: 410-339-4227  
gowen@dpscs.state.md.us

18. Capt. Thomas Williams  
Department of State Police  
1201 Reisterstown Road  
Pikesville, MD 21208-3899  
410-653-4254  
Fax: 410-653-4250  
twilliams@mdsp.org
The most current rosters of the MFR Steering Committee members and agency MFR Coordinators may be viewed on the Managing for Results page of the DBM Website.
MFR TRAINING AGREEMENT

This agreement, effective April 1, 2008, is between the Department of Budget & Management (the “Department”) and the University of Baltimore, Schaefer Center for Public Policy (the “Contractor”).

The Department and the Contractor agree to the following:

1. The Contractor shall provide course offerings to State agencies on the Managing for Results Initiative in accordance with the MFR course catalog. The catalog may be modified by the mutual consent of the Department and the Contractor throughout the term of this agreement.

2. While the Department cannot guarantee a minimum enrollment, the Department will make a good faith effort to publicize course offerings to State agencies and meet minimum registration requirements as specified in the catalog. The Contractor may cancel classes that do not meet the minimum enrollment requirements stated in the catalog.

3. The Contractor agrees to handle all administrative support and registration functions for all training classes. This includes scheduling and registering participants, notifying participants of training dates and locations, and providing training materials.

4. Training will be conducted at the University of Baltimore and at various State facilities as determined by mutual agreement between the Chair of the Governor’s Interagency Steering Committee for Managing for Results and the Contractor.

5. The Contractor will charge agencies on a per person per day basis. The costs include curriculum development expenses incurred by the Contractor, and beverages for all classes. The costs of each course will vary depending on the level and location. The rates for the term of this agreement are included in the attached cost table, and are part of this agreement.

6. The Contractor will bill agencies directly for payment of all fees. Agencies that cancel registrations in writing two weeks before the first day of class will not be charged. Agencies will be permitted to provide substitutes for registered participants who are unable to attend scheduled classes. Course costs will not be refunded for registered participants who do not appear or do not send a substitute for scheduled sessions. Agencies that reschedule class registrations less than two weeks before the first day of class will be charged 50% of the basic registration fee for the changes plus the full registration fee for the new classes.

7. The Contractor agrees to permit members and staff of the Interagency Steering Committee for Managing for Results to attend training sessions at no cost, space permitting.

8. The Contractor agrees to provide to the Department quarterly reports that provide the amount billed and paid in the most recently completed quarter, and cumulative billed and paid amounts for MFR training for the term of this agreement. The Contractor also agrees to provide to the Department quarterly reports that include by course the total numbers of classes offered, taught, and cancelled, as well as the total enrollment by course; and provide by agency the number of individuals attending each course taught, and the total attendees by agency for all courses taught. This data is to be provided to Rachel Monks, Office of Budget Analysis, using the format of the attached reporting templates which are part of this agreement. The Department will provide electronic copies of the reporting templates to the Contractor, and the Contractor will submit the completed reports to the Department electronically using the templates provided. The Department may revise the format of the templates as needed during the course of this agreement.

9. The Contractor agrees to meet periodically as needed with the Department and/or the Interagency Steering Committee for Managing for Results to assess and evaluate the training program and to make reasonable modifications to the program as requested.

10. All classes under this agreement shall be completed by March 31, 2010.
<table>
<thead>
<tr>
<th>Course Number and Title</th>
<th>Location</th>
<th>Cost Per Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>MFR 100 INTRODUCTION TO MANAGING FOR RESULTS (3 DAY COURSE)</td>
<td>University of Baltimore</td>
<td>$168</td>
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<tr>
<td></td>
<td>Baltimore Off-Site5</td>
<td>$168</td>
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<td></td>
<td>Annapolis Off-Site</td>
<td>$170</td>
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<tr>
<td></td>
<td>Waldorf, Rocky Gap, Ocean City6</td>
<td>$198</td>
</tr>
<tr>
<td></td>
<td>Min. # of Students 15</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Max. # of Students 25</td>
<td></td>
</tr>
<tr>
<td>MFR-200, 3007 AND 4008 LEVEL COURSES</td>
<td>University of Baltimore</td>
<td>$233</td>
</tr>
<tr>
<td>1 DAY COURSES MFR 200, 201, 220, 303, 310, 315, 316, 317, 320 AND 400</td>
<td>Baltimore Off-Site</td>
<td>$252</td>
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<tr>
<td>2 DAY COURSES MFR 202, 250, 300, 301, AND 410</td>
<td>Annapolis Off-Site</td>
<td>$254</td>
</tr>
<tr>
<td></td>
<td>Waldorf, Rocky Gap, Ocean City</td>
<td>$296</td>
</tr>
<tr>
<td></td>
<td>Min. # of Students 10</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Max. # of Students 20</td>
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</tr>
<tr>
<td>MFR 304 AND 306 1 DAY COURSES COMPUTER LAB</td>
<td>University of Baltimore</td>
<td>$253</td>
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<td>Baltimore Off-Site</td>
<td>$252</td>
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<tr>
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<td>Annapolis Off-Site</td>
<td>$254</td>
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<tr>
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<td>Ocean City, Rocky Gap, Waldorf</td>
<td>$296</td>
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<tr>
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<td>Min. # of Students 10</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Max. # of Students 20</td>
<td></td>
</tr>
<tr>
<td>MFR 600 1 DAY COURSE USE OF MFR IN THE FORMULATION OF BUDGET REQUESTS</td>
<td>Contact Department of Budget &amp; Management at 410-260-7537 for more information.</td>
<td>No Cost</td>
</tr>
<tr>
<td></td>
<td>Baltimore/Annapolis Area</td>
<td></td>
</tr>
</tbody>
</table>

5 All off-site courses assume the agency requesting off-site training provides the facility, equipment, and computer lab if necessary.
6 The University of Baltimore incurs additional costs when courses are conducted off-campus.
7 These include all 300 level courses that do not require the use of a computer lab.
8 These include all 400 level courses that do not require the use of a computer lab.