MFR
Training Program

January 2003 – December 2003

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

ROBERT L. EHRlich, Jr.
GOVERNOR

MICHAEL S. STEELE
Lt. GOVERNOR
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Maryland State Government operates under a customer focused management model that includes Managing for Results (MFR). MFR is a strategic planning process that sets organizational direction and priorities, establishes desired program results/outcomes, and measures progress toward achieving those results.

State agencies are embarking on their fifth year of Managing for Results. The training needs of agencies today are different from what they were during the three-year implementation period for MFR. Therefore, the approach to meeting those needs has been modified. The approach now includes:

- A core curriculum of courses provided at the University of Baltimore,
- A series of MFR workshop courses, and
- A consultation and/or facilitation services on-site at the agencies.

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 strongly recommended that agency personnel attend the courses in the core curriculum prior to obtaining consulting and/or facilitation assistance or before attending advanced workshops.

A series of hands-on workshops will also be offered starting this calendar year. These how-to-do-it workshops are designed to allow instructors to work one-on-one with participants. Emphasis is on learning how to apply MFR concepts to real world management problems.

The purpose of consulting, and/or facilitation is to meet needs specific to an agency’s efforts in developing its MFR plan and performance measurement system.

Note:

Additional training courses on the other three components of the Maryland Management Model – Budget, PEP and CQI – may be found in the DBM/Employee Development and Training Institute (EDTI) Course Schedule published for each fiscal year. The inter-relationships among the components of the Management model are included in all training courses for MFR, CQI, and PEP.
The Dept. of Budget & Management and the Schaefer Center for Public Policy at the University of Baltimore have signed an Agreement for provision of consulting services to State agencies on Managing for Results activities and for facilitation of agency strategic planning teams. The Agreement does not include customized training. This Agreement is shown in Exhibit A.

The cost of consulting services is calculated at $105 per hour. The cost of facilitation services is calculated at $200 per hour.

Agencies may obtain these services from the Schaefer Center via Task Orders (see Exhibit A) written against the Agreement.

For additional information, contact Larry Thomas at the Schaefer Center on 410-837-6257 or 410-837-6173.

CUSTOMIZED TRAINING

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

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 Larry Thomas at the Schaefer Center on 410-837-6257 or 410-837-6173.

CONSULTING AND FACILITATION SERVICES
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. This Agreement allows all State agencies to obtain these training services directly from the Schaefer Center without going through a formalized procurement process. This Agreement is shown in Exhibit B.

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. The 500 and 600 level workshops provide the additional benefit of intense hands-on follow-up to the introductory and advanced courses. The limited scope of the subject matter and the limited number of participants (5-6) provides the participants with opportunities to apply learned concepts to real life, agency specific MFR plans, performance measures and surveys. **Participants must complete the MFR 100 - Introduction to Managing for Results training course or an equivalent course - prior to taking the advanced courses (MFR 200, 300 etc.)** See the table of contents for a complete listing of MFR courses offered during the January 2002 through December 2002 period.

**Who should attend MFR training?** MFR training is designed for employees who are involved in strategic planning and performance measurement. 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. The 500 and 600 level workshops are specifically designed for those individuals actively involved in their agency’s MFR plan and performance measures.

**Participation by all agencies in the MFR 100, MFR 200, MFR 201 and MFR 202 courses is strongly encouraged.**
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.

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 Nancy Haynsworth at the Schaefer Center, 410-837-6257, two weeks prior to the start of class.
The cost of each course varies depending on the level and location:

<table>
<thead>
<tr>
<th>Course Number and Title</th>
<th>Location</th>
<th>Cost Per Day</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>MFR 100</strong> INTRODUCTION TO MANAGING FOR RESULTS (3 DAY COURSE)</td>
<td>University of Baltimore</td>
<td>$127</td>
</tr>
<tr>
<td></td>
<td>Baltimore/Annapolis Area*</td>
<td>$136</td>
</tr>
<tr>
<td></td>
<td>Waldorf, Rocky Gap, Ocean City**</td>
<td>$154</td>
</tr>
<tr>
<td><strong>MFR 200, 300 AND 400 LEVEL COURSES</strong></td>
<td>University of Baltimore</td>
<td>$166</td>
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<tr>
<td><strong>1 DAY COURSES</strong></td>
<td>Baltimore/Annapolis Area*</td>
<td>$180</td>
</tr>
<tr>
<td>MFR 201, 220, 303, 305, 310, 320 AND 400</td>
<td>Waldorf, Rocky Gap, Ocean City**</td>
<td>$205</td>
</tr>
<tr>
<td><strong>2 DAY COURSES</strong></td>
<td>University of Baltimore</td>
<td>$256</td>
</tr>
<tr>
<td>MFR 200, 202, AND 301</td>
<td>Baltimore/Annapolis Area*</td>
<td>$228</td>
</tr>
<tr>
<td></td>
<td>Waldorf, Rocky Gap, Ocean City**</td>
<td>$260</td>
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<tr>
<td><strong>MFR 304 DATA ANALYSIS AND MANAGEMENT USING SPSS (1 DAY)</strong></td>
<td>University of Baltimore</td>
<td>$256</td>
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<tr>
<td></td>
<td>Baltimore/Annapolis Area*</td>
<td>$228</td>
</tr>
<tr>
<td></td>
<td>Ocean City, Rocky Gap, Waldorf**</td>
<td>$260</td>
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<tr>
<td><strong>WORKSHOPS</strong></td>
<td>University of Baltimore</td>
<td>$330</td>
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<tr>
<td>MFR 500 LEVEL COURSES (1 DAY)</td>
<td>Baltimore/Annapolis Area*</td>
<td>$364</td>
</tr>
<tr>
<td></td>
<td>Ocean City, Rocky Gap, Waldorf**</td>
<td>$418</td>
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<tr>
<td><strong>MFR 600</strong> USE OF MFR IN THE FORMULATION OF BUDGET REQUESTS (1 DAY)</td>
<td>Contact Mary Connolley at 410-260-7417 for more information.</td>
<td>No Cost</td>
</tr>
</tbody>
</table>

All charges are per person per day.

* All off-site courses assume the agency requesting off-site training provides the facility, equipment, and computer lab if necessary.

** The University of Baltimore incurs additional costs when courses are conducted off-campus.
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 eighteen (18) and the minimum enrollment for MFR-200, 300 and 400 courses is thirteen (13). Classes and workshops without the minimum enrollment will be cancelled no later than 7 days prior to the first day of class.

MFR 500 Workshops are limited to 6 participants. These courses are structured to work with participants on particular projects and cannot be over enrolled.
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, please contact Kathy Gioffre (DBM) on 410-260-7410 or Rachel Monks (DBM) at 410-260-7537 or Nancy Haynsworth (Schaefer Center) at 410-837-6257.

Registration, dates and locations for MFR 600 Use of MFR in the Formulation of Budget Requests are scheduled through DBM. Please contact Mary Connolley at 410-260-7417 to register. The instructor is Mr. David A. Treasure, Deputy Director, DBM. Training will be located in Annapolis.

Agency MFR Coordinators must make every effort to submit registrations as early as possible.

All course dates are open for registration by all agencies. Specific dates have not been reserved for large agencies. If an agency wishes to fill an entire class, they may request the specific date(s) by contacting Nancy Haynsworth at UB on 410-837-6257.
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.

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.
**EVALUATION OF THE TRAINING PROGRAM**

Participants in the training program will be expected to take part in an assessment of each module/workshop, as well as an overall assessment of the entire program. This information will be used to redesign and strengthen the content and format of each training module and the overall program.

A random sample of training program participants will be surveyed every other year over a four-year period. The purpose of these surveys will be to assess Managing for Results training and implementation.

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**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](http://scpp.ubalt.edu), by selecting Managing for Results catalog.

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**COURSE DESCRIPTIONS**

Following is a description of the MFR courses that will be offered from January 2002 through December 2002. 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 classes. 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.

Class Dates for MFR 100
February 20, 21, 27 -2003

Additional classes will be scheduled as needed.
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
(2 DAYS)

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.

Participants must complete the MFR 100 - Introduction to Managing for Results or an equivalent course prior to taking the MFR 200 course.

Class Dates for MFR 200
TBA

Additional classes will be scheduled as needed.
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.

Participants must complete MFR 100 – Introduction to Managing for Results or an equivalent course prior to taking the MFR 201 course.

Class Dates for MFR 201

TBA

Additional classes will be scheduled as needed.
### 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
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.

Participants must complete the MFR 100 - Introduction to Managing for Results or an equivalent course prior to taking the MFR 202 course.

Class Dates for MFR 202

TBA

Additional classes will be scheduled as needed.
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
      1. Techniques of Sampling
      2. Number of Cases Needed
   D. 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.

Class Dates for MFR 220

TBA

Additional classes will be scheduled as needed.
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
   B. Adjusting your Strategies Throughout the Year
   C. Systems for Monitoring Performance
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.

Participants must complete the MFR 100 - Introduction to Managing for Results or an equivalent course prior to taking the MFR 301 course.

Class Dates for MFR 301

TBA

Additional classes will be scheduled as needed.
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.

Participants must complete MFR 100 - Introduction to Managing For Results or an equivalent course prior to taking the MFR 303 course.

Class Dates for MFR 303

TBA

Additional classes will be scheduled as needed.
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 mission, 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.

Class Dates for MFR 304

TBA

Additional classes will be scheduled as needed.
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 305
USING FOCUS GROUPS FOR STRATEGIC PLANNING
(1 DAY)

Focus groups have become a very popular method for obtaining information for strategic planning purposes. Focus groups can be used to improve surveys and other data instruments, understand barriers to effective service delivery, acquire information from stakeholders, assist with environmental assessments, and so forth. However, they are often used incorrectly as a substitute for quantitative data collection. In this class, students will learn to design and implement focus groups appropriately. Topics covered are: differences between quantitative and qualitative data, appropriate uses of focus groups, developing focus group projects, moderating groups and report writing.

Class Dates for MFR 305

TBA

Additional classes will be scheduled as needed.
MFR 305 USING FOCUS GROUPS FOR STRATEGIC PLANNING (1 DAY)

I. Focus Groups: An Overview of the Process

II. Differences between Quantitative and Qualitative Data

III. Appropriate and Inappropriate uses of Focus Groups

IV. Designing the focus Group Project
   1. Developing the question guide
   2. Selecting and recruiting participants
   3. Developing the question guide
   4. Finding appropriate facilities
   5. Video and audio recording of groups

V. Moderating Focus Groups
   1. Selecting a moderator
   2. Moderator responsibilities
   3. Basic moderator traits
   4. Basic moderator skills and concerns
   5. Dealing with problems in the group

VI. Preparing a Focus Group Report
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.

Class Dates for MFR 310

TBA

Additional classes will be scheduled as needed.
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 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.

Class Dates for MFR 320
TBA

Additional classes will be scheduled as needed.
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
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   J. Determining the Certification Category for Each Performance Measure
      1. Certified
      2. Certified with Qualification
      3. Factors Preventing Certification
      4. Inaccurate
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 proposed 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.
6. Introduce some of the tools commonly used in implementing continuous improvement.

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.ubaltt.edu or call 410-837-4965.

Class Dates for MFR 400

March 14

Additional dates will be scheduled as needed.
COURSE OUTLINE

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
MFR 500
ADVANCED WORKSHOP IN
DEVELOPING STRATEGIC GOALS AND
OBJECTIVES
(1 DAY)

This is a one day workshop for persons who wish assistance in developing strategic goals and objectives. Submission of agency, department or program goals and objectives is required two weeks prior to the class for instructor review. Enrollment is limited to six participants or projects per workshop. If you need additional information about the workshop please contact Dr. Larry Thomas at lthomas@ubmail.ubalt.edu.

Strongly recommend that participants complete MFR 100 and MFR 200 prior to enrolling in this module.

Class Dates for MFR 500
TBA

Additional classes will be scheduled as needed.
MFR 501
ADVANCED WORKSHOP IN DEVELOPING STRATEGIES (1 DAY)

This is a one day workshop for persons who wish assistance in developing agency, department or program strategies. Submission of agency, department or program strategies is required two weeks prior to the class for instructor review. Enrollment is limited to six participants or projects per workshop. If you need additional information about the workshop please contact Dr. Larry Thomas at lthomas@ubmail.ubalt.edu.

Strongly recommend that participants complete MFR 100 and MFR 200 prior to enrolling in this module.

Class Dates for MFR 501

TBA

Additional classes will be scheduled as needed.
This is a one-day workshop for persons who wish assistance and facilitation in developing performance measures for their programs. Submission of strategic plans, previously used performance measures and comments on performance measures is required **two weeks prior to the class for instructor review**. Enrollment is limited to six participants (or projects) per workshop. If you need more information about the workshop, please contact Laura Wilson-Gentry at lwgentry@ubmail.ubalt.edu.

**Strongly recommend that participants complete MFR 100 and MFR 201 prior to enrolling in this module.**

*Class Dates for MFR 502*

TBA

Additional classes will be scheduled as needed.
MFR 503
Advanced Workshop in Data Analysis and Collection (1 Day)

This is a one-day workshop for persons who wish assistance and facilitation in developing data collection strategies and analyzing data (except surveys—see below). Submission of strategic plans, previously used performance measures and comments on performance measures is required two weeks prior to the class for instructor review. Enrollment is limited to six participants (or projects) per workshop. If you need more information about the workshop, please contact Laura Wilson-Gentry at lwgentry@ubmail.ubalt.edu.

Strongly recommend that participants complete MFR 100, MFR 201 and MFR 202 prior to enrolling this module.

Class Dates for MFR 503

TBA

Additional classes will be scheduled as needed.
MFR 504
ADVANCED SURVEY WORKSHOP
(1 DAY)

This is a one day workshop for individuals who have existing survey projects and want to improve them. Submission of survey materials -- statement of purpose, definitions of relevant populations, sampling strategies, questionnaire, etc -- is required two weeks prior to the first day of class for instructor review. All workshop participants will spend a day working on these projects. Enrollment is limited to six participants (or projects) per workshop. If you need more information about the open workshop, contact Don Haynes at dhaynes@ubmail.ubalt.edu. Please send a description of your project and contact information.

Strongly recommend that participants complete MFR 301 prior to enrolling this module.

Class Dates for MFR 504

TBA

Additional classes will be scheduled as needed.
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.

Registration, dates and location are scheduled through DBM. Please contact Mary Connolley at 410-260-7417 to register. The instructor is Mr. David A. Treasure, Deputy Director, DBM. 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
<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Dates</th>
<th>Additional Information</th>
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<tbody>
<tr>
<td>MFR 100</td>
<td><strong>INTRODUCTION TO MANAGING FOR RESULTS (3 DAYS)</strong></td>
<td>February 20, 21, 27 - 2003</td>
<td>Additional classes will be scheduled as needed.</td>
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<td>MFR 200</td>
<td><strong>DEVELOPING STRATEGIC GOALS, OBJECTIVES, AND STRATEGIES (2 DAYS)</strong></td>
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<td>Additional classes will be scheduled as needed.</td>
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<td>MFR 201</td>
<td><strong>MECHANICS OF DEVELOPING PERFORMANCE MEASURES (1 DAY)</strong></td>
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<td>MFR 202</td>
<td><strong>COLLECTING AND INTERPRETING PERFORMANCE DATA (2 DAYS)</strong></td>
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<td>Additional classes will be scheduled as needed.</td>
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<td>MFR 220</td>
<td><strong>MANAGING WITH MFR (1 DAY)</strong></td>
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<td>Additional classes will be scheduled as needed.</td>
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<td>MFR 301</td>
<td><strong>SURVEYS AND DATA ANALYSIS (2 DAYS)</strong></td>
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<td>MFR 303</td>
<td><strong>FACILITATING YOUR AGENCY’S STRATEGIC PLANNING TEAM (1 DAY)</strong></td>
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<td>PREPARING YOUR AGENCY FOR A PERFORMANCE MEASUREMENT AUDIT</td>
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<td>HOW TO AUDIT YOUR AGENCY’S PERFORMANCE MEASURES: A COURSE FOR INTERNAL AND LEGISLATIVE AUDITORS</td>
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<td>INTEGRATING CQI WITH MFR</td>
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<td>MFR 500</td>
<td>ADVANCED WORKSHOP IN DEVELOPING STRATEGIC GOALS AND OBJECTIVES</td>
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<td>MFR 503 – Advanced Workshop in Data Analysis and Collection (1 Day)</td>
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<tr>
<td>MFR 600 – Use of MFR in the Formulation of Budget Requests (1 Day)</td>
<td>Registration, dates and location for this course are scheduled through DBM. Please contact Mary Connolley at 410-260-7417 for more information.</td>
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### Schaefer Center for Public Policy - University of Baltimore
### Managing for Results - CY 2003 Registration

**Course # and Date(s):** ________________________________

**MFR Coordinator’s Name:** ________________________________

**Registration Date:** ________________________________

**Coordinator’s Phone Number:** ________________________________

### Table: Registration Details

<table>
<thead>
<tr>
<th>Name of Participant</th>
<th>Agency Name and Agency Address for Participant</th>
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</table>

**All registrations must come through your MFR coordinator.**
MFR INTERAGENCY STEERING COMMITTEE

David A. Treasure, Chairman
Deputy Director
Office of Budget Analysis
Department of Budget and Management
45 Calvert Street
Annapolis, MD 21401
410-260-7049
Fax: 410-974-5634
Dtreas@dbm.state.md.us

The most current roster of the MFR Steering Committee members can be viewed on the Managing for Results page of the DBM Website. The most current roster of the agency MFR Coordinators will also be available on this Website.

Information about the MFR training program may be obtained from staff to the Committee and the Schaefer Center for Public Policy:

Committee Staff

Rachel Monks
Division of Policy Analysis
Department of Budget & Management
45 Calvert Street
Annapolis, MD 21401
410-260-7537
Fax: 410-974-3274
Rachelm@dbm.state.md.us

Kathy Gioffre
Division of Policy Analysis
Department of Budget & Management
45 Calvert Street
Annapolis, MD 21401
410-260-7410
Fax: 410-974-3274
Kathyg@dbm.state.md.us

SCHAEFER CENTER FOR PUBLIC POLICY

Larry W. Thomas, Executive Director
410-837-6173

Ann Cotten, Associate Director
410-837-6188

Nancy Haynsworth, MFR Scheduling Coordinator
410-837-6257

Pam Bishop, Administrative Assistant
410-837-6188

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

Trainers

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

Dr. Dennis McGrath
Dr. Dan Martin
Dr. Tigi Mersha
Dr. Carl Stenberg
Dr. Larry Thomas
Mr. David Treasure
Dr. Laura Wilson-Gentry
INTERAGENCY STEERING COMMITTEE FOR MANAGING FOR RESULTS

David A. Treasure, Chairman  
Deputy Director  
Office of Budget Analysis  
Department of Budget and Management  
45 Calvert Street  
Annapolis, MD 21401  
410-260-7049  
Fax: 410-974-5634  
dtreas@dbm.state.md.us

1. Douglas Wilson  
Director of Administrative Services  
Department of Agriculture  
50 Harry S. Truman Parkway  
Annapolis, MD 21401  
410-841-5881  
Fax: 410-841-5914  
Wilsondh@mda.state.md.us

2. Mary Naramore  
Director  
Division of Policy Analysis  
Department of Budget & Management  
45 Calvert Street  
Annapolis, MD 21401  
410-260-7471  
Fax: 410-974-3274  
maryn@dbm.state.md.us

3. Rachel Monks  
Supervising Program Analyst  
Division of Policy Analysis  
Department of Budget & Management  
45 Calvert Street  
Annapolis, MD 21401  
410-260-7537  
Fax: 410-974-3274  
rachelm@dbm.state.md.us

4. Andrea Sutton  
Statewide CQI Coordinator  
Center for Continuous Quality Improvement  
Department of Budget & Management  
301 W. Preston Street, Room 602  
Baltimore, MD 21201  
410-767-4754  
Fax: 410-333-7207  
asutton@dbm.state.md.us

5. Joanne McCorkle-Smith  
Director  
Employee Development & Training Institute  
Department of Budget & Management  
301 W. Preston Street, Room 308  
Baltimore, MD 21201  
410-767-4028  
Fax: 410-333-5764  
jsmith@dbm.state.md.us

6. Charles Billings  
Managing Director for Ofc. of Admin. Services  
Dept. of Business & Economic Development  
217 E. Redwood Street, Suite 1501  
Baltimore, MD 21202  
410-767-2201  
Fax: 410-767-2031  
cbillings@mdbusiness.state.md.us
7. Dr. Jessie H. Pollack  
Educational Coordinator in Measurement & Statistics  
Division of Professional and Strategic Development  
MD State Department of Education  
200 W. Baltimore Street  
Baltimore, MD 21201  
410-767-0373  
Fax: 410-333-3867  
jpollack@msde.state.md.us

8. Susan Scotto  
Strategic Planning Coordinator  
MD Department of the Environment  
1800 Washington Blvd.  
Baltimore, MD 21230  
410-537-4187  
Fax: 410-537-3888  
sscotto@mde.state.md.us

9. Jackie Thompson  
Chief of Staff  
Department of General Services  
301 W. Preston Street  
Baltimore, MD 21201  
410-767-6263  
Fax: 410-333-5480  
jackie.thompson@dgs.state.md.us

10. Lee Williamson  
Performance Excellence Coordinator  
Dept. of Health and Mental Hygiene  
201 W. Preston Street  
Baltimore, MD 21201  
410-767-5190  
Fax: 410-767-6483  
lwilliamson@dhmh.state.md.us

11. Joan Moore  
Executive Assistant  
Dept. of Housing & Community Development  
100 Community Place  
Crownsville, MD 21032-2023  
410-514-7010  
Fax: 410-987-4070  
moorej@dhcd.state.md.us

12. Susan F. Janczak  
Deputy Secretary  
Planning & Innovation  
Department of Human Resources  
311 W. Saratoga Street  
Baltimore, MD 21201  
410-767-8963  
Fax: 410-333-0637  
sjanczak@dhr.state.md.us

13. James Witherspoon  
Director of Planning  
Office of the Deputy Secretary  
Department of Human Resources  
311 W. Saratoga Street  
Baltimore, MD 21201  
410-767-7427  
Fax: 410-333-0637  
jwithers@dhr.state.md.us

14. Richard Paulman  
Local Director  
Department of Human Resources  
Allegany Co. Dept. of Social Services  
P.O. Box 1420  
1 Frederick Street  
Cumberland, MD 21501-1420  
301-784-7000  
Fax: 301-784-7244  
dpaulman@dhr.state.md.us
15. Lauren Gordon  
Administrator  
Office of Fiscal Planning & Management  
Department of Juvenile Justice  
120 W. Fayette Street  
Baltimore, MD 21201  
410-230-3346  
Fax: 410-333-4193  
gordonl@djj.state.md.us

16. Robert Schult  
Director of Ofc. of Program Analysis & Audit  
Dept. of Labor, Licensing & Regulation  
1100 N. Eutaw Street, Room 605  
Baltimore, MD 21202  
410-767-3274  
Fax: 410-333-5311  
rshult@dllr.state.md.us

17. Lynne B. Porter  
Special Assistant to the Executive Director  
Department of Legislative Services  
90 State Circle, Room 200-B  
Annapolis, MD 21401  
410-946-5218  
Fax: 410-946-5205  
lynne.porter@mlis.state.md.us

18. Steve Powell  
Director of Finance & Admin. Service  
Department of Natural Resources  
580 Taylor Avenue  
Annapolis, MD 21401  
410-260-8032  
Fax: 410-260-8349  
spowell@dnr.state.md.us

19. Barbara Alunans  
Office of the Secretary  
Dept. of Public Safety & Corr. Services  
Suite 400B  
300 E. Joppa Road  
Towson, MD 21286  
410-339-5065  
Fax: 410-339-4227  
balunans@dpscs.state.md.us

20. Captain Martin Knight  
Office of Planning and Research  
Department of State Police  
1201 Reisterstown Road  
Pikesville, MD 21208-3899  
410-653-5610  
Fax: 410-653-4473  
Martyknight@yahoo.com

21. Bruce Gartner  
Budget Manager  
Department of Transportation  
P.O. Box 8755  
BWI Airport, MD 21240-0755  
410-865-1044  
Fax: 410-865-1336  
bgartner@mdot.state.md.us

22. Larry Thomas  
University of Baltimore  
William Donald Schaefer Center  
1420 N Charles Street  
Academic Center  
Baltimore, MD 21201  
410-837-6188  
lthomas@ubalt.edu

23. David Greene  
Maryland MVA  
6601 Ritchie Highway, Room 223  
Glen Burnie, MD 21062  
410-787-7923  
Fax: 410-768-7159  
Dgreene1@mdot.state.md.us
Staff:

Rachel Monks
Supervising Program Analyst
Division of Policy Analysis
Department of Budget & Management
45 Calvert Street
Annapolis, MD  21401
        410-260-7537
Fax: 410-974-3274
rachelm@dbm.state.md.us
Exhibit A

AGREEMENT

This agreement, effective January 1, 2002, 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.

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 on the attached cost table and are considered 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 meet at least quarterly with 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.

9. All classes under this agreement shall be completed by December 31, 2003.

________________________________________  _______________________________________
T. Eloise Foster                            Larry Thomas
Department of Budget & Management           Schaefer Center for Public Policy
University of Baltimore
# Cost Table – CY 2002 Through CY 2003

<table>
<thead>
<tr>
<th>Course Number and Title</th>
<th>Location</th>
<th>Cost Per Day</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>MFR 100</strong>&lt;br&gt;INTRODUCTION TO MANAGING FOR RESULTS (3 DAY COURSE)</td>
<td>University of Baltimore</td>
<td>$127</td>
</tr>
<tr>
<td></td>
<td>Baltimore/Annapolis Area*</td>
<td>$136</td>
</tr>
<tr>
<td></td>
<td>Waldorf, Rocky Gap, Ocean City**</td>
<td>$154</td>
</tr>
<tr>
<td>Min. # of Students 18&lt;br&gt;Max. # of Students 25</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>ALL MFR-200, 300 AND 400 LEVEL COURSES</strong></td>
<td>University of Baltimore</td>
<td>$166</td>
</tr>
<tr>
<td>1 DAY COURSES&lt;br&gt;MFR 201, 220, 303, 305, 310, 320 AND 400</td>
<td>Baltimore/Annapolis Area*</td>
<td>$180</td>
</tr>
<tr>
<td></td>
<td>Waldorf, Rocky Gap, Ocean City**</td>
<td>$205</td>
</tr>
<tr>
<td>Min. # of Students 13&lt;br&gt;Max. # of Students 20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 DAY COURSES&lt;br&gt;MFR 200, 202, AND 301</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>MFR 304 DATA ANALYSIS AND MANAGEMENT USING SPSS (1 DAY)</strong></td>
<td>University of Baltimore</td>
<td>$256</td>
</tr>
<tr>
<td></td>
<td>Baltimore/Annapolis Area*</td>
<td>$228</td>
</tr>
<tr>
<td></td>
<td>Ocean City, Rocky Gap, Waldorf**</td>
<td>$260</td>
</tr>
<tr>
<td>Min. # of Students 10&lt;br&gt;Max. # of Students 20</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>WORKSHOPS</strong>&lt;br&gt;MFR 500 LEVEL COURSES&lt;br&gt;(1 DAY)</td>
<td>University of Baltimore</td>
<td>$330</td>
</tr>
<tr>
<td></td>
<td>Baltimore/Annapolis Area*</td>
<td>$364</td>
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<td></td>
<td>Ocean City, Rocky Gap, Waldorf**</td>
<td>$418</td>
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<tr>
<td>Min. # of Students 6&lt;br&gt;Max. # of Students 6</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>MFR 600</strong>&lt;br&gt;USE OF MFR IN THE FORMULATION OF BUDGET REQUESTS (1 DAY)**</td>
<td></td>
<td>No Cost</td>
</tr>
</tbody>
</table>

All charges are per person per day.

* All off-site courses assume the agency requesting off-site training provides the facility, equipment, and computer lab if necessary.

** The University of Baltimore incurs additional costs when courses are conducted off-campus.
Exhibit B

AGREEMENT

This agreement effective January 1, 2003 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 consulting assistance and facilitation services to State agencies on the Maryland Managing for Results Initiative in accordance with the MFR Guidebook.

2. The Contractor shall provide services when requested by the State agencies. State agencies will contact the Contractor directly to arrange for provision of services. The requesting agency will appoint a Task Order Manager who will be the point of contact between the Contractor and the requesting agency.

3. When services are requested by a State agency, a Task Order shall be developed by the Task Order manager in the requesting agency that specifies the services to be provided, the estimated hours of service required, and a "not to exceed" dollar amount. The State agency and the Contractor will sign this Task Order. The Contractor agrees not to exceed the dollar limits specified in each Task Order without prior written approval from the State agency. A sample Task Order is included with this Agreement.

4. The Contractor agrees to handle all administrative support functions for all consulting and facilitation services provided. This includes billing for services rendered.

5. The Contractor will charge agencies $105 per hour for MFR consulting services by faculty and research associates of the University of Baltimore. Consultation services include, but are not limited to, critiquing, writing, and evaluating strategic plans, reviewing or developing performance measures, preparing written documentation, and meeting with agency representatives to work on strategic planning and performance measurement issues. The $105 hourly fee will be billed for both preparation and contact hours. Contact hours are those during which the Contractor provides direct consulting services to a State agency in connection with MFR consulting services. These fees are inclusive of associated basic consulting equipment, supplies, and expenses. Special materials will be charged on a reimbursement basis.

6. The Contractor will charge agencies $200 per hour for facilitation of agency planning teams by faculty and research associates of the University of Baltimore. Facilitation services are defined as time spent working with a group to guide them in the development, refinement, or completion of a work product such as mission statement, vision, values, goals, objectives, and performance measures. Facilitation differs from consulting in that facilitation is work with a group to help the group reach consensus about what the mission, vision, goals, and objectives ought to be; while consulting is more of a technical activity focused on critiquing what an agency has prepared, or providing technical assistance with producing a written work product. The $200 hourly fee will be billed for contact hours only. Contact hours are those during which the Contractor provides direct facilitation services to State agency planning teams in connection with facilitation services. Preparation hours will be billed at $105 per hour. These fees are inclusive of associated basic facilitator equipment, facilitation support personnel, supplies, and expenses. Special materials will be charged on a reimbursement basis.

7. The Contractor will charge agencies $21 per hour for support work by graduate students.
8. The Contractor is not entitled to any additional charge for travel in the Baltimore – Annapolis corridor. Expenses incurred by the Contractor for travel outside the Baltimore – Annapolis area will be reimbursed by the State agency in accordance with State travel reimbursement policies. Any costs for meeting sites shall be the responsibility of the requesting State agency.

9. The Contractor will bill agencies directly for payment of all fees. Agencies will make payments directly to the Contractor. The Contractor will render bills as provided for in the signed Task Orders.

10. The total amount paid to the Contractor for all Task Orders issued under this Agreement shall not exceed $80,000 without prior written approval from the Secretary of the Department.

11. The Contractor will provide to the Department cumulative quarterly reports which provide the number of hours, obligated amounts, paid amounts to date and Task Order closed dates for each agency, as well as total obligated and paid amounts overall for the State. In addition, the Contractor will provide to the Department copies of all task orders written and signed for services under this Agreement, and copies of all invoices for services rendered under this Agreement. The Contractor will provide this information separately for consulting and facilitation services.

12. This Agreement shall expire on December 31, 2004.

13. This Agreement does not preclude State agencies from negotiating separate agreements with the Contractor for provision of facilitation or consulting services or from using other Contractors to provide similar services.

T. Eloise Foster
Department of Budget & Management

Larry Thomas
Schaefer Center for Public Policy
University of Baltimore

Date: __________________________

Date: __________________________
**TASK ORDER FOR CONSULTING SERVICES**

To be provided to (Agency name and program name): ________________________________

Account Number (to be provided by UB): ________________________________

<table>
<thead>
<tr>
<th>List below the nature of consulting services and who will perform them</th>
<th># CONTACT HOURS</th>
<th>CONTACT COST AT $105/HR</th>
<th># PREP HOURS</th>
<th>PREP COST AT $105/HR</th>
<th>TOTAL COST</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>List below support work to be performed by graduate student(s):</th>
<th># CONTACT HOURS</th>
<th>CONTACT COST AT $21/HR</th>
<th># PREP HOURS</th>
<th>PREP COST AT $21/HR</th>
<th>TOTAL COST</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

**GRAND TOTAL:**

The total cost of services rendered under this task order is not to exceed $ ________________.

Services under this Task Order are to be completed no later than ____________________________.

Authorizing Signatures:

Name of Authorizer
Agency Name

Name of Task Order Manager
Agency Name

Larry Thomas
Schaefer Center Public Policy
University of Baltimore

Date: __________________ Date: __________________ Date: __________________

Consulting Task Order 2003-2004
**TASK ORDER FOR FACILITATION SERVICES**

To be provided to (Agency name and program name): ________________________________

Account Number (to be provided by UB): ______________________________

**List below the nature of facilitation services and who will perform them**

<table>
<thead>
<tr>
<th>#</th>
<th>CONTACT HOURS</th>
<th>CONTACT COST AT $200/HR</th>
<th># PREP HOURS</th>
<th>PREP COST AT $105/HR</th>
<th>TOTAL COST</th>
</tr>
</thead>
</table>

**List below support work to be performed by graduate student(s):**

<table>
<thead>
<tr>
<th>#</th>
<th>CONTACT HOURS</th>
<th>CONTACT COST AT $21/HR</th>
<th># PREP HOURS</th>
<th>PREP COST AT $21/HR</th>
<th>TOTAL COST</th>
</tr>
</thead>
</table>

**GRAND TOTAL:**

The total cost of services rendered under this task order is not to exceed $______________.

Services under this Task Order are to be completed no later than __________________________.

Authorizing Signatures:

______________________     ___________________ __________________________
Name of Authorizer   Name of Task Order Manager      Larry Thomas
Agency Name   Agency Name             Schaefer Center for Public Policy
University of Baltimore

Date:____________________ Date:____________________ Date:____________________

Facilitation Task Order 2003-2004