

MANAGING FOR RESULTS TRAINING PROGRAM

April 2008 – March 2010

DEVELOPED BY:

INTERAGENCY STEERING COMMITTEE
FOR MANAGING FOR RESULTS
AND
SCHAEFER CENTER FOR PUBLIC POLICY
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BACKGROUND

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.

CORE CURRICULUM

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.

CLASS SCHEDULE

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.

COURSE COST

April 1, 2008 – March 31, 2010		
Course Number and Title	Location	Cost Per Day
MFR 100 INTRODUCTION TO MANAGING FOR RESULTS (3 DAY COURSE) Min. # of Students 15 Max. # of Students 25	University of Baltimore	\$168
	Baltimore Off-Site ¹	\$168
	Annapolis Off-Site	\$170
	Waldorf, Rocky Gap, Ocean City ²	\$198
MFR-200, 3003 AND 4004 LEVEL COURSES 1 DAY COURSES MFR 200, 201, 220, 303, 310, 315, 316, 317, 320 AND 400 2 DAY COURSES MFR 202, 250, 300,301, AND 410 Min. # of Students 10 Max. # of Students 20	University of Baltimore	\$233
	Baltimore Off-Site	\$252
	Annapolis Off-Site	\$254
	Waldorf, Rocky Gap, Ocean City	\$296
MFR 304 AND 306 1 DAY COURSES COMPUTER LAB Min. # of Students 10 Max. # of Students 20	University of Baltimore	\$253
	Baltimore Off-Site	\$252
	Annapolis Off-Site	\$254
	Ocean City, Rocky Gap, Waldorf	\$296
MFR 600 1 DAY COURSE USE OF MFR IN THE FORMULATION OF BUDGET REQUESTS Conducted by the Department of Budget & Management	Contact Department of Budget & Management at 410-260-7537 for more information. Baltimore/Annapolis Area	No Cost

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

MFR 220

MANAGING WITH MFR

(1 DAY)

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 Unites
 - 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

MFR 250

IMPROVING BUSINESS PROCESSES TO ACHIEVE OUTCOMES (2 DAYS)

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

**MFR 250 Improving Business
Processes to Achieve Outcomes
(2 Days)**

- 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

MFR 304

DATA ANALYSIS AND MANAGEMENT

USING SPSS

(1 DAY)

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.

- 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.

- 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.

- 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.

- 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

MFR COURSE SCHEDULE

APRIL 2008 – MARCH 2010

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.

MFR 100 - INTRODUCTION TO MANAGING FOR RESULTS (3 DAYS)		
<u>2008</u>	<u>2009</u>	<u>2010</u>
FEBRUARY 19, 20, 21	FEBRUARY 10, 11, 12	JAN 12, 13, 14
JUNE 3, 4, 5	MAY 6, 7, 8	APRIL 7, 8, 9
SEPTEMBER 10, 11, 12	JULY 7, 8, 9	JUNE 22, 23, 24
DECEMBER 9, 10, 11	NOVEMBER 17, 18, 19	SEPTEMBER 14, 15, 16
Additional classes will be scheduled as needed.		
MFR 200 – DEVELOPING STRATEGIC GOALS, OBJECTIVES, AND STRATEGIES (1 DAY)		
TBA		
Classes will be scheduled as needed.		
MFR 201 - MECHANICS OF DEVELOPING PERFORMANCE MEASURES (1 DAY)		
TBA		
Classes will be scheduled as needed.		
MFR 202 - COLLECTING AND INTERPRETING PERFORMANCE DATA (2 DAYS)		
TBA		
Classes will be scheduled as needed.		
MFR 220 – MANAGING WITH MFR (1 DAY)		
TBA		
Classes will be scheduled as needed.		
MFR 250 – IMPROVING BUSINESS PROCESSES TO ACHIEVE OUTCOMES (2 DAYS)		
August 7 & 8, 2008		
Additional classes will be scheduled as needed.		

MFR 300 – ACTIVITY BASED COSTING (2 DAYS)
<p>TBA</p> <p>Classes will be scheduled as needed.</p>
MFR 301 - SURVEYS AND DATA ANALYSIS (2 DAYS)
<p>TBA</p> <p>Classes will be scheduled as needed.</p>
MFR 303 – FACILITATING YOUR AGENCY’S STRATEGIC PLANNING TEAM (1 DAY)
<p>TBA</p> <p>Classes will be scheduled as needed.</p>
MFR 304 - DATA ANALYSIS AND MANAGEMENT USING SPSS (1 DAY)
<p>TBA</p> <p>Classes will be scheduled as needed.</p>
MFR 306 – ANALYZING DATA IN EXCEL (1 DAY)
<p>TBA</p> <p>Classes will be scheduled as needed.</p>
MFR 310 – PREPARING YOUR AGENCY FOR A PERFORMANCE MEASUREMENT AUDIT (1 DAY)
<p>October 9, 2008</p> <p>December 2, 2008</p> <p>Additional classes will be scheduled as needed.</p>
-
<p>TBA</p> <p>Classes will be scheduled as needed.</p>

MFR 316 – MFR REFRESHER (1 DAY)
<p>TBA</p> <p>Classes will be scheduled as needed.</p>
MFR 317 – ENSURING DATA INTEGRITY (1 DAY)
<p>July 10, 2008</p> <p>October 29, 2008</p> <p>Additional classes will be scheduled as needed.</p>
MFR 320 – HOW TO AUDIT YOUR AGENCY’S PERFORMANCE MEASURES: A COURSE FOR INTERNAL AND LEGISLATIVE AUDITORS (1 DAY)
<p>TBA</p> <p>Classes will be scheduled as needed.</p>
MFR 400 – INTEGRATING CQI WITH MFR (1 DAY)
<p>TBA</p> <p>Classes will be scheduled as needed.</p>
MFR 410 – CONTINUOUS IMPROVEMENT FOR PERFORMANCE EXCELLENCE (2 DAYS)
<p>TBA</p> <p>Classes will be scheduled as needed.</p>
MFR 600 – USE OF MFR IN THE FORMULATION OF BUDGET REQUESTS (1 DAY)
<p>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.</p>

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.

Name of Participant ID # (Birth month/day/last 4 digits of social security number)	Agency Name and Agency Address for Participant	Telephone and Fax Number	Attended MFR 100 Prerequisite	
			Yes	No
EMAIL ADDRESS:		Telephone: Fax:		
EMAIL ADDRESS:		Telephone: Fax:		
EMAIL ADDRESS:		Telephone: Fax:		
EMAIL ADDRESS:		Telephone: Fax:		
EMAIL ADDRESS:		Telephone: Fax:		

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

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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

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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.

MFR COURSE COST TABLE		
April 1, 2008 – March 31, 2010		
Course Number and Title	Location	Cost Per Day
MFR 100 INTRODUCTION TO MANAGING FOR RESULTS (3 DAY COURSE) Min. # of Students 15 Max. # of Students 25	University of Baltimore	\$168
	Baltimore Off-Site ⁵	\$168
	Annapolis Off-Site	\$170
	Waldorf, Rocky Gap, Ocean City ⁶	\$198
MFR-200, 3007 AND 4008 LEVEL COURSES 1 DAY COURSES MFR 200, 201, 220, 303, 310, 315, 316, 317, 320 AND 400 2 DAY COURSES MFR 202, 250, 300,301, AND 410 Min. # of Students 10 Max. # of Students 20	University of Baltimore	\$233
	Baltimore Off-Site	\$252
	Annapolis Off-Site	\$254
	Waldorf, Rocky Gap, Ocean City	\$296
MFR 304 AND 306 1 DAY COURSES COMPUTER LAB Min. # of Students 10 Max. # of Students 20	University of Baltimore	\$253
	Baltimore Off-Site	\$252
	Annapolis Off-Site	\$254
	Ocean City, Rocky Gap, Waldorf	\$296
MFR 600 1 DAY COURSE USE OF MFR IN THE FORMULATION OF BUDGET REQUESTS Conducted by the Department of Budget & Management	Contact Department of Budget & Management at 410-260-7537 for more information. Baltimore/Annapolis Area	No Cost

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.