The Performance Institute

Program Evaluation *for* Managers

Set, Monitor and Evaluate Program Goals with a Performance Management Mindset

November 29–30, 2012
Washington, DC

LINK Program Evaluation to Performance Goals

Understand the relationship of performance measurement and program evaluation under GPRA and OMB initiatives

APPLY the Logic Model to Enhance Program Evaluation Readiness and Capacity

Recognize the key program outputs and outcomes that will help align and prepare your programs for evaluation

INSPIRE Your Agency to Track Performance and Increase Evaluation Capacity

Use proven processes to increase your organization's ability to produce relevant data

In Association with:

ASMI
American Strategic Management Institute

Earn up to 12 CPE Credits!

PerformanceInstitute.org/evaluation

Dear Colleague,

"Why should program evaluation matter to government leaders?" This may be the question you are asking yourself as you consider the challenges of declining resources and multiplying priorities. The answer is simple; program evaluation is the most underused and misunderstood companion to performance management and those public sector managers that often overlook this capacity will not achieve the same successes as those that fully embrace and utilize it. Program evaluation provides managers, from the project level to the agency level with the key processes and tools to highlight successes, pinpoint deficiencies, and shape decisions for essential programs and functions through critical and essential feedback.

This course has been designed for you, the "consumer" of the evaluation, in mind. Together, we will tackle the benefits and challenges of program evaluation and performance management as they contribute to organizational success. In doing so, we will examine the four phases of evaluation from design and data collection to analysis and evaluation/reporting as they relate to you and your role as a steward of the public's funds and trust. Various hands-on exercises will help you to define researchable questions, develop a program logic model, better manage evaluation projects and generate support for or overcome resistance to evaluation in your organization. You will undoubtedly walk away with the concrete and essential knowledge and skills to build a better evaluation capacity and readiness for your programs after this course.

Join us in Washington, DC for a highly interactive and informative workshop as we work together in understanding and working with program evaluation to bolster performance management and measurement in the public sector.

We look forward to seeing you there!

Sincerely,



Ted Kniker
Executive Director, The Performance Institute

☛ This course most benefits those who are looking to improve their knowledge, skills and confidence to develop evaluations and increase their organization's evaluation capacity.

You Will Learn To:

1. **INTEGRATE** and utilize program evaluation as a key companion to advancing performance management in your agency
2. **ALIGN** and assess evaluation goals between evaluators and managers by defining the key researchable questions that drive evaluation and performance management
3. **IMPROVE** and review performance with insight into program theory, controllable factors, external influence, and feedback on program results
4. **ANTICIPATE** and prepare for the challenges you may face in integrating and utilizing evaluation findings
5. **ENGAGE** and take part in hands-on activities that will help you build an evaluation mindset and capacity in your agency for improved program performance

Who Should Attend:

- ✓ Program Managers
- ✓ Project Managers
- ✓ Division Managers
- ✓ Program Planners
- ✓ Strategic Planning Managers and Planners
- ✓ Program Analysts
- ✓ Performance Improvement Office Staff
- ✓ CFO/budget office staff involved in meeting OMB/congressional results reporting requirements

DAY 1 Thursday, November 29, 2012

8:30 Continental Breakfast and Registration

9:00 MODULE 1: Overview and Logic Model Utilization

Review the Mandates that Affect Program Evaluation and Performance Measurement

- Understand the foundations and functions of program evaluation
- Examine the relationship between program evaluation and performance management
- Understand the function of GPRA and OMB initiatives as they pertain to programs and performance measurement
- Evaluate recent performance measurement and program evaluation under the current President's initiatives

Defining the Researchable Question

- Align research expectations and goals between managers and evaluators
- Understand the criteria behind a researchable question
- Attain the knowledge of the higher level questions that evaluators are trying to answer

Interactive Exercise: Developing the Logic Model for Program Evaluation

As a conceptual framework of a program's expected lifecycle, the logic model represents one of the best tools in managing and measuring program performance by mapping the critical junctures in the program as it progresses to its ultimate end outcomes. By this standard, the logic model also becomes a critical tool for program managers in both preparing and understanding program evaluation by recognizing what key program aspects will be evaluated. During this hands-on session, course attendees will:

- Learn about the logic model framework and its benefits
- Explore examples of federal program logic models and create a conceptual model of your program

12:00 Lunch Break

1:00 MODULE 2: Evaluation Design and Data Collection

Interactive Session: Understanding and Utilizing an Evaluation Design Matrix

One of the most critical aspects during program evaluation is conceptualizing and designing the evaluation itself. Oftentimes, a deficient evaluation design may result in the mis-alignment of expectations between program managers and evaluators and increase the possibility of inadequate findings. Course attendees will be given specific tools that include a workable design matrix to help them better understand this process. This interactive session will focus on:

- Understanding and utilizing a design matrix as it pertains to program managers preparing for evaluations
- Discussing and selecting the appropriate methods of evaluation as they fit into selected programs
- Communicating and aligning evaluation expectations between program managers and evaluators

Data Gathering and Validation

- Understand the evaluator's role and methods of data gathering and validation
- Assess your role during the data gathering phase
- Facilitate open communication with program evaluators with necessary data collected from program operations

4:00 Day One Adjourns

DAY 2 Friday, November 30, 2012

8:30 Continental Breakfast and Registration

9:00 MODULE 3: Analysis, Reporting and Communication

Evaluation Analysis

- Review data analysis methods that may be used by the evaluating bodies
- Assess qualitative and quantitative methods of analysis
- Understand your role in the analysis process
- Analyze and provide input for the final report

Evaluation Reporting

- Identify the stakeholders and audience to present evaluation findings
- Engage in active discussions with the evaluation team on their findings
- Pinpoint program deficiencies and areas of improvement as identified by the evaluation team with the conceptualized logic model
- Formulate effective strategies to address evaluation findings
- Utilize tools that will help prioritize improvement methods to address program findings

12:00 Lunch Break

1:00 MODULE 4: Strategies and Wrap-Up

Post-Evaluation Processes and Practices

- Understand the GAO perspective and goals behind evaluations
- Review ways to utilize evaluation findings to improve programs

Overcoming Barriers to Improvement

- Anticipate and prepare for challenges in implementing evaluation findings
- Create the need for an evaluation function within your program or agency to augment your performance management goals

Course Wrap-up

4:00 Training Adjourns

Become a Certified Government Performance Manager



To address your professional needs and ensure your organization's success, the Performance Institute offers a **Certificate in Government Performance Management.** Certificate completion requires only 3 required and 3 elective courses that you can select based on topics that meet your agency's unique needs. Upon successful completion, you will emerge from the Institute's certification program with a thorough understanding of all course concepts — and poised to apply what you learned in a real and practical way. As a Government Performance Manager Certificate candidate you can:

- **CUSTOMIZE** Any Program to Fit Your Needs
- **ADVANCE** Your Career with New Skills and Competencies
- **MEET** New Certification Requirements as Required by OMB and Congress

FOR MORE INFORMATION ABOUT CERTIFICATION, please contact:

Anthony Masucci at 202.739.9548 or email him at Anthony.Masucci@PerformanceInstitute.org.

Meet the Trainer



TED KNIKER,

Executive Director, Performance Institute

With nearly 25 years of experience in government, Ted is a recognized expert in developing internal evaluation and monitoring capabilities and creating performance metrics and program evaluation strategies for hard to measure programs. He is a frequent and popular presenter on GPRA, PART, performance measurement and evaluation. Several senior executives have noted Ted's ability to explain planning and results measurement processes and methods in an easy-to-understand, non-threatening way. Ted was recognized by President Bush for his contributions in budget and performance integration.

From 2006 to 2011, Ted was an executive consultant with the Federal Consulting Group (FCG), a fee-for-service franchise operation of the U.S. Department of the Interior that works with all government agencies to improve their performance. Ted worked with over 30 agencies to develop strategic plans, improve business processes, develop and deploy performance management frameworks, and evaluate impact. His systems approach, with a strong emphasis on leadership effectiveness and workforce engagement, led FCG to attain its highest consulting revenues in its 22 year existence.

Prior to joining FCG, Ted was the Chief of Evaluation and Performance Measurement for the Department of State's Bureau of Educational and Cultural Affairs from 1998 to 2006. Under his leadership, the evaluation office was recognized as a best practice and achieved the highest international affairs scores on the OMB Program Assessment Rating Tool (PART). Ted also conceptualized and developed an integrative online performance measurement system that OMB recommended be used for all government exchange programs. In 2004, he was asked to serve as the Department's first Director of Evaluation and Measurement for Public Diplomacy, directly serving the Under Secretary for Public Diplomacy and Public Affairs. From 2002 through 2006, he formed the foundational approaches to evaluation that are being pursued today. Prior to this, Ted has also served as the Senior Program Manager for European Academic Exchanges whose programs served as models for the State Department's development for exchanges for the Middle East. Ted began his distinguished public service career through the former United States Information Agency as a Presidential Management fellow.

Ted received his Master's degree in International Relations from George Washington University and his B.A. in political science from Grinnell College. He has also served on the Board of Examiners for the Malcolm Baldrige National Quality Award and is also certified as a Green Belt in Six Sigma.

Post-Workshop Coaching Sessions enhance your learning experience and bring results directly to your agency by signing up for a customized evaluation coaching session with our trainer. For this post-workshop activity, our trainer will provide (on-site or virtually) 4 hours of evaluation coaching and consulting that can be applied to your specific needs. Assistance areas might include: adapting the course material for your agency, creating an evaluation action plan for your program portfolio, developing an evaluation communication plan for your Quarterly Performance Review meetings, providing feedback on an evaluation project design, reviewing a survey or evaluation report, outlining an evaluation project RFP, getting top level support for evaluation funding,, and other strategies for evaluation success within your agency.

Price: $250 per each 4-hour session

In-House Training & Customization



IN-HOUSE TRAINING & CUSTOMIZATION

One of the more popular vehicles for accessing the Institute's educational offerings is the delivery of on-site trainings and management facilitations. Bringing a training or facilitation in-house gives you the opportunity to customize a program that addresses your exact challenges and provides a more personal learning experience, while virtually eliminating travel expenses. While many training providers will offer you some variation of their standard training, The Performance Institute's subject matter experts will work with you and your team to examine your programs and determine your exact areas of need.

AREAS OF EXPERTISE

On-site delivery of single courses, certification programs, and entire packages of specialized courses are available in the following areas:

- Strategic Planning
- Lean Six Sigma
- Performance-Based Contracting
- Administrative Management
- Performance Measurement
- Workforce Management
- Performance Reporting
- Leadership and Change
- Project Management
- Performance-Based Budgeting
- Program Evaluation

FOR MORE INFORMATION ABOUT IN-HOUSE TRAINING & CERTIFICATION OPTIONS,
please contact: Chris Kamal at 202-739-9619 or email him at Chris.Kamal@PerformanceInstitute.org.

SPONSORSHIP OPPORTUNITIES

As a conference and training provider, PI is an expert in bringing together leaders to share and discuss best practices and innovations. We connect decision-makers with respected solutions providers. The Institute offers four different pre-designed sponsorship packages:

- Event Co-Sponsor
- Luncheon Sponsor
- Session Sponsor
- Exhibit Booth Sponsor

FOR MORE INFORMATION ABOUT EXHIBITING & SPONSORSHIP OPPORTUNITIES, please contact: Andrew Goodwin at 202-739-9707 or email him at Andrew.Goodwin@PerformanceInstitute.org.

VENUE

Workflow Mapping and Analysis will be held at The Performance Learning Center in Washington DC. The Learning Center is just a few blocks from the Gallery Place Chinatown metro which services the red, yellow and green lines. If you plan on driving, a public parking garage is located inside of the building. You can access the parking garage on K Street and the parking is $18.00 a day.

The Performance Institute Learning Center
901 New York Ave, NW, Washington, DC 20001
3rd Floor West Tower
202-524-8041

PLEASE NOTE: The building elevators do not allow delegates up into the Learning Center until 8:30am.

HOTEL

The Performance Institute has secured a group rate discount at a surrounding hotel provider. Please contact customer service for the most up to date rate at **877-992-9521**.

TO REGISTER ONLINE: Click on the Venue and Hotel tab at www.PerformanceInstitute.org/evaluation.

TUITION & GROUP DISCOUNTS

Tuition rates for **Program Evaluation for Managers**:

Event Date:	$899 until…	$999 until…	$1099 until…
Nov. 29-30	August 30	September 28	Closing

For more information on pricing and group discounts, contact:

Anthony Masucci at 202.739.9548 or Anthony.Masucci@PerformanceInstitute.org

EARN UP TO 12 CPE CREDITS!

Sponsor Organization Name and Sponsor ID Number:
Thompson Media Group 109435
Delivery Method: Group-live
Program Level: Basic
CPE Credits: 12
Prerequisites: None
Preparation: None

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CANCELLATIONS & QUALITY ASSURANCE

The Performance Institute (PI) strives to provide you with the most productive and effective educational experience possible. If after completing the course you feel there is some way we can improve, please write your comments on the evaluation form provided upon your arrival. Should you feel dissatisfied with your learning experience and wish to request a credit or refund, please submit it in writing no later than 10 business days after the end of the training to:

The Performance Institute: Quality Assurance
805 15th Street, NW, 3rd Floor, Washington, DC 20005

Note: As speakers are confirmed six months before the event, some speaker changes or topic changes may occur in the program. The Institute is not responsible for speaker changes, but will work to ensure a comparable speaker is located to participate in the program. If for any reason PI decides to cancel this conference, PI accepts no responsibility for covering airfare, hotel or other costs incurred by registrants, including delegates, sponsors and guests.

- All 'Early Bird' Discounts must require payment at time of registration and before the cut-off date in order to receive any discount.
- Any discounts offered by The Institute (including team discounts) must also require payment at the time of registration.
- All discount offers cannot be combined with any other offer.
- Discounts cannot be applied retroactively.
- Payment must be secured prior to the conference. If payment is not received by the conference start date, a method of payment must be presented at the time of registration in order to guarantee your participation at the event.

Registration Form



CALL:
877-992-9521



FAX FORM TO:
866-234-0680



VISIT US ONLINE:
PerformanceInstitute.org/evaluation

REGISTRATION FORM

☐ Yes! Register me for **Program Evaluation for Managers**

Choose a program date: ☐ May 14 ☐ September 20

☐ Please call me. I am interested in a special group discount for my team

Delegate Information

Name _____ Title _____

Organization _____ Dept. _____

Address _____

City _____ State _____ Zip _____

Telephone _____ Fax _____

Email _____

Payment Information

☐ Check ☐ Purchase Order/Training Form ☐ Credit Card

Credit Card Number _____ Expiration Date _____ Verification no. _____

Name on Card _____

Billing Address _____ City _____ State _____ Zip _____

Please make checks payable to: The Performance Institute

CANCELLATION POLICY: The Performance Institute will provide a full refund less a $399 administration fee for cancellations requested four weeks prior to the event start date unless cancellation occurs within two weeks prior to the event start date. If a cancellation is requested less than two weeks prior to the event start date, no refund will be issued. Registrants who fail to attend and do not cancel prior to the event will be charged the entire registration fee. All cancellations must be requested through the cancellation link found in your attendance confirmation email. Please note that cancellation is not final until you receive a cancellation confirmation email.

☐ I have read and accepted the Cancellation Policy above.

ACKNOWLEDGED AND AGREED

By: _____ Date: _____

Priority Code: P975-WEB