MANAGING FOR RESULTS
TRAINING PROGRAM

January 2004 – December 2005

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
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>BACKGROUND</td>
<td>1</td>
</tr>
<tr>
<td>CUSTOMIZED TRAINING</td>
<td>2</td>
</tr>
<tr>
<td>CONSULTING AND FACILITATION SERVICES</td>
<td>2</td>
</tr>
<tr>
<td>CORE CURRICULUM</td>
<td>3</td>
</tr>
<tr>
<td>CLASS SCHEDULE</td>
<td>3</td>
</tr>
<tr>
<td>TRAINING LOCATIONS AND PARKING</td>
<td>4</td>
</tr>
<tr>
<td>CLASS SIZE AND MINIMUM ENROLLMENT REQUIREMENTS</td>
<td>4</td>
</tr>
<tr>
<td>COURSE COST</td>
<td>5</td>
</tr>
<tr>
<td>PAYMENT</td>
<td>6</td>
</tr>
<tr>
<td>REGISTRATION</td>
<td>6</td>
</tr>
<tr>
<td>WEATHER CANCELLATION POLICY</td>
<td>7</td>
</tr>
<tr>
<td>POLICY ON SUBSTITUTION, RESCHEDULING AND CANCELLATION</td>
<td>7</td>
</tr>
<tr>
<td>EVALUATION OF THE TRAINING PROGRAM</td>
<td>8</td>
</tr>
<tr>
<td>OBTAINING ADDITIONAL COPIES OF THE CATALOG</td>
<td>8</td>
</tr>
<tr>
<td>COURSE DESCRIPTIONS</td>
<td>8</td>
</tr>
<tr>
<td>MFR 100 - INTRODUCTION TO MANAGING FOR RESULTS</td>
<td>9</td>
</tr>
<tr>
<td>MFR 200 - DEVELOPING STRATEGIC GOALS, OBJECTIVES, &amp; STRATEGIES</td>
<td>15</td>
</tr>
<tr>
<td>MFR 201 - MECHANICS OF DEVELOPING PERFORMANCE MEASURES</td>
<td>17</td>
</tr>
<tr>
<td>MFR 202 - COLLECTING AND INTERPRETING PERFORMANCE DATA</td>
<td>19</td>
</tr>
<tr>
<td>MFR 220 - MANAGING WITH MFR</td>
<td>21</td>
</tr>
<tr>
<td>MFR 300 - ACTIVITY BASED COSTING</td>
<td>23</td>
</tr>
<tr>
<td>MFR 301 - SURVEYS AND DATA ANALYSIS</td>
<td>25</td>
</tr>
<tr>
<td>MFR 303 - FACILITATING YOUR AGENCY’S STRATEGIC PLANNING TEAM</td>
<td>27</td>
</tr>
<tr>
<td>MFR 304 - DATA ANALYSIS AND MANAGEMENT USING SPSS</td>
<td>29</td>
</tr>
<tr>
<td>MFR 306 - ANALYZING DATA IN EXCEL</td>
<td>31</td>
</tr>
<tr>
<td>MFR 310 - PREPARING YOUR AGENCY FOR A PERFORMANCE MEASUREMENT AUDIT</td>
<td>33</td>
</tr>
<tr>
<td>MFR 315 - PERFORMANCE BUDGETING</td>
<td>35</td>
</tr>
<tr>
<td>MFR 316 - MFR REFRESHER</td>
<td>37</td>
</tr>
<tr>
<td>MFR 317 - ENSURING DATA INTEGRITY</td>
<td>39</td>
</tr>
<tr>
<td>MFR 320 - HOW TO AUDIT AN AGENCY’S PERFORMANCE MEASURES:</td>
<td>41</td>
</tr>
<tr>
<td>A Course for Internal and Legislative Auditors</td>
<td>41</td>
</tr>
<tr>
<td>MFR 400 - INTEGRATING CQI WITH MFR</td>
<td>43</td>
</tr>
<tr>
<td>MFR 410 - CONTINUOUS IMPROVEMENT FOR PERFORMANCE EXCELLENCE</td>
<td>45</td>
</tr>
<tr>
<td>MFR 600 - USE OF MFR IN THE FORMULATION OF BUDGET REQUESTS</td>
<td>46</td>
</tr>
<tr>
<td>Section</td>
<td>Page</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>MFR Course Schedule</td>
<td>48</td>
</tr>
<tr>
<td>Course Registration Form</td>
<td>51</td>
</tr>
<tr>
<td>MFR Interagency Steering Committee and Staff</td>
<td>52</td>
</tr>
<tr>
<td>Schaefer Center Staff and Trainers</td>
<td>52</td>
</tr>
<tr>
<td>MFR Interagency Steering Committee Roster</td>
<td>53</td>
</tr>
<tr>
<td>Exhibits</td>
<td></td>
</tr>
<tr>
<td>Exhibit A – Interagency Agreement for Training</td>
<td>56</td>
</tr>
<tr>
<td>Exhibit B – Interagency Agreement for Consulting &amp; Facilitation</td>
<td>58</td>
</tr>
<tr>
<td>Exhibit B - (continued) Task Order for Consulting Services</td>
<td>60</td>
</tr>
<tr>
<td>Exhibit B - (continued) Task Order for Facilitation Services</td>
<td>61</td>
</tr>
</tbody>
</table>
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.

The MFR training program includes:

- A core curriculum of courses provided at the University of Baltimore, and
- 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 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.**

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.

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 each fiscal year. The inter-relationships among the components of the Maryland 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 (shown in Exhibit B). The Agreement does not include customized training.

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 Ann Cotten at the Schaefer Center on 410-837-6257 or 410-837-6185.

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.
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 in Exhibit A). 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 (MFR 200, 300 etc.) See the table of contents for a complete listing of MFR courses offered during the January 2004 through December 2005 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.

All agencies should participate at a minimum in the MFR 100, MFR 200, MFR 201 and MFR 202 courses.

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 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 and workshops without the minimum enrollment will be cancelled no later than 7 days prior to the first day 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>MFR 100 \n<strong>INTRODUCTION TO MANAGING FOR RESULTS</strong> \n(3 DAY COURSE)</td>
<td>University of Baltimore, Baltimore/Annapolis Area*</td>
<td>$127</td>
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<tr>
<td></td>
<td>Waldorf, Rocky Gap, Ocean City**</td>
<td>$154</td>
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<tr>
<td>Min. # of Students</td>
<td>15</td>
<td></td>
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<tr>
<td>Max. # of Students</td>
<td>25</td>
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<tr>
<td>All MFR-200, 300 and 400 Level Courses</td>
<td></td>
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</tr>
<tr>
<td>1 Day Courses MFR 200, 201, 220, 303, 310, 315, 316, 317, 320 AND 400</td>
<td>University of Baltimore, Baltimore/Annapolis Area*</td>
<td>$166</td>
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<tr>
<td></td>
<td>Waldorf, Rocky Gap, Ocean City**</td>
<td>$205</td>
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<tr>
<td>Min. # of Students</td>
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<td></td>
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<tr>
<td>Max. # of Students</td>
<td>20</td>
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<tr>
<td>2 Day Courses MFR 202, 300, 301 AND 410</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MFR 304 and MFR 306 \n(1 DAY) Computer Lab Courses</td>
<td>University of Baltimore, Baltimore/Annapolis Area*</td>
<td>$256</td>
</tr>
<tr>
<td></td>
<td>Ocean City, Rocky Gap, Waldorf**</td>
<td>$260</td>
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<tr>
<td>Min. # of Students</td>
<td>10</td>
<td></td>
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<tr>
<td>Max. # of Students</td>
<td>20</td>
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<td>MFR 600 \n<strong>USE OF MFR IN THE FORMULATION OF BUDGET REQUESTS</strong> \n(1 DAY)</td>
<td>Contact Delterese George at 410-260-7274 for more information, Baltimore/Annapolis Area*</td>
<td>No Cost</td>
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</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.
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 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 Delterese George at 410-260-7274 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 prior to the first day of class.**

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.**

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**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.
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.
Participants in the training program will be expected to take part in an assessment of each course, 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.

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

Following is a description of the MFR courses that will be offered from January 2004 through December 2005. 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.

Class Dates for MFR 100

January 26, 27, February 3, 2004
March 8, 9, 16, 2004
May 11, 12, 19, 2004

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
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
February 11, 2004

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
February 26, 2004

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
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.

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

April 13, 20, 2004

Additional classes will be scheduled as needed.
MFR 202 Collecting and Interpreting Performance Data
(2 Days)
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

March 4, 2004

Additional classes will be scheduled as needed.
MFR 220 MANAGING WITH MFR
(1 DAY)

I. Maryland’s Management Model
   A. Managing for Results
   B. Performance Evaluation Process
   C. Continuous Quality Improvement

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

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

IV. Monitoring MFR Performance Measures
   A. Continuous Performance Measurement Monitoring as Key to
      Managing Program and Resources
   B. Adjusting your Strategies Throughout the Year
   C. Systems for Monitoring Performance
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.

Class Dates for MFR 300

April 14, 21, 2004

Additional classes will be scheduled as needed.
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
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.
MFR 301  SURVEYS AND DATA ANALYSIS
(2 DAYS)
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 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.

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 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, 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.

Class Dates for MFR 306

February 23, 2004
May 10, 2004

Additional classes will be scheduled as needed.
# Course Outline

<table>
<thead>
<tr>
<th>Section</th>
<th>Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td>I.</td>
<td>Data Concepts</td>
</tr>
<tr>
<td>II.</td>
<td>Levels of measurement</td>
</tr>
<tr>
<td>III.</td>
<td>Sampling and sample error</td>
</tr>
<tr>
<td>IV.</td>
<td>Choosing and Using Measures of Central Tendency (mean, median, modal value)</td>
</tr>
<tr>
<td>V.</td>
<td>Choosing and Using Measures of Dispersion (range, interquartile range, variance, standard deviation)</td>
</tr>
<tr>
<td>VI.</td>
<td>Understanding the limits of generalization (margins of error, standard error of the mean)</td>
</tr>
<tr>
<td>VII.</td>
<td>Building Crosstab Tables (correctly percentaging and analyzing tables)</td>
</tr>
<tr>
<td>VIII.</td>
<td>Determining statistical significance</td>
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</tbody>
</table>

**MFR 306 Analyzing Data in Excel**

*(1 Day)*
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

February 5, 2004

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 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.

Class Dates for MFR 315

February 18, 2004

Additional classes will be scheduled as needed.
MFR 315 PERFORMANCE BUDGETING
(1 DAY)

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.

*Class Dates for MFR 316*

March 18, 2004  
May 6, 2004  

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

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>I.</td>
<td>Overview of the MFR strategic planning and management framework</td>
</tr>
<tr>
<td>II.</td>
<td>Fitting it all together: mission, vision, values, goals, objectives, and performance measures</td>
</tr>
<tr>
<td>III.</td>
<td>Integrating strategic planning throughout your agency</td>
</tr>
<tr>
<td>IV.</td>
<td>Objectives and performance measures: externally reported and internally monitored measures</td>
</tr>
<tr>
<td>V.</td>
<td>The importance of regular performance measurement and monitoring</td>
</tr>
<tr>
<td>VI.</td>
<td>Data integrity: The key to a reliable performance monitoring system</td>
</tr>
<tr>
<td>VII.</td>
<td>Methods for ensuring data integrity</td>
</tr>
</tbody>
</table>
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.

Class Dates for MFR 317

April 27, 2004

Additional classes will be scheduled as needed.
MFR 317 Ensuring Data Integrity

(1 Day)

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.

Class Dates for MFR 320

June 9, 2004

Additional classes will be scheduled as needed.
MFR 320 HOW TO AUDIT AN AGENCY’S PERFORMANCE MEASURES: A COURSE FOR INTERNAL AND LEGISLATIVE AUDITORS

(1 DAY)

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.

Class Dates for MFR 400
TBA

Additional dates will be scheduled as needed.
MFR 400 INTEGRATING CQI WITH MFR (1 DAY)

I. Introduction
II. CQI Implementation as a Change Management System
III. Linking MFR and CQI
IV. Basic Requirements for Successful Implementation of CQI
V. The Continuous Improvement Process
VI. Toolkit for Continuous Improvement
VII. Proposed Duration of the Training

COURSE OUTLINE
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.

Class Dates for MFR 410

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.

Class Dates for MFR 600

March 1, 2004
April 29, 2004

Additional classes will be scheduled as needed.

Registration, dates and location are scheduled through DBM. Please contact Delterese George at 410-260-7274 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
# MFR Course Schedule

**January 2004 – December 2005**

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Schedule</th>
<th>Additional Classes</th>
</tr>
</thead>
<tbody>
<tr>
<td>MFR 100</td>
<td>Introduction to Managing for Results (3 Days)</td>
<td>January 26, 27, February 3, 2004; March 8, 9, 16, 2004; May 11, 12, 19, 2004</td>
<td>Additional classes will be scheduled as needed.</td>
</tr>
<tr>
<td>MFR 200</td>
<td>Developing Strategic Goals, Objectives, and Strategies (1 Day)</td>
<td>February 11, 2004</td>
<td>Additional classes will be scheduled as needed.</td>
</tr>
<tr>
<td>MFR 201</td>
<td>Mechanics of Developing Performance Measures (1 Day)</td>
<td>February 26, 2004</td>
<td>Additional classes will be scheduled as needed.</td>
</tr>
<tr>
<td>MFR 202</td>
<td>Collecting and Interpreting Performance Data (2 Days)</td>
<td>April 13, 20, 2004</td>
<td>Additional classes will be scheduled as needed.</td>
</tr>
<tr>
<td>MFR 220</td>
<td>Managing with MFR (1 Day)</td>
<td>March 4, 2004</td>
<td>Additional classes will be scheduled as needed.</td>
</tr>
<tr>
<td>MFR 300</td>
<td>Activity Based Costing (2 Days)</td>
<td>April 14, 21, 2004</td>
<td>Additional classes will be scheduled as needed.</td>
</tr>
<tr>
<td>MFR 301</td>
<td>Surveys and Data Analysis (2 Days)</td>
<td>TBA</td>
<td>Additional classes will be scheduled as needed.</td>
</tr>
<tr>
<td>MFR 303</td>
<td>Facilitating Your Agency’s Strategic Planning Team (1 Day)</td>
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<td></td>
</tr>
<tr>
<td>Course Code</td>
<td>Course Title and Description</td>
<td></td>
<td></td>
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<tr>
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</tr>
<tr>
<td>TBA</td>
<td>Additional classes will be scheduled as needed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MFR 304 - DATA ANALYSIS AND MANAGEMENT USING SPSS (1 DAY)</td>
<td>TBA</td>
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<tr>
<td></td>
<td>Additional classes will be scheduled as needed.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| MFR 306 – ANALYZING DATA IN EXCEL (1 DAY) | February 23, 2004  
May 10, 2004 |
|             | Additional classes will be scheduled as needed. |
| MFR 310 – PREPARING YOUR AGENCY FOR A PERFORMANCE MEASUREMENT AUDIT (1 DAY) | February 5, 2004 |
|             | Additional classes will be scheduled as needed. |
| MFR 315 – PERFORMANCE BUDGETING (1 DAY) | February 18, 2004 |
|             | Additional classes will be scheduled as needed. |
| MFR 316 – MFR REFRESHER (1 DAY) | March 18, 2004  
May 6, 2004 |
|             | Additional classes will be scheduled as needed. |
| MFR 317 – ENSURING DATA INTEGRITY (1 DAY) | April 27, 2004 |
|             | Additional classes will be scheduled as needed. |
**MFR 320 – How to Audit Your Agency’s Performance Measures: A Course for Internal and Legislative Auditors (1 Day)**

- **June 9, 2004**
- Additional classes will be scheduled as needed.

**MFR 400 – Integrating CQI with MFR (1 Day)**

- **TBA**
- Additional classes will be scheduled as needed.

**MFR 410 – Continuous Improvement for Performance Excellence (2 Days)**

- **TBA**
- Additional classes will be scheduled as needed.

**MFR 600 – Use of MFR in the Formulation of Budget Requests (1 Day)**

- **March 1, 2004**
- **April 29, 2004**

Registration, dates and location for this course are scheduled through DBM. Please contact Delterese George at 410-260-7274 for more information.
Schaefer Center for Public Policy - University of Baltimore  
Managing for Results - CY 2004 – 2005 Registration Form

Course # and Date(s):__________________________________   MFR Coordinator’s Name: ________________________________  
Registration Date:_____________________________________   Coordinator’s Phone Number: ____________________________  

**ALL REGISTRATIONS MUST COME THROUGH YOUR MFR COORDINATOR.**

<table>
<thead>
<tr>
<th>Name of Participant ID # (Birth month/day/last 4 digits of social security number)</th>
<th>Agency Name and Agency Address for Participant</th>
<th>Telephone and Fax Number</th>
<th>Attended MFR 100 Prerequisite</th>
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<td>EMAIL ADDRESS:</td>
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<td>Telephone:</td>
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</tr>
<tr>
<td>EMAIL ADDRESS:</td>
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<td>Fax:</td>
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<tr>
<td>EMAIL ADDRESS:</td>
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<tr>
<td>EMAIL ADDRESS:</td>
<td></td>
<td>Fax:</td>
<td></td>
</tr>
</tbody>
</table>

54
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 is also 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

SCHAEFER CENTER FOR PUBLIC POLICY

Ann Cotten, Director
410-837-6185
Mary Lovegrove, Assistant Director
410-837-6188

Nancy Haynsworth, MFR Scheduling Coordinator Pam Bishop, Administrative Assistant
410-837-6257
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. Dennis McGrath
Dr. Dan Martin
Dr. Tigi Mersha
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
410-841-5855
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. 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
jmmsmith@dbm.state.md.us
5. 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

6. Ann Cotten  
Director  
University of Baltimore  
William Donald Schaefer Center  
1304 St. Paul Street  
Baltimore, MD 21201  
410-837-6188  
Fax: 410-837-6175  
acotten@ubalt.edu

7. Dr. Jessie H. Pollack  
Educational Coordinator in Measurement & Statistics  
Division for Leadership 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  
sscott@md.state.md.us

9. Anne Hubbard  
Director of External Affairs  
Department of General Services  
301 W. Preston Street  
Baltimore, MD 21201  
410-767-4606  
Fax: 410-333-5480  
anne.hubbard@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: 410-333-5958  
lwilliamson@dhmh.state.md.us

11. Debbie Watts  
Executive Assistant  
Dept. of Housing & Community Development  
100 Community Place  
Crownsville, MD 21032-2023  
410-514-7003  
Fax: 410-514-7928  
Watts@dhcd.state.md.us

12. Elizabeth Seale  
Deputy Secretary of Office for Planning  
Department of Human Resources  
Office of the Secretary  
311 W. Saratoga Street  
Baltimore, MD 21201  
410-767-7123  
Fax: 410-333-0637  
esea@dhr.state.md.us
13. James Witherspoon  
   Director of Planning  
   Office of the Deputy Secretary of Planning  
   Department of Human Resources  
   311 W. Saratoga Street, Suite 270  
   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 Research & Planning  
   Department of Juvenile Services  
   120 W. Fayette Street  
   Baltimore, MD 21201  
   410-230-3346  
   Fax: 410-333-4193  
   gordonl@djs.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  
   rschult@dllr.state.md.us

17. Lynne B. Porter  
   Executive 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. Robert Gibson  
   Director for Planning & Statistics  
   Dept. of Public Safety & Corr. Services  
   Suite 1001  
   300 E. Joppa Road  
   Towson, MD 21286  
   410-339-5021  
   Fax: 410-339-4227  
   rgibson@dpscs.state.md.us

20. Leigh Maddox  
   Office of Planning and Research Division  
   Department of State Police  
   1201 Reisterstown Road  
   Pikesville, MD 21208-3899  
   410-653-4400  
   Fax: 410-653-4250  
   lmaddox@mdsp.org
21. Fran Karns  
Policy & Fiscal Analyst  
Department of Transportation  
7201 Corporate Center Drive  
Hanover, MD  21076  
410-865-1057  
Fax: 410-865-1032  
fkarns@mdot.state.md.us

22. 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
EXHIBIT A
MFR TRAINING AGREEMENT

This agreement, effective January 15, 2004, 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 the agreement. This data is to be provided to Rachel Monks, Supervising Program Analyst, Division of Policy Analysis, using the attached report format that is part of this agreement.

9. The Contractor agrees to meet periodically as needed 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.

10. All classes under this agreement shall be completed by January 14, 2006.

James C. DiPaula, Secretary
Department of Budget & Management

Laurence Katz, J.D., Interim Provost
University of Baltimore
# Cost Table for CY 2004 through CY 2005

<table>
<thead>
<tr>
<th>Course Number and Title</th>
<th>Location</th>
<th>Cost Per Day</th>
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<tbody>
<tr>
<td><strong>MFR 100</strong> INTRODUCTION TO MANAGING FOR RESULTS (3 DAY COURSE)</td>
<td>University of Baltimore</td>
<td>$127</td>
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<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>
</tr>
<tr>
<td><strong>1 DAY COURSES</strong> MFR 200, 201, 220, 303, 310, 315, 316, 317, 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>
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<tr>
<td><strong>2 DAY COURSES</strong> MFR 202, 300,301, AND 410**</td>
<td>University of Baltimore</td>
<td>$256</td>
</tr>
<tr>
<td></td>
<td>Baltimore/Annapolis Area*</td>
<td>$228</td>
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<tr>
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<td>Ocean City, Rocky Gap, Waldorf**</td>
<td>$260</td>
</tr>
<tr>
<td><strong>MFR 304 AND 306 (1 DAY) COMPUTER LAB COURSES</strong></td>
<td>University of Baltimore</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Baltimore/Annapolis Area*</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ocean City, Rocky Gap, Waldorf**</td>
<td></td>
</tr>
<tr>
<td><strong>MFR 600</strong> USE OF MFR IN THE FORMULATION OF BUDGET REQUESTS (1 DAY)</td>
<td>Contact Delterese George at 410-260-7274 for more information.</td>
<td>No Cost</td>
</tr>
<tr>
<td></td>
<td>Baltimore/Annapolis Area</td>
<td></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 necessary.
- The University of Baltimore incurs additional costs when courses are conducted off-campus.
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. Preparation hours will be billed at $105 per hour. 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                                          Larry Thomas
Department of Budget & Management                      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>TASK</th>
<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>
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</table>

<table>
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<tr>
<th>CONTACT</th>
<th>HOURS</th>
<th>CONTACT</th>
<th>HOURS</th>
<th>PREP</th>
<th>HOURS</th>
<th>PREP</th>
<th>HOURS</th>
<th>TOTAL</th>
<th>COST</th>
</tr>
</thead>
</table>

<table>
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<tr>
<th>TASK</th>
<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>
</table>

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<tr>
<th>CONTACT</th>
<th>HOURS</th>
<th>CONTACT</th>
<th>HOURS</th>
<th>PREP</th>
<th>HOURS</th>
<th>PREP</th>
<th>HOURS</th>
<th>TOTAL</th>
<th>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 __________________________
Agency Name __________________________

Name of Task Order Manager __________________________
Agency Name __________________________

Laurence Katz, J.D.
Interim Provost
University of Baltimore

Date:___________________ Date:___________________ Date:_________________
TASK ORDER FOR FACILITATION SERVICES

To be provided to (Agency name and program name): _______________________________
Account Number (to be provided by UB): ______________________________

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      Laurence Katz, J.D.
Agency Name   Agency Name        Interim Provost
University of Baltimore

<table>
<thead>
<tr>
<th>List below the nature of facilitation services and who will perform them</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>
<tbody>
<tr>
<td>List below support work to be performed by graduate student(s):</td>
<td># CONTACT HOURS</td>
<td>CONTACT COST AT $21/HR</td>
<td># PREP HOURS</td>
<td>PREP COST AT $21/HR</td>
<td>TOTAL COST</td>
</tr>
</tbody>
</table>
Facilitation Task Order 2003-2004