

The History of the
Office of Executive and Management Development
During the
Clinton-Gore Administration
1992-2000

Major Accomplishments

During the Clinton-Gore Administration a number of major developments were accomplished within the Office of Executive and Management Development (OEMD). These accomplishments are:

1. A major reorganization which created the Office of Executive and Management Development.
2. The procurement and/or upgrading of building facilities for all components of the Office of Executive and Management Development.
3. The creation of the Center for Executive Leadership.
4. Further development of the OEMD curriculum to meet client needs.
5. Support of Administrative and Congressional initiatives.
6. The development of partnerships with two major universities that use OEMD programs as credit towards the course requirements for Master of Public Administration degrees.

Each of these accomplishments will be discussed in a separate section of this document. Pertinent attachments that apply are appended.

Reorganization and Creation of the Office of Executive and Management Development (OEMD)

Prior to the Clinton-Gore Administration the components which now make up the Office of Executive and Management Development (OEMD) were part of a much larger organization, the Human Resources Development Group (HRDG) (Attachment 1). HRDG was a very large organization that had responsibility for worldwide training and development policy and program delivery. It provided resources to the Senior Executive Services through its Office of Executive Resources; delivered interagency executive and management residential programs through the Federal Executive Institute and the Management Development Centers; gave specialized programs to government agencies in Europe through its European Training Program; developed correspondence courses through its National Independent Study Center; presented programs on the workings of Congress through its Government Affairs Institute; and developed and maintained a registry of approved training and development resources that agencies could use through the Training Assistance Programs and Services division. HRDG also provided guidance to a network of OPM regional training operations that provided nationwide services to Federal agencies.

When the Clinton-Gore administration sought to reinvent and reorganize the Federal Government into a leaner, more effective delivery system, OPM Director James King privatized much of OPM's training delivery system. HRDG and the regional training delivery systems were abolished and the Office of Executive Resources (OER) was created on February 19, 1995, made up of the Office of Executive Policy and Resources (which provided service to the Senior Executive Service); The Federal Executive Institute and the Management Development Centers (Attachments 2, 3, 4). With this decision Director King retained only those components of training and development which directly contributed to the development of the executive management cadre of the Federal Government. All other training and development components were privatized.

On September 9, 1998 OPM Director Janice Lachance removed the Senior Executive Service policy and evaluation function from the Office of Executive Resources and created two functions: The Office of Executive Resources Management (for the Senior Executive Service management function); and the Office of Executive and Management Development (OEMD) for the residential delivery programs intended to improve executive and management performance in government (Attachments 4,5,6).

At this point, the Office of Executive and Management Development consists of the Federal Executive Institute and the Management Development Centers.

Historical Background

The Federal Executive Institute and the Management Development Centers were established in direct response to Federal agencies' expressed needs to have interagency learning centers available so that Federal managers and executives could be developed within a corporate Federal culture. Federal agencies believed that their managers and

executives needed to understand how Federal policy was formulated and practiced. As these centers grew and developed, agencies further requested that detailed developmental opportunities in management practices be added to the curriculum.

The establishment of the Federal Executive Institute and the Management Development Centers was facilitated by the Government Employees Training Act of 1958, Executive Order 11348 of 1967, and Executive Order 12107 of 1978 (Attachment 8). These references codified the ground rules for training and development in the Federal sector.

The Federal Executive Institute (FEI) was established in 1968 on 15 acres of property in Charlottesville, Virginia. It is a residential training site for members of the Senior Executive Service and high potential GS-15's in the Federal service. The programs of the FEI are described in the attached document, The Leadership Journey. The Federal Executive Institute was examined in detail by the Director, OPM during the Gore Commission's government reinvention and reorganization effort in 1995 and determined to be critical to the mission of OPM and to the needs of the entire Federal community. (Attachment 9).

The Management Development Centers trace their origins to 1963 when the first facility, originally called the Executive Seminar Center, was established on the site of the Merchant Marine Academy at Kings Point, New York. These centers were originally established to provide residential seminars in public policy formulation and practice to managers and executives of the Federal community. As demand for these programs grew the U.S. Civil Service Commission (predecessor agency to the U.S. Office of Personnel Management) added centers around the country. Centers were set up in Berkeley, California; Oak Ridge, Tennessee; Wilmington, Delaware; Denver, Colorado; Lancaster, Pennsylvania; Aurora, Colorado and finally, Shepherdstown, West Virginia. The largest number of centers at one time was four in the late 1970's. Consolidation into larger centers was begun in the 1980's and completed in 1998 when the second of two new large facilities were completed in Shepherdstown, West Virginia. Programs of the Management Development Centers are described in the attached document, The Leadership Challenge.

Upgraded Facilities for the Functions of the Office of Executive and Management Development

All functions of the Office of Executive and Management Development saw facilities improvement during the Clinton-Gore administration.

The Federal Executive Institute completed a rehabilitation of its main building and public area with a program that expanded its library into a public reception area and upgraded its public area furnishings. Most importantly the FEI completed and opened its Pamela Blair Gwin annex, a separate building which greatly expands FEI's ability to provide specialized and tailored courses through its new Center for Executive Leadership. These programs can take place during the times the residential 4-week Leadership for a Democratic Society Program is in session. This building contains additional residence space (16 rooms), two large meeting rooms, reception services, and a library.

The Western Management Development Center moved from downtown Denver to Aurora, Colorado in the early 1990's. This center offered greatly expanded opportunities for agencies to send more participants to its programs. During the Clinton-Gore administration this facility was further expanded to take up two entire floors of a large office building. This expansion gave the WMDC five large classrooms, 24 breakout rooms (many with video observation capability), a large library, computer lab, reception and break area, and administrative offices. This facility is now equipped to offer programs to nearly 4,000 participants each year.

A determination was made in the mid-1990's to consolidate all Management Development Center functions east of the Mississippi River into a single centralized facility. A search was made and a "build-to-suit" facility was chosen in Shepherdstown, West Virginia. That facility, the Eastern Management Development Center, was opened in 1998 consolidating the services then provided in Lancaster, Pennsylvania and Oak Ridge, Tennessee (which was closed earlier and temporarily consolidated to Lancaster). This facility provided the same operational advantages as the Western MDC, offering multiple use classrooms, breakout rooms, reception areas, library and computer lab services, and generous administrative offices (Attachment 10).

The Office of Executive and Management Development now has the capacity to offer programs for 8,000-10,000 Federal executives and managers each year in state-of-the-art residential facilities. Each facility has comprehensive learning centers with computer support, satellite feed capability, and physical fitness centers. These facilities and their residential amenities offer world class learning opportunities to their client agencies.

Creation of the Center for Executive Leadership

For years, participants of the Federal Executive Institute's *Leadership for a Democratic Society* program asked for the opportunity to bring their own employees to the Institute for tailored programs which would meet their specific agency needs. This need was met by the establishment of the Center for Executive Leadership (CEL) in 1996. This program, pioneered and developed by Linda C. Winner, Ph.D., provides specially designed programs and consultative services to client agencies. It has grown from a start-up operation to one that brings in over \$4.5 million in revenue annually to OEMD. More importantly, this organization responds to and provides solutions to some very specific Federal agency needs (Attachment 11).

The success of the CEL has spawned similar efforts at the Management Development Centers to respond to agency specific developmental needs for their client groups. The MDC's are often asked to develop and manage employee and organizational assessment programs as well as providing specific on-site training sessions for agency supervisory and management groups.

The Eastern Management Development Center has a special conference center program which provides agencies the opportunity to rent the facilities of the EMDC for their own use. Those conferences are usually developed and managed by agencies and operate in the space offered by the EMDC, but conference development and management are also offered by the EMDC (Attachment 12).

Curriculum Development in the Office of Executive and Management Development

Several areas of new curriculum development were advanced during the Clinton-Gore administration. Prior to Clinton-Gore there was not a coordinated curriculum development process between the Federal Executive Institute and the Management Development Centers because they were not in the same organizational chain. During Clinton-Gore these centers were placed into the same organization, then put under unified management and the curriculum began to develop and advance around the unified theme of improving agency performance through the development of agency executive management. Today the Office of Executive and Management Development provides a wide variety of developmental opportunities it calls *The Leadership Journey* (Attachment 13).

The Leadership Journey is a construct of developmental opportunities presented in five thematic areas:

1. The National Policy Curriculum which is comprised of 13 seminars which explore relevant and topical political, social, economic, and cultural issues that affect government decision-makers today.
2. The Core Curriculum which is composed of six residential management and leadership courses that develop the competencies high-performing leaders need to produce results in 21st century government.
3. The Assessment curriculum which includes four programs that help leaders seek feedback, understand that feedback, and implement appropriate individual development plans to build on strengths and develop areas of weakness.
4. Focused Skills Development, a battery of 25 programs that prepare individuals, teams, and organizations to meet the challenges of the new workplace. This cadre of courses provides the building blocks for the organization of the future.
5. Custom Seminars and Consulting Services are products tailored to the specific needs of individual agencies and organizations. These programs are offered in residence at one of our Centers, or on-site in the agency, as appropriate.

Programs Offered in Support of Administrative or Congressional Initiatives

The strength of the Office of Executive and Management Development is that it can quickly respond to administrative and/or congressional priorities and present those issues in its programs. This meets the needs of all stakeholders in the public process by expeditiously arranging for a full airing of issues to include members of the administration, congressional representatives, agency officials, and interest groups in the programs of the OEMD.

During the Clinton-Gore administration special programs or seminars were developed in three important areas:

1. The Government Performance and Results Act (GPRA) legislation that required Federal agencies to develop their agency budgets around sound strategic management principles. OEMD developed a specific 2-week seminar on this topic that trained several hundred Federal personnel in the operations of this legislative requirement.
2. The National Performance Review and Reinvention of Government effort developed by Vice President Al Gore. This effort gave the OEMD an opportunity to highlight successes in these areas by bringing officials from Federal agencies that had made significant improvement or brought major efficiencies to the operations of their mission to the programs of the OEMD. Dozens of these successes were highlighted and shared with the larger Federal community through the programs of OEMD.
2. Diversity. OEMD developed and presented a special program in diversity for the Federal community. This program focuses on the business advantage that accrues to an organization that seeks a strong and diverse representation in its workforce.

Partnerships with Universities

The programs of the Management Development Centers are rigorous and intensive and have high academic value. Every 5 years MDC programs are evaluated by the American Council on Education (ACE) for their merit and the majority are listed for academic credit. This process facilitates universities granting credit to programs taken outside their own curricula. Accordingly, most programs at the MDC's are recommended for undergraduate or graduate level credit (depending on the program) for between 2-5 hours of academic credit.

During the Clinton-Gore administration the Office of Executive and Management Development built on this ACE credit grant to develop partnerships with two major universities; The University of Colorado, Denver, and American University in Washington, D.C. These partnerships allow credit for programs taken at the Management Development Centers to be granted toward the requirements for a Master of Public Administration degree at either of these universities (Attachment 14).

This partnership has enormous advantages for agencies and their managers and executives. Those who participate in MDC programs gain competence in their own jobs and, if they wish, can apply those programs toward the credit requirements of a Master of Public Administration degree at either of those universities. This is a significant efficiency and cost savings to agencies and their employees. The University of Colorado, Denver will grant up to 18 hours credit taken at MDC programs; American University will grant up to 12 hours credit.

We are not limited to developing partnerships with only these two universities. OEMD is open to developing similar relationships with other academic institutions, perhaps in other areas of academic pursuit.

The Future of the Office of Executive and Management Development

OEMD is poised to provide world class developmental opportunities to the Federal executive management cadre of the future. We have unbeatable facilities, a broad client focused curriculum, top-notch faculty and staff, business-centered leadership, and strong support from our client base. Our organizational values were developed from the bottom up and seek to improve government effectiveness by strengthening the leadership and personal competencies of Federal managers and executives (Attachment 15). OEMD has developed new program offerings, strengthened its financial management programs, built a technology infrastructure to support e-learning applications, and sought partnerships with important stakeholder groups. These efforts are outlined in the series of work plans and performance plans appended to this document as Attachment 16.

Attachment I

Organization Chart
Human Resources Development Group
1994

HUMAN RESOURCES DEVELOPMENT GROUP

TITLE

NAME

Director

Secretary

Deputy Director

Program Analysis Officer

Federal Executive Institute

Assistant Director for Executive Resources

SES Operations Division

SES Services Division

Assistant Director for Training Operations

Career Development Programs

Central Management Development Center

Eastern Management Development Center

Western Management Development Center

National Independent Study Center

European Training Center

Government Affairs Institute

Training Assistance Programs and Services

Assistant Director for Planning and Development

Development Division

Planning Division

Assistant Director for Marketing and Information

Marketing and Interagency Coordination Division

Administrative Systems Division

Carol J. Okin

Patricia R. Carrick

Judith M. Jaffe

Deborah D. Smith

Curtis J. Smith

K. Joycé Edwards

Susan G. Roehmer

H. Joe Shepherd

Dee W. Henderson

Lewis Taylor

Thomas C. Dausch

Thomas C. Dausch

Sharon S. Senecal

Patricia C. Schwingle

Norman V. Pocase

Kenneth A. Gold

Harold Segal

Sarah D. Adams

Ellen M. Roderick

C. D. Pangallo

Don G. Mizaur

Richard J. Indelicato

Jonathan T. McMullen

Attachment 2

Memorandum announcing the creation of the
Office of Executive Resources
Effective February 19, 1995

February 17, 1995

MEMORANDUM

TO: Faculty, Adjunct Faculty, and Staff
FROM: Curt
SUBJECT: OPM Reorganization

We have received the "Restructuring Memorandum of Understanding" on the OPM reorganization. Effective Sunday, February 19th, we become the Office of Executive Resources, which includes FEI, the Western and Eastern Management Development Centers (Sharon Senecal and Tom Dausch), and the Office for Executive Policy and Operations (formerly the Office of Executive Resources under HRDG, headed by Joyce Edwards) and we will report directly to Jim King.

If anyone has any questions please let me know. Also, if anyone is interested in receiving a copy of the restructuring memorandum, please let Carolyn know.

Attachment 3

Mission statement for the Office of Executive Resources

February 1995

OFFICE OF EXECUTIVE RESOURCES

The Office of Personnel Management's (OPM) Office of Executive Resources (OER) contributes to improved Governmental performance through the selection, management, and development of Federal executives who can lead, who understand their constitutional role, and who possess a broad, corporate view.

The Office operates the Senior Executive Service (SES) personnel system, providing Government-wide program leadership, policy direction, and technical assistance on all aspects of the SES.

OER manages the President's Quality Awards program to recognize Federal organizations that have demonstrated exemplary quality improvements (this is the Federal equivalent of the Malcolm Baldrige Award). The Office also conducts the annual, national conference on quality held each summer, where Federal managers and employees share information, tools, and techniques for improving the quality of Government programs, and where the Quality Award is presented.

OER operates the Federal Executive Institute (FEI) and the two Management Development Centers (MDC) (in Denver, Colorado and Lancaster, Pennsylvania), where Federal executives and managers receive education in leadership, our system of governance, and a broader, more corporate view of their roles and responsibilities.

OFFICE OF EXECUTIVE POLICY AND SERVICES (OEPS)

Office of the Assistant Director

- Exercises leadership to promote effective and efficient use of the Government's executive resources. This includes working with agencies to create and reinforce a corporate perspective within the Senior Executive Service (SES).
- Collaborates on the development of legislative initiatives related to the Government's executive personnel systems.
- Directs the development and maintenance of Governmentwide regulations dealing with SES, senior-level (SL), and scientific and professional (ST) personnel systems.
- Oversees maintenance of an automated executive information system which supports the Government's executive personnel programs.

- Fosters systems to provide consultative services and technical support to agencies on executive personnel activities.

SES Policy and Operations Division

- Develops and interprets regulations and develops supplementary guidance on the entire range of executive personnel activities including position management and authorization, merit staffing, noncompetitive placements (reassignments, noncareer appointments, limited appointments, reinstatements), pay administration, leave and benefits, performance appraisal and recertification, awards, disciplinary actions and grievances, RIF, and removals.
- Collaborates on the development of Governmentwide executive development policy and develops supplementary guidance on SES Candidate Development Programs, executive succession planning, and other activities which promote development and maintenance of a strong, effective SES corps.
- Coordinates the allocation of SES, SL, and ST spaces through the biennial review process or on an *ad hoc* basis.
- Reviews agency nominations for SES career appointments and administers the Qualifications Review Boards established to certify candidates' executive qualifications.
- Processes requests for noncareer appointment authorities.
- Reviews and recommends action on limited term/emergency appointment authorities.
- Responds to agency and individual requests for executive placement assistance related to actions involving PAS returnees, reinstatement, and RIF placement.
- Encourages voluntary mobility of SES members within and between agencies through advice and assistance to executives and agencies.
- Administers the SES sabbatical program which enables executives to take temporary assignments in the private sector, State and local governments, non-profit organizations, and colleges and universities.
- Reviews and recommends action on requests for dual compensation waivers and critical pay authorities.

- Reviews and recommends action on agency SES performance appraisal plans, SES recertification plans, and SES Candidate Development Programs.

SES Services Division

- Administers the Presidential Rank Awards Program. Conducts the process for reviewing and rating agency recommendations for the ranks of Meritorious and Distinguished Executive and prepares recommendations for the OPM Director to make to the President.
- Prepares and issues publications related to the SES including *SES Vacancy Announcements*, *OPM Message to the SES*, *SES Brochure*, *Guide to Senior Executive Service Qualifications*, *ERB Chairperson Directory*, *Sabbatical Pamphlet*, *SES Rank Award Winner Brochure*, and *Features of the SES*.
- Serves as the Office of Executive Resources liaison with the Interagency Advisory Group Committee on Executive Personnel and the Executive Resources Management Group.
- Maintains a "speakers bureau" which promotes outreach and communication on executive personnel issues through public speaking engagements.
- Coordinates orientation programs for new Senior Executives and Schedule C employees.
- Maintains an automated database containing a wide variety of detailed information on executive positions, executives, and CDP participants.
- Develops data based reports, studies, and analyses on various executive personnel related matters in support of programs administered by OER and other OPM offices.
- Prepares statutorily required reports on the SES.
- Provides data to Federal agencies, oversight bodies, researchers, and others for various purposes.
- Supports internal OER information management and financial management initiatives.

THE FEDERAL EXECUTIVE INSTITUTE (FEI)

- Offers year-round, interagency, executive development programs for Government managers (GS15 and SES) in a residential setting.
- Designs, develops, and delivers 4-week *Leadership for a Democratic Society* program and short programs on select topics of unique interest to public service executives.
- Assists agencies in the development of their career executive corps, linking individual development to improved agency performance.
- Develops a more complete understanding of and appreciation for the constitutional basis of American governance through seminars and workshops.
- Offers courses on the foundations of public service culture and the values inherent to it.
- Develops in participants an increased awareness of the dynamics surrounding contemporary policy issues and problems through presentations and meetings with senior Government officials.
- Develops supportive networks of expertise and advice through the cross-functional and cross-agency mix of program participants.
- Identifies optimal individual performance goals, objectives, and developmental needs through diagnosis and performance assessments.
- Enhances work team effectiveness, group performance, and group leadership capabilities.
- Establishes and maintains financial control systems necessary to ensure a sound reimbursable business operation.

EASTERN AND WESTERN MANAGEMENT DEVELOPMENT CENTERS (EMDC/WMDC)

- Design, develop, and conduct seminars on leadership and management and on select public policy issues for Government executives and managers.
- Design and conduct management assessment programs.
- Operate large-scale residential facilities providing, under contract, food, lodging, and student support services needed to ensure a quality learning experience.

- Maintain a continuing program of outreach to key officials in agencies, public interest organizations, and others to identify current and future needs for executive and management development.
- Evaluate management and policy programs to identify issues and continuously update and improve the content and delivery of seminars offered.
- Establish and maintain financial control systems necessary to ensure a sound reimbursable business operation.
- Manage the President's Quality Award program and the annual conference on Federal quality (EMDC only).

Attachment 4

Organization Chart for the
Office of Executive Resources

February 19, 1995

OFFICE OF EXECUTIVE RESOURCES

TITLE

NAME

Director

Curtis J. Smith

Secretary

Carolyn T. Yowell

**Assistant Director for Executive Policy and
Services**

K. Joyce Edwards

SES Policy and Operations Division

Anne Kirby

SES Services Division

Carol A. Harvey**

**Director, Eastern Management Development
Center**

Thomas C. Dausch

**Director, Western Management Development
Center**

Dennis L. Center

Director, Federal Executive Institute

Curtis J. Smith

** Denotes Acting

Attachment 5

Memorandum to Reorganize the Office of Executive Resources
Into the Office of Executive and Management Development and
The Office of Executive Resources Management

September 9, 1998

September 9, 1998

MEMORANDUM FOR JANICE R. LACHANCE
DIRECTOR
OFFICE OF PERSONNEL MANAGEMENT

FROM: CURTIS J. SMITH, DIRECTOR
OFFICE OF EXECUTIVE RESOURCES

SUBJECT: Reorganization of the Office of Executive
Resources

This is to request your approval for a reorganization of the Office of Executive Resources to be effective beginning FY 99.

The Office of Executive Resources currently has a two-fold mission - one in the area of executive development and the other in the area of Senior Executive Service policy and evaluation. In addition to the functional differences, one of these functions is totally funded on a reimbursable basis while the other is S&E. Further, the position of Director, Office of Executive Resources, represents an organizational layer that could be eliminated without harming the functions of either part. After careful consideration, I have come to the conclusion that organizationally it would be reasonable to separate these two functions. Therefore, I am proposing the following actions:

- Abolish the position of Director, Office of Executive Resources.
- Establish a position of Director, Office of Executive and Management Development, which would be responsible for all executive and management development for OPM to include the Federal Executive Institute and the Management Development Centers. The incumbent would also carry the title Director of the Federal Executive Institute.

- Retitle the Assistant Director for Executive Policy and Services to be the Director, Office of Executive Resources Management, but otherwise make no change in the structure or functions of that organization.
- Modify delegations of authority to reflect that the Director, Office of Executive and Management Development and the Director, Office of Executive Resources Management receive their program and administrative authorities from the Office of the Director and report directly to that Office.

With your concurrence, we will work with Local 32 and develop a memorandum of understanding for their signature.

ACTION:

 Approve

 Disapprove

 Let's Discuss

Janice R. Lachance, Director

Date

Attachment 6

Organization Chart for the Office of Executive and Management Development

October, 1998

OFFICE OF EXECUTIVE AND MANAGEMENT DEVELOPMENT

TITLE	NAME
Director	Barbara J. Garvin-Kester
Secretary	Carolyn T. Yowell
Director, Eastern Management Development Center	Barbara K. Smith**
Director, Western Management Development Center	Joseph D. Wienand
Director, Federal Executive Institute	Barbara J. Garvin-Kester
Deputy Director	Robert Gest III

** Denotes Acting

Attachment 7

Structure and Key Responsibility statement for the
Office of Executive and Management Development

OFFICE OF EXECUTIVE AND MANAGEMENT DEVELOPMENT

Associate Director and Title:

Barbara Garvin-Kester
Director, Office of Executive and Management Development
Director, Federal Executive Institute

Overview:

The mission of the Office of Executive and Management Development (OEMD) is to provide executive and management development and training programs to enhance the effectiveness of our government leaders. We are the only organization in government that offers interagency, residential programs for executives and managers.

Structure:

The Office is the umbrella organization for three learning centers: the Federal Executive Institute (FEI) located in Charlottesville, Virginia, and two Management Development Centers (MDCs) located in Shepherdstown, WV, and Denver, Colorado. The staff of the Eastern Management Development Center in West Virginia includes three individuals located at OPM Headquarters who are dedicated to administering the President's Quality Award Program. The total headcount for OEMD is seventy-nine.

The Office of Executive and Management Development (OEMD) is funded through a Revolving Fund. No direct appropriations are provided. We operate very much like a small business. Our clients, Federal, state, local and international government agencies, pay tuition and fees for our programs and services. Demand for our services is strong.

Programs offered by The Federal Executive Institute (FEI) are designed to meet the needs of the Senior Executive Service (SES) and high-potential GS-15's. FEI's core program, "Leadership for a Democratic Society," is a four-week, residential program. Follow-up programs offered by FEI's Center for Executive Leadership (CEL) range from two days to two weeks and are targeted to graduates of FEI's core program. Our MDCs offer programs specifically for GS-13 through GS-15 managers. These programs are typically one to two weeks in length.

Key Responsibilities:

The Office of Executive and Management Development is committed to improving government performance by shaping the competencies and leadership effectiveness of the Federal executive and management corps. A revolving fund entity, this Office is specifically chartered to address the leadership effectiveness program element through training and development programs offered by its three facilities: The Federal Executive Institute (FEI), Eastern Management Development Center (EMDC), and Western Management Development Center (WMDC). Our residential and non-residential development programs are designed to instill common corporate values, develop management and executive skills, and improve understanding and stimulate Federal management awareness of public issues.

To meet our responsibilities, we recruit a small number of highly experienced, diverse faculty and administrative staff with expertise in human resources leadership and management (including business management skills.). We supplement this with a much larger group of contract, adjunct faculty who have subject matter expertise in a variety of curricula and support fields. The skills of the professional and technical staff are continuously upgraded. OEMD also has an Executive-In-Residence (EIR) Program whereby executives from various agencies are detailed to FEI and the MDCs on an 18-24 month assignment. We also have university interns who work for us on a temporary basis.

Prior to 1997, FEI and the MDC programs were primarily directed at improving the leadership abilities of individuals through residential, interagency programs. However, our focus groups, one-on-one meetings with agency leaders, and program evaluations showed us that our customers were asking us to change. To respond to our customers' changing needs, OEMD today also:

- Works closely with specific agencies to better understand their business issues and to provide them with leadership and management solutions to help them better serve their customers.
- Provides customized programs that are easily accessible, flexible, state-of-the-art, and focused on improving not only individual performance, but the organization's performance as well.
- Conducts evaluations to provide evidence of the impact of our programs.

Key Staff: (See attached organization charts and lists)

- Robert Gest III, Deputy Director – FEI
- Barbara Smith, Director – EMDC
- Joe Wienand, Director – WMDC
- Linda Winner – Director, Center for Executive Leadership at FEI
- Terry Newell – Program Director, FEI Leadership for a Democratic Society Program
- Lynn London – OEMD IT Manager
- Dennis Center – Director, OEMD New Business Generation
- John Lindermuth – OEMD CFO

Critical Deadlines/Significant Events:

Between December 2000 and August, 2001, the President's Quality Award Program completes its review process of applicant organizations, recommends Award Program winners to the OPM Director and the President, and conducts a high visibility award ceremony. Critical activities and dates are:

<u>Activity</u>	<u>Date</u>
1. Examiner teams conduct site visits at 9 Federal organizations	December 5, 2000
2. Award Program's Panel of Judges meet to review site visit findings and reports	March 9, 2001
3. Panel recommends Program winners to the OPM Director	March 15, 2001
4. If Presidential level winners are recommended, a decision package with recommendations is forwarded to the President for approval.	April 4, 2001
5. Review of recommendation package and Presidential decision	June 4, 2001
6. Presentation of awards at the Excellence in Government Conference	August 3, 2001

Key Issues/Challenges:

External

1. **Leadership development for more government managers, to ultimately improve performance at all levels of government.** We are uniquely situated as the only provider of multi-agency leadership training in the federal government. The residential environment allows leadership skill development that is closely linked to constitutional values and provides a forum that fosters idea sharing across agency boundaries for more innovative solutions to government-wide issues. Our programs are constantly rated outstanding, in part due to the multi-agency residential environment. Recent studies of the return on investment shows an over 4 to 1 monetary return for this type of leadership development when participants implement tools learned in our seminars. The current challenge is to reach as many federal managers as possible to enhance leadership skill development. We need opportunities to reach these managers, particularly at a time when a large number of our more experienced federal executives and managers are reaching retirement status.
2. **Transition Training:** The Federal Executive Institute has a keen interest in developing and overseeing orientation activities for Presidential Appointees. Our Center for Executive Leadership is well-known for its expertise in custom designing and delivering programs for executives on topics of leadership and public service. Upon request by the President-elect's transition team we will be happy to provide detailed proposals.

Internal

1. **Financial Performance:** For each organization within OEMD (i.e., FEI, EMDC and WMDC) financial performance is measured by annual retained earnings (i.e., revenue minus expense) in the context of a three-year financial plan. The financial plan meets the requirements to "break-even" and includes a three-year investment horizon to ensure that OEMD is careful and thorough about providing full value to its customers. In FY 2000, OEMD's annual retained earnings were \$190,000. Substantial increases in OPM common services were initiated after OEMD published prices for programs. Consequently, we anticipate negative retained earnings in FY2001.
2. **President's Quality Award Program:** OEMD currently manages the President's Quality Award Program without appropriated funds and necessarily at a very minimal level. The program has survived because OPM was willing to manage the essential award administration program elements with existing staff and financial resources. Due to reductions in both staff and budget, we are unable to manage the program beyond FY2001 without dedicated funding. In order for this program to continue, appropriated funds in the amount of \$600,000 are essential. These funds have been requested in a recent letter to OMB from OPM (dated October 20, 2000) which transmits OPM's FY 2002 current services budget and initial FY 2002 annual performance plan.

Backup Materials:

1. OEMD Vision\Mission\Values Statement
2. FEI LDS and CEL Brochures
3. OEMD Catalog
4. President's Quality Award Application Book

Attachment 8

Summary of the legal foundation for training in the federal government:

- a. Government Employees Training Act (1958)
 - b. Executive Order 11348 (1967)
 - c. Executive Order 12107 (1978)

Home | OPM | NASA | Handbook: Site Map

Introduction
Summary of the Legal Foundation of Training
Legal Foundation for Training
Legal References by Subject Area

Summary of the Legal Foundation of Training

<p>Summary of the Legal Foundation of Training (in order of importance from top to bottom)</p>
<p>Government Employees Training Act (GETA)</p> <p>The Government Employees Training Act, passed in 1958, created the framework for agencies to plan, develop, establish, implement, evaluate, and fund training and development programs designed to improve the quality and performance of the workforce.</p> <p>The Act was codified into chapter 41 of title 5, U.S. Code.</p> <p>The Act has been amended many times since 1958, including by the Federal Workforce Restructuring Act of 1994.</p>
<p>Chapter 41 of title 5, United States Code</p> <p>The U.S. Code is a codification (information that is ordered systematically) of those sections of legislative acts that prescribe action by Federal agencies.</p> <p>Laws (Acts) are codified shortly after their passage by Congress and published in the appropriate title to the U.S. Code.</p> <p>Title 5, U.S. Code is dedicated to human resource issues. It is organized into various chapter headings, with chapter 41 addressing "Training" in the Federal service.</p>
<p>Executive Orders (Exec. Order)</p> <p>Executive orders provide agency heads with additional presidential direction on how the law is to be used.</p> <p>Exec. Order No. 11348 (1967) provides agency heads and the U.S. Office of Personnel Management with additional information on how GETA is to be carried out. It was amended by Exec. Order No. 12107 (1978).</p> <p>The order emphasizes the importance of using effective interagency training programs to meet common needs across Government and requires that employees be selected equitably</p>

for training.

Part 410 and 412 of title 5, Code of Federal Regulations (5 C.F.R.)

The C.F.R. is a codification of the general and permanent rules published in the *Federal Register* by the executive departments and agencies of the Federal Government.

Part 410 of 5 C.F.R. represents the general and specific policies and requirements for training in Government agencies.

Part 412 of C.F.R. addresses developing executives, managers, and supervisors.

NOTE: Both part 410 and 412 of 5 C.F.R. were substantially amended in 1996.

[Home](#) | [OPM](#) | [NASA](#) | [Handbook Site Map](#)

Executive Order 11348

In 1967, President Johnson signed *Exec. Order No. 11348*, which was later amended by *Exec. Order No. 12107 (1978)*. This order provides agency heads and U.S. Office of Personnel Management with additional presidential direction on how training law is to be carried out.

The order delegates Presidential authority to approve employee training provided by a foreign government or international organization to agency heads, but it requires consultation with the Department of State prior to the first use of the training facility and periodically thereafter but not less often than every three years. It also directs agency heads to:

- plan, program, budget, operate, and evaluate training programs;
- foster employee self-development and recognize self-initiated performance improvements;
- provide training for employees without regard to race, creed, color, national origin, sex, or other factors unrelated to the need for training;
- establish and make full use of agency facilities for training employees;
- extend agency training programs to employees of other agencies and assign agency employees to interagency training whenever this will result in better training, improved service, or savings to the Government; and
- establish interagency training facilities in areas of substantive competence as arranged by the U.S. Office of Personnel Management.

The order delegates Presidential authority for training under *5 U.S.C. 41* to the U.S. Office of Personnel Management and directs that agency to provide the following assistance to Federal agencies:

- advice and counsel on improvement of training programs;
- assistance in developing sound training programs;
- identification of areas in which interagency training is needed;
- coordination of interagency training;
- development and maintenance of an information system to provide training data for use by the agency in its advisory role;
- dissemination of findings resulting from research in training technology; and
- exceptions for agencies or employees from various provisions

of the training law.

<input checked="" type="checkbox"/>

Home | OPM | NASA | Handbook Site Map

Introduction
Summary of the Legal Foundation of Training
Legal Foundation for Training
The Government Employees Training Act (GETA)
Title 5, U.S.C., Chapter 41
Other Laws That Affect Training
Executive Order 11348
Title 5, C.F.R. part 41
Federal Agencies Impacting the HRD Program
Legal References by Subject Area

The Government Employees Training Act (GETA)

The *Government Employees Training Act (GETA)* became law in 1958 giving Federal agencies general authority for employee training. Among its many provisions, this law authorized the use of non-Government training resources to meet identified training needs which otherwise could not be met with existing Governmental programs and facilities.

Before the enactment of GETA, some agencies carried out in-house training as part of their management function, other agencies had Congressional authorization to provide non-Government training, still others were seeking that authorization.

GETA establishes a flexible framework for the training and development of the Federal workforce. Specifically, it allows agencies to fund employee training to assist in achieving their mission and performance goals by improving employee and organizational performance. Amended in 1994, the Act permits agencies to take advantage of the existing training marketplace, Government or non-Government.

Provisions of GETA not Codified but Relevant to Program Administration

Paragraphs (1), (2), and (3) of section 2 of GETA are not codified (they serve as background information rather than mandate action) in title 5, of the United States Code (5 U.S.C.) but are extremely important to an understanding of the law's intent. They declare the policy of the United States Congress and capture the purpose and intent of human resource development today:

(1) "[I]t is necessary and desirable in the public interest that self-education, self-improvement, and self-training be supplemented and extended by Government-sponsored programs for the training of such employees in the performance of official duties and for the development of skills, knowledge, and abilities which will best qualify them for performance of official duties;

(2) [S]uch programs are to be continuous in nature, shall be subject to supervision and control by the President and review by the Congress, and shall be so established as to be readily expandible in time of national emergency; [and]

(3) [S]uch programs shall be designed to lead to:

- A. improved public service,
- B. dollar savings,
- C. the building and retention of a permanent cadre of skilled and efficient Government employees well abreast of scientific, professional, technical, and management developments both in and out of Government,
- D. lower turnover of personnel,
- E. reasonably uniform administration of training, consistent with the missions of the Government departments and agencies, and
- F. fair and equitable treatment of Government employees with respect to training."

Home | OPM | NASA | Handhool Site Map

Introduction
Summary of the Legal Foundation of Training
Legal Foundation for Training
The Government Employees Training Act (GETA)
Title 5, U.S.C., Chapter 41
Other Laws That Affect Training
Executive Order 11348
Title 5, C.F.R. part 41
Federal Agencies Impacting the HRD Program
Legal References by Subject Area

Title 5, United States Code, Chapter 41

Agencies Covered Under the Law Employees Covered Under the Law

Chapter 41 of title 5, United States Code (5 U.S.C. 41), codifies the provisions of GETA, and makes available to Federal agencies a management tool for increasing efficiency and effectiveness in Government. It places responsibility for human resource development specifically with the head of each agency. The agency head is responsible for ensuring that the training needs of the organization are identified and programs established to meet those needs.

In general, authority granted by the law is sufficiently broad and flexible to enable an agency to provide whatever training is necessary to meet mission requirements.

Under the law, agencies may conduct human resource development activities full or part-time, on- or off-duty, day or evening, or any necessary combination of these. Training can be provided by:

- the agency itself;
- another Government agency;
- a school;
- a manufacturer;
- a professional association;
- other competent persons or groups in or out of Government; and/or
- developmental work assignments such as details, rotations, mentoring, etc.

It can be carried out by correspondence, classroom work, conferences, workshops, supervised practice, or combinations of such methods. Agencies can pay all or part of the expenses of authorized training. Payment can be made directly to the facility (in advance, if need be), or the employee can be reimbursed if attendance was authorized in advance.

Agencies Covered Under the Law

Chapter 41 of title 5, United States Code applies to the following agencies:

- an Executive department;

- an independent establishment;
- a Government corporation subject to *chapter 91 of title 31, U.S.C.*;
- the Library of Congress; and
- the Government Printing Office.

See 5 U.S.C. §4101(1)(1997). *

Chapter 41 of title 5, United States Code does not apply to:

- a corporation supervised by the Farm Credit Administration if private interests elect or appoint a member of the board of directors;
- the Tennessee Valley Authority; (*5 U.S.C. §4102 (1997)*); and
- the U.S. Postal Service and the Postal Rate Commission, *U.S. Postal Reorganization Act, Public Law (Pub. L.) No. 91-375 (1970)*.

Employees Covered Under the Law

Employees covered under the law include:

- an individual employed in or under an agency covered by the law; and
- a commissioned officer of the National Oceanic and Atmospheric Administration.

Based on U.S. Office of Personnel Management interpretation, part-time and temporary employees are covered by this law.

This chapter does not apply to:

- an individual (except a commissioned officer of National Oceanic and Atmospheric Administration) who is a member of the uniformed services during a period which he is entitled to pay under section 204 of title 37;
- a member of the U.S. Foreign Service; and
- an individual appointed by the President, unless the individual is specifically designated by the President for training.

See 5 U.S.C. §4102 (1997). *

*This link is to the 1996 version of the document. To search for more recent updates select "Update" after following the link.

Attachment 9

Documents in support of the Federal Executive Institute
For the Gore Commission

GORE COMMISSION

- Duplication across government agencies (why not consolidate?)

Why does FEI exist?

What do we do that is different from other training and development organizations?

Why in Charlottesville and not a central location?

How do you know you are making a contribution? (Historical reviews/surveys and current initiatives)

How does your cost compare with others?

What does FEI do differently than universities, etc.?

What are new initiatives? Future goals?

What "value-added" for Clinton, et al.?

What is the Institution's responsibility in encouraging change and risk-taking?

If consolidation/change is the order of the day,

- what changes would help us do our job better?

How does FEI promote/model large-scale organizational change?

- Cross-agency
- Global/international perspective
- State/local government

Diversity/glass ceiling "lab"?

FEI could serve "consolidation" function.

Opportunity for executives to diagnose learning needs (self-assessment)

Note: Financial background/emphasis?

GORE

- Ia. The Federal Executive Institute since its inception in 1968 has been an integral part of first, the U.S. Civil Service Commission, and, subsequently, the U.S. Office of Personnel Management. Regardless of its location on the organization chart, the FEI has consistently and diligently maintained liaison with its organizational colleagues regarding such important matters as curriculum changes and development, changes in the executive workforce, new personnel management initiatives of special significance to federal managers, and changing requirements of customer agencies.

Given the sharp and primary focus of The Federal Executive Institute on long-term residential interagency training for incumbent senior executives, the unique visibility, status, prestige, and exclusivity of the FEI are all conducive to attracting high-level executives to its programs.

GORE

- Ib. The Federal Executive Institute has, for the 25 years of its existence, served and has been recognized as the "capstone" institution for senior executive development within the federal government.

The capacity of the FEI is appropriate to the demand for long-term residential interagency training at this level, and the rather sharp restrictions on eligibility requirements insures its credibility in the eyes of both the participating executives and their sending agencies.

The universe of executive development covers a host of differing requirements, and the FEI fits uniquely into the requirement for a long-term residential interagency program focused on the executive role as being increasingly generalist in nature and one imposing special challenges of both leadership and management.

Briefly put, the existence of the FEI mitigates against the development of redundant and less cost effective approaches to meeting a rather sharply defined--and somewhat limited--set of market needs for executive development training.

GORE

Ic. Historically, the Charlottesville site for the FEI was identified by the General Services Administration in the spring of 1967. That identification occurred during an intensive search undertaken by GSA offices located in Washington, DC, Philadelphia, and Atlanta. The Charlottesville site was among several referred to the U.S. Civil Service Commission officials for consideration and it was the one most readily available. Actual lease negotiations and leasing was undertaken by the General Services Administration in 1968.

The following criteria were considered in the initial location of The Federal Executive Institute: (1) an optimum distance from Washington, DC -- far enough away to discourage participants from living at home, so as to maintain an intensive and rigorous residential program, and close enough to permit convenient access to resources of the Nation's capital; (2) proximity and complete access to highest quality university resources in all major disciplines; (3) immediate access to superior, complete medical and dental services, appropriate to needs of participants in the age, economic, and social levels of federal executives; (4) proximity to varied business services; (5) proximity to diverse public civic services; and (6) a self-contained, retreat environment, away from work and family demands, conducive to maximum utilization of time and supportive of intense study and reflection.

A further consideration in the initial establishment of FEI in Charlottesville was accessibility in terms of training participants and visiting resource persons. Both public transportation via plane, bus, train, and private highway access are essential to FEI's operation, and despite its relatively small size as a city, Charlottesville is served exceptionally well in these respects.

In 1973, a major Civil Service Commission task force, composed of representatives from the Bureau of Training, the Bureau of Executive Manpower, the Bureau of Management Services, the Bureau of Policies and Standards, and The Federal Executive Institute, met to reexamine executive and managerial training needs and to reconsider FEI's location. At that time, alternative sites were again examined. The relationship between The Federal Executive Institute and the University of Virginia was evaluated, and the task force concluded that the University of Virginia had not only maintained a superior reputation, which would again justify its selection as a site for a federal executive and managerial training center, but that it had also demonstrated over a six-year period a

capacity to work with The Federal Executive Institute in meeting a wide array of executive training facility requirements. Experience of the last three years continues to support that conclusion. University services to FEI since it was established in 1968 have been virtually free or at actual cost since the University has not been required to seek financial profit from the relationship. As a relatively tiny organization, The Federal Executive Institute could not begin to pay for the rich resources associated with this major university, which are essential to the Institute's operation.

This conclusion is reinforced by further exploration of alternative sites during 1974 and 1975 and in the early 1980's in connection with Commission studies of possible development of an enlarged facility for executive and managerial training. Alternative sites were first explored by a Commission task force in 1973-74, and alternatives were again examined in 1975 at the request of the Subcommittee on Public Buildings and Grounds of the Senate Committee on Public Works. During these reviews of facility alternatives, consideration was given to existing federal facilities, possible privately-held facilities, and alternative new construction sites.

Reviews undertaken at the direction of the Director of OPM in the early 1980's, as well, reconfirmed the validity of original criteria for location. In addition, years of successful operation produced overwhelming support from both satisfied executive alumni and "their sending agencies" for the continued operation of the FEI in Charlottesville, Virginia.

This outpouring of support culminated in the early 1990's with an extensive remodeling and refurnishing of the original buildings on the FEI grounds to provide a state-of-the-art executive development facility capable of providing quality programs and services beyond the turn of the century.

GORE

IIIa. The FEI has special capabilities, and a long record of experience, in looking at emerging issues and trends, and the difficulties attendant in their specific formulation as policy proposals, and in their consequent implementation, monitoring, and evaluation.

Current and former faculty, a legion of current and retired high-level executive alumni, and a choice physical location with the requisite high-tech supporting infrastructure suggest that the FEI -- both as an institution and a physical place -- can serve an important role in identifying, managing, and reviewing the widest range of policy and program changes.

In addition, its on-going long-term residential programs offer an absolutely unique audience of high-level government managers in an academic setting that provides the time for thorough presentation and discussions of initiatives between senior administration officials and senior executives, as well as among executives themselves, from the full range of federal agencies, and between faculty and executives during the course of the entire program.

Beyond this, the FEI's long record of success in its work team development programs, including those oriented specifically to the special challenges and opportunities represented by political/career teams, is potentially a remarkably useful resource for high level administration change programs and initiatives.

GORE

IIIb. The FEI has special resources, talents, and experience appropriate to managerial change initiatives, particularly those involving organizational change, structural change, revisioning, TQM and customer relations, and a wide range of personnel management changes, including the management of diversity, succession planning, and orientation to the executive role, to name a few.

Short term workshops, briefings, and orientations -- at the FEI, in Washington, or in field locations -- are all possibilities.

Focused work team development programs would, in addition, be powerful additions to the change arsenal.

GORE

IIIc. The Federal Executive Institute can add two very different kinds of support to the Administration's change initiatives:

1. The FEI is an excellent forum for high level administration speakers to present their proposals for changes to one of the most important groups of people in the entire change process -- senior executives who will be key players in the successful implementation of change plans. Ideas can be floated and tested in an academic environment both challenging and yet supportive, comprised of executives from the widest imaginable range of federal agencies and backgrounds.
2. FEI's special short programs, particularly its work team development programs and its political/career programs offer focused and targeted designs for grappling both with change ideas and the special challenges of implementation represented by those ideas.

GORE

IIIId. The Federal Executive Institute has a 25-year history of challenging executives to see the executive role as one where the responsibility for visioning and leading change is paramount. The entire design, and each component of the academic curriculum, contributes to this objective twenty-four hours a day.

Beyond this, however, The Federal Executive Institute is unique in providing continuing support after graduation to both the individual executive and to the executive's work organization. Updates on change initiatives and support to work teams planning and implementing change have characterized the FEI's after-graduation support philosophy during this same 25-year period.

Given the FEI's singular focus on senior executives and their leadership and managerial roles, no other approach would be thinkable. The FEI's only focus is on the successful leaders, the best and the brightest, and it seeks and strives constantly to enhance its capacity to carry out that challenging and demanding mission.

Attachment 10

Document in support of the procurement of the
Eastern Management Development Center

EASTERN MANAGEMENT DEVELOPMENT CENTER
Procurement of a Permanent Facility

There were five proposals/offers for EMDC. This is where we now stand on each of them:

Charles County Community College and the Crofton Country Club were eliminated from the competition after the initial evaluation.

- * Charles County was only adequate technically and too expensive
- * Crofton was weak technically.

Western Maryland Corporation (Westminister, MD) was excellent technically, but expensive.

- * build-to-suit
- * clear understanding of what we are trying to accomplish
- * close relationship with Western Maryland College
- * lease rate (\$50 per square foot) considerably above appraised values in the area
- * commits OPM to nearly \$20 million in costs regardless of how much business we do
- * latest food and lodging rate (\$99) falls between Shepherdstown and Lancaster.

Status: As a result of discussions with this bidder, they have raised the possibility of building a smaller facility for us and lower rates a bit. At the same time, they would make OPM liable for a high minimum level of room nights. This shifts a lot of the risk to OPM.

Lowe Development Co. (Shepherdstown, WV) was good technically and priced reasonably.

- * build-to-suit
- * design/layout problems suggest lack of clear understanding of OPM needs
- * need strong assurances that the contractor will work with us in building design
- * lease rate reasonable (\$14) and in line with comparables in the area
- * bidder concern about true occupancy rates
- * latest food and lodging bid (\$112) highest of all bids

Hotel Brunswick (Lancaster, PA) had the lowest bid, but was only adequate technically.

- * renovation and expansion of current EMDC facility
- * design potential limited by existing structure with many levels, odd shapes, etc.
- * flow within the training space would not be very efficient
- * price very good, lease rate (\$14) and \$90 participant day
- * concern about commitment to addressing maintenance of older building
- * overhauling facility will likely disrupt EMDC programs

Best and Final Offers due 3/21.

TALKING POINTS FOR JIM KING

Procurement of the Eastern Management Development Center

BACKGROUND

We have received a number of responses to our request for proposals for a permanent home for the Eastern Management Development Center (EMDC). We eliminated one bid at the start for being simply non-responsive: so little was submitted that we could not judge it at all. The site selection team has received the proposals, visited the sites of all the qualifying bids, and rated each proposal.

The prices of each bid have also been established and verified.

Putting together the technical ratings and their prices has now produced a set of attractive bids that are judged to have a chance of being selected for the award.

ISSUE

It is clear from the technical ratings and prices that one bid -- from Charles County Community College -- does not have a chance to win, so the contracting officer has correctly decided to eliminate it at this point.

This bidder has no real chance of altering the proposal to the point where it could stand a reasonable chance of getting the contract.

- ◆ In the technical ratings, this bid received a score in the middle range.
- ◆ But its price is the highest of all the offers.
- ◆ Very importantly, most of the costs are fixed, meaning that OPM pays for bedrooms whether or not they are used. (The other bids charge only for the rooms actually used.) This puts all the risk, if business is slow, on OPM, rather than putting some of it on the vendor.

SUMMARY

OPM has a wide range of bids in front of it. We can spend a lot for a very fine facility, or not very much for a mediocre one.

Charles County offers us a middle range facility at a high price.

We think the bid cannot become the winner because anything that lowers price almost has to lower quality.

Attachment 11

Brochure for the Center for Executive Leadership

Attachment 12

Brochure for the
Management Conference Service
Of the
Eastern Management Development Center

Attachment 13

The Leadership Journey:
Programs and Seminars of the
Federal Executive Institute
And
Management Development Centers

Attachment 14

Brochure for the
Executive Master of Public Administration Degree
In partnership with the
University of Colorado, Denver

Attachment 15

Organization Values for the
Office of Executive and Management Development

The Office of Executive and Management Development

Our Vision: We Develop Great Leaders to Advance Excellence in Government

Our Motto: Great Leaders for Great Government

Our Mission: We serve Government leaders and organizations to improve performance and enhance leadership. As a dynamic Federal government organization, we commit to public service, excellence, quality and continuous learning through:

- Premier interagency residential training
- Unique customized programs and consulting
- Innovative customer focused services

Our Strategies:

- 1) Build Strategic Partnerships:** We form partnerships that foster knowledge generation, best practices and enhanced services in the area of organizational leadership; We form comprehensive, long-term alliances with specific "key agencies" that result in identifiable benefits to individual executives, teams and overall agency performance; We form alliances with professional associations, foundations, and other government organizations to develop state-of-the-art products and services.
- 2) Grow our Technology Capability:** We aggressively pursue the use of technological innovations to improve learning outcomes for our customers and clients, making life easier for our clients and ourselves (registration, sales, billing); improve our own work processes, and support new business opportunities.
- 3) Optimize our Financial Performance:** We are good stewards of the People's money because we develop and maintain a financial system that optimizes revenue growth and mix, cost reduction and productivity improvements, asset utilization, and investment.
- 4) Grow Our Business** by identifying and focusing on customer needs: We reach out to understand what our clients, consumers, and constituents need from us, organize our understanding to respond with the right mix of training and services at the right price, proactively communicate our vision, capability, and results to influence our customers to enroll in our programs and subscribe to our services.
- 5) Create a World-class Work Environment** where values, behaviors, and incentives are aligned: We will achieve this by developing our own leadership capability; offering and welcoming open communication; ensuring resources and tools to do the job well; expecting and supporting staff training, professional, and career development; allowing opportunities to try new things; valuing and demonstrating diversity; enabling employees to balance personal and professional needs; creating a healthy and pleasant workplace; rewarding individual and group contributions; using flexible and lean personnel, procurement, and performance management systems.
- 6) Pioneer the Development of Knowledge Capture, Knowledge Sharing, and the Use of Effective, Innovative Learning and Performance Improvement Technologies:** We learn from our participants and strategic partners what works best to address a range of government leadership and management challenges. This "knowledge-creation" will be made available on demand—anytime and anywhere—to help our government work better.

Our Business Values:

Customers: Our clients are our reason for being, and we consider them our partners. They are our priority in all discussions, decisions and actions. We strive to continually amaze our customers with our first class service. We build long-term relationships with our customers based on honesty, professionalism, and trust.

Diversity: We proactively seek diversity in our people, products, and services as a business necessity and a moral imperative. We strive to be an organization with a workforce that reflects America.

Using Technology to Improve Service: We aggressively pursue the use of technological innovations to improve programs, operations, and learning outcomes for our customers and staff. Technology is the servant of our service.

Solid Financial Performance: We are good stewards of the People's money. We are a business operation that takes responsibility for our decisions. Our financial actions and operations are based on honesty, thoroughness, and efficiency. We will develop and maintain a sound financial system.

Unity: We develop and deliver products and cohesive business strategies that maximize the effectiveness and synergy of OEMD as a whole, while preserving the organizational identities of EMDC, FEL and WMDC.

Our People Values: (GRIT)

Growth: We encourage continuous learning and growth by renewing ourselves both personally and professionally; collaborating and cooperating to accomplish our vision; taking risks; sharing ideas by asking and listening; tooting for one another's success; promoting creativity and innovation.

Respect: We value and respect all employees by celebrating their differences; showing appreciation for their contributions; treating each other with candor, honesty, and compassion; supporting a balance between home and work; promoting fun, honor, and play in our work place.

Integrity: We demonstrate integrity by speaking and acting truthfully; following through on commitments; practicing high ethical standards in everything we do; holding each other accountable for what we promise; taking pride in our commitment, striving for excellence, and continuously improving the service we deliver.

Trust: We build trust within the organization by keeping others' interests in mind when making decisions; seeking to understand others' perspectives; celebrating our successes, admitting our mistakes, and learning from both; fostering open communications, directly with those involved, based upon, courage, sincerity, and respect.

Barbara Darwin Lester

Joe Weward

Barbara Smith

Robert West



Attachment 16

Work Plans, Work Reports and Performance Reports
For the Office of Executive and Management Development
For the Term of the Clinton-Gore Administration
FY 1993-2000

**OFFICE OF EXECUTIVE AND MANAGEMENT DEVELOPMENT
PERFORMANCE PLAN
FY 2000**

OPM STRATEGIC PLAN GOAL III: Serve: OPM's high quality, cost effective human resources services meet the evolving needs of Federal agencies, employees, annuitants and the public.

OPM SUB-GOAL #8: Participation in OPM's executive and managerial training programs is increased and income and costs balanced.

OEMD GOAL #1: Increase the efficiency and productivity of Federal agencies and develop the leadership skills of senior level executives by providing high quality, affordable, interagency leadership training for members of the SES and high potential GS-15 managers who are candidates for the SES

Objectives	Means/Action Steps	Targets for Accomplishment	Intended Results	Performance Measures/Indicators
1. Ensure LDS, CEL and MDC curricula are responsive to current executive and management needs.	Continue OEMD Curriculum Review: <ul style="list-style-type: none"> • Continue curriculum review process established in September, 1998 • Engage participation from key stakeholders (NPR, OERM, etc.) in curriculum development process • Deliver 2000 FEI & MDC courses based on design developed in curriculum review meetings. 	Quarterly Updates Quarterly Updates FY2000	Current, relevant curriculum tied to ECQs and competencies needed by Government supervisors, managers, and executives to function effectively as Government leaders now and into the 21 st Century.	Maintain or improve program evaluation ratings (overall rating 4.5 on 5.0 scale) for LDS and MDC Core and CEL Open Enrollment Programs. Increased Space Sales for LDS & MDC core management programs. Increase CEL Open Enrollments to 80% of Annex capacity. Demonstrated, consensus driven linkages in FEI, CEL and MDC programs
2. Develop collaborative relationships needed to bring added expertise in FEI and MDC programs	Identify and collaborate with other Executive & Management Development Programs similar to FEI/CEL/MDC programs.	One contact each quarter Potential contacts: <ul style="list-style-type: none"> • Other gov't agencies • Private sector • University-based programs 	Joint meetings to discuss curriculum issues. Joint research efforts, faculty exchanges, and other joint efforts to be determined.	Demonstrated progress on at least one research project, faculty exchange, or other effort. Continued collaboration.

OPM STRATEGIC PLAN GOAL III: Serve: OPM's high quality, cost effective human resources services meet the evolving needs of Federal agencies, employees, annuitants and the public.

OPM SUB-GOAL #6: Form comprehensive long-term strategic alliances with key agencies that will result in identifiable benefits to individual executives, teams, and agency performance.

OEMD GOAL #1 (Continued): Increase the efficiency and productivity of Federal agencies and develop the leadership skills of senior level executives by providing high quality, affordable, interagency leadership training for members of the SES and high potential GS-15 managers who are candidates for the SES

Objectives	Means/Action Steps	Targets for Accomplishment	Intended Results	Performance Measures/Indicators
<p>FEI: Leadership for A Democratic Society Program (LDS)</p> <p>3A: Conduct core programs for GS-15/SES</p>	<ol style="list-style-type: none"> 1. Proactively streamline the pre- and post-registration process. 2. Conduct "share sales" to Federal departments/agencies, state/local governments, and international representatives. 3. Provide relevant, competency driven programs. 4. Evaluate programs. <ul style="list-style-type: none"> • Collect/collate data • Report & analyze data 5. Implement appropriate changes in program operations 	<ol style="list-style-type: none"> 1. Revise processes to reduce time/effort/cost, FY 2000 2. September 1999 for (FY2000), September 2000 for (FY2001) 3. Offer ten programs grounded in ECQs and other competencies needed by senior public executives. 4. Data collected/collated at end of each program, Reported/analyzed 2 wks. following each program. 5. First FEI Action Learning Program piloted in FY2000. Incorporate new and revised 360 degree assessment instruments. 	<ol style="list-style-type: none"> 1. Smoother pre-program and first day experience; less cost 2. Capacity audience made up of senior managers at GS-15/SES level; 680 participants with projected revenue of \$6,220K 3. Capacity audience made up of senior managers at GS-15/SES level; 680 participants with projected revenue of \$6,220K 4. Better data on learning, on-the-job use of skills, impact on agencies and obstacles to on the job skill application; all leading to higher quality programs. 5. Focused version of core program targeted at real organization problems. competencies, versatile instruments. 	<ol style="list-style-type: none"> 1. End of course evaluation, focus group reports, log of improvements made. 2. Classes filled to 95% capacity. Actual revenue within 5% of projection. 3. Classes filled to 95% capacity. Actual revenue within 5% of projection 4. Maintain or improve ratings (overall rating 4.5 on 5.0 scale) AND evaluation of at least two programs at Level 2-4 demonstrating behavioral change and organizational impact. 5. Focus group and faculty feedback plus end of course evaluations. Existence of enrollment interest. No Y2K problems with instruments.

Objectives	Means/Action Steps	Targets for Accomplishment	Intended Results	Performance Measures/Indicators
MDCs 3B: Conduct core and non-core programs for GS-12 to GS-15 level. Conduct Supervisory Training & Team Training for GS 9-11 level.	Conduct "share sales" and open enrollments with Federal departments/ Agencies, state/local governments, and international representatives.	September, 1998 (FY1999) September 1999 (FY2000)	Capacity audience made up of managers at GS-12 to CS 15 level. Total # participants: 4730 Projected Revenue: \$12,682,000	Classes filled to optimum capacity. Baseline established for measurement in 2001.
	Evaluate programs.	Continuous improvements with formal reports at end of year.	High quality programs	Maintain or improve ratings (overall rating 4.5 on 5.0 scale). Conduct one study at Level 3 or Level 4 demonstrating behavioral change and results impact.
3C: Deliver quality orientation programs for new PMI members.	Deliver programs.	3 per year or as needed	New PMIs understand and value their larger role in government and exercise their leadership and other responsibilities from a corporate (vs. a parochial agency) perspective to lead change and promote a better government.	Maintain or improve ratings (overall rating 3.5 on 5.0 scale).
3D: Administer the Y2000 Presidential Quality Award Program.	Develop criteria Convene examiners Conduct Site Visits Convene Panel of Judges Plan and implement joint Quality Conference with NPR	Initial evaluation complete October 1999 Site reviews complete January 2000 Judges recommendations March 2000 June 2000	Recognition and re-enforcement of executive success	Target dates met. Conference Evaluation Results.

OPM STRATEGIC PLAN GOAL III: Serve: OPM's high quality, cost effective human resources services meet the evolving needs of Federal agencies, employees, annuitants and the public.

OPM SUB-GOAL #7: Form comprehensive long-term strategic alliances with key agencies that will result in identifiable benefits to individual executives, teams, and agency performance.

OEMD GOAL #2: Form comprehensive long-term strategic alliances with specific "key" agencies that will result in identifiable benefits to individual executives, teams and overall agency performance. This includes partnerships with organizations in the area of executive leadership to form knowledge generations, best practices and enhances services.

Objectives	Means/Action Steps	Targets for Accomplishment	Intended Results	Performance Measures/Indicators
<p>FEI: Center for Executive Leadership 4A: Strengthen open enrollment programs and offer customized courses through Center for Executive Leadership (CEL)</p>	<p>Maintain appropriate existing strategic partnerships with key agencies and design customized programs to meet agency specific needs.</p> <p>Develop strategic partnerships with additional agencies and design customized programs to meet agency specific needs.</p> <p>Deliver custom programs during 90% of available, unscheduled periods for LDS or open enrollment CEL courses. Deliver programs in Annex at 80% capacity overall.</p>	<p>Use agency focus groups, faculty and evaluation results to identify desirable offerings. Specific workshops designed and promoted by 10/99</p> <p>Reprint promotional brochure by 1/2000</p> <p>Key programs offered to key customers; OSD, Treasury, NOAA, USAID</p> <p>Improved programs as indicated by evaluation results.</p>	<p>Eighteen open enrollment programs that are relevant and useful to customer agencies.</p> <p>Improved program brochure that clearly identifies the benefits of programs, and is both attractive and timely.</p> <p>Clear indication of which programs, methodologies, faculty, etc., are on target and effective.</p> <p>Total # participants: 960 Projected Revenue: \$3,488,971</p>	<p>Open enrollment program evaluations include ratings of 4.5 or better on 5.0 scale.</p> <p>Anecdotal feedback from customer agencies on both program content, brochure, and both pre- and post-program experience.</p> <p>Log or record of program improvements resulting from evaluative efforts</p> <p>Open enrollment programs at 80% of annex capacity</p> <p>Two evaluations completed at Level 3-4 to measure impact on the job.</p>
<p>4B: Offer CEL Consulting Services</p>	<p>Develop consulting services and faculty pool that meet agency specific needs</p>	<p>On-going</p>	<p>Agencies receive high quality, on-going consulting support in areas of strategic planning, high performance organizations, team building, and organizational change.</p>	<p>Written feedback/analysis of the intervention level of effort from consultants</p> <p>Customer evaluation of effort and outcomes related to agency needs and goals.</p>

OPM STRATEGIC PLAN GOAL III: Serve: OPM's high quality, cost effective human resources services meet the evolving needs of Federal agencies, employees, annuitants and the public.

OPM SUB-GOAL #7: Form comprehensive long-term strategic alliances with key agencies that will result in identifiable benefits to individual executives, teams, and agency performance.

OEMD GOAL #2: Form comprehensive long-term strategic alliances with specific "key" agencies that will result in identifiable benefits to individual executives, teams and overall agency performance. This includes partnerships with organizations in the area of executive leadership to form knowledge generations, best practices and enhances services.

Objectives	Means/Action Steps	Targets for Accomplishment	Intended Results	Performance Measures/Indicators
MDCs: New Business Directions 5A: Develop strategic partnerships with key agencies to provide management development solutions	Drive increases in enrollments in core curriculum. Drive increases in custom-designed programs and distance learning solutions.	Key Agencies to Target: <ul style="list-style-type: none"> • OPM • HHS • NAVY • Agriculture 	High quality programs that include skills appropriate to GS-9 through GS-15 level managers and targeted to agency-specific needs. Targeted revenue: \$100,000	New business with five agencies. Develop one-long term strategic partnership. Increases in # of enrollments in MDC residential programs from targeted agencies (Target 50 spaces). Evaluations of new programs include ratings of 4.4 or better on 5.0 scale.
MDCs: 5B: Develop Outside Projects	Drive increases in space utilization Drive additional revenues from custom design programs.	Key targets: <ul style="list-style-type: none"> • Center for Disease Control • Defense Commissary Agency • Army Acquisition Agency 	WMDC Revenue = \$325K EMDC Revenue = \$700K Total Revenue = \$1025K	Projected revenues met or exceeded.

OPM STRATEGIC PLAN GOAL III: Serve: OPM's high quality, cost effective human resources services meet the evolving needs of Federal agencies, employees, annuitants and the public.

OPM SUB-GOAL #7: Form comprehensive long-term strategic alliances with key agencies that will result in identifiable benefits to individual executives, teams, and agency performance.

OEMD GOAL #3: Reach out to understand what our clients, consumers, and constituents need from us, organize our understanding to respond with the right mix of training and services at the right price, and pro-actively communicate our vision, capability, and results to influence our customers to enroll in our programs and subscribe to our services.

Objectives	Means/Action Steps	Targets for Accomplishment	Intended Results	Performance Measures/Indicators
<p>6: Develop OEMD marketing program that contributes in measurable ways to growth of the business</p>	<p>Develop and implement appropriate promotions programs for OEMD</p> <ul style="list-style-type: none"> • Program Guide[s] and Brochures • OEMD presence in external forums • Web-based vehicles for promotions • ECQ Outreach Vehicle • Organize key agency visits <p>Conduct ROI studies on marketing vehicles</p> <ul style="list-style-type: none"> • Program Guide[s] and Brochures • #888 Number • OEMD Exhibits • OEMD Web page • ECQ Outreach Vehicle • Print Advertisements 	<p>Available April 2000 12 conferences in FY 2000 March 2000 20 by June 2000 30 by June 2000</p> <p>Measures in place by 11/99 Reports quarterly</p>	<p>Increased opportunities for consulting/strategic partnerships. Increase enrollments in core/non-core programs.</p> <p>Select most effective vehicles</p>	<p>2% increase over FY99 in residential interagency registrations .</p> <p>50 leads for custom and consulting projects.</p> <p>Number and qualifications of responses to marketing vehicles.</p> <p>Baseline established for cost/registration ratio of promotional material.</p>

OPM STRATEGIC PLAN GOAL III: Serve: OPM's high quality, cost effective human resources services meet the evolving needs of Federal agencies, employees, annuitants and the public.

OPM SUB-GOAL #7: Form comprehensive long-term strategic alliances with key agencies that will result in identifiable benefits to individual executives, teams, and agency performance.

OEMD GOAL #3: Reach out to understand what our clients, consumers, and constituents need from us, organize our understanding to respond with the right mix of training and services at the right price, and pro-actively communicate our vision, capability, and results to influence our customers to enroll in our programs and subscribe to our services.

Objectives	Means/Action Steps	Targets for Accomplishment	Intended Results	Performance Measures/Indicators
<p>6: Develop OEMD marketing program that contributes in measurable ways to growth of the business (Cont'd)</p>	<p>Develop best in class Customer Relationship Management System</p> <ul style="list-style-type: none"> • Competitively select top class system • Gather and enter data • Test email communication • Launch email promotion <p>Align marketing and sales</p> <ul style="list-style-type: none"> • Marketing Manager works with sales manger to: <ul style="list-style-type: none"> • implement sales improvement recommendations • identify other improvement opportunities • train staff • Joint planning and action for FY 2001 Agency Account launch • Support Individual Registration sales <p>Generate internal and external customer support for marketing program</p> <ul style="list-style-type: none"> • Marketing Advisory Group • Marketing Highlights Report • EMD/Marketing.com • Directors Roundtable 	<p>January 2000 On-going Jan. – Jun 2000 September 2000</p> <p>December 1999 December 1999</p> <p>January 2000 January 2000</p> <p>January 2000 Bi-weekly On-going January, 2000</p>	<p>Efficient, trackable capacity to do relationship/permission marketing with all key managers and organizational units in the Federal Government</p> <p>Leverage email for marketing communication</p> <p>Sales growth in Agency Accounts and Individual Registration</p> <p>Value-adding input: broad and deep support</p>	<p>125 SES managers entered in system</p> <p>1 major 2-way email promotion</p> <p>Custom/consulting staff uses the system</p> <p>10% increase in active Agency Accounts</p> <p>500 Individual Registrations</p> <p>60% EMD staff rating on internal survey (marketing as adding value) 25 key agency officials participate</p>

OPM STRATEGIC PLAN GOAL III: Serve: OPM's high quality, cost effective human resources services meet the evolving needs of Federal agencies, employees, annuitants and the public.

OPM SUB-GOAL #7: Form comprehensive long-term strategic alliances with key agencies that will result in identifiable benefits to individual executives, teams, and agency performance.

OEMD GOAL #4: Aggressively pursue the use of technological innovations to improve learning outcomes for our customers and clients, make life easier for our clients and ourselves (registration, sales, billing,), improve our own work processes, and support new business opportunities.

Objectives	Means/Action Steps	Targets for Accomplishment	Intended Results	Performance Measures/Indicators
7: Increase technology capacity to deliver OEMD programs	Implement business plan to invest retained earnings in technology "backbone" (OEMD intranet, web server, database server) to support and provide OEMD virtual collaboration capability, on-line registration, electronic pre-/post materials, on-line surveys, competitive business proposals, case study and best practices databases, and electronic communities of practice.	Business plan complete by September 1999. Implementation FY2000	Professionalize program product. Provide greater access to program speakers and participants. Provide and model virtual collaboration concepts and techniques.	OEMD Virtual collaboration capability, on-line registration, electronic pre-/post materials, on-line surveys, competitive business proposals, case study and best practices databases, and electronic communities of practice available in FY2000. Qualitative evaluations indicate OEMD and customer satisfaction with quality of program delivery. Quantitative evaluations maintain or improve ratings (overall ratings 4.4 on 5.0 scale).
	Upgrade FEI/MDC interoffice communications consistent with OPM IT Architecture (e.g., Microsoft Outlook, Microsoft Suite) Integrate Training Server into technology backbone	December 1999 for Microsoft Outlook June 2000 for Microsoft Suite FY 2000	Develop office automation platform consistent with OPM Continuity of infrastructure technology capability	On time delivery Increased capacity to communicate effectively with OPM and other government agencies. Feedback from OEMD Leadership Team, users, OPM CIO for compliance and interoperability.

OPM STRATEGIC PLAN GOAL III: Serve: OPM's high quality, cost effective human resources services meet the evolving needs of Federal agencies, employees, annuitants and the public.

OPM SUB-GOAL #7: Form comprehensive long-term strategic alliances with key agencies that will result in identifiable benefits to individual executives, teams, and agency performance.

OEMD GOAL #5: Pioneer the development of knowledge capture and knowledge sharing as we use effective, innovative learning and performance improvement technologies for leadership and executive education. Learn from our participants and strategic partners what works best to address a range of government leadership and management challenges. This "knowledge-creation" will be made available on demand – anytime and anyplace – to help our government work better.

Objectives	Means/Action Steps	Targets for Accomplishment	Intended Results	Performance Measures/Indicators
8: Develop capacity to communicate with participants and graduates anytime/anyplace	Establish continuous learning web capability that enables participants and graduates to: <ul style="list-style-type: none"> • Complete OEMD pre-program survey • Receive and send program information Communicate with OEMD faculty and each other on learnings and best practices.	FY2000	Completion of majority pre-and post-program work on the web. Enhanced faculty communication with participants/graduates	Staff time and printing costs saved Faster access to pre-work by participants as measured by participant evaluation Improved satisfaction with pre-program process by participants as measured by program evaluations.
9: Capture best practices in leadership and improving organizations	Implement process for collecting best practices and conducting surveys in targeted areas (e.g., diversity, team development) from OEMD program participants.	FY2000	OEMD becomes a source of best practice and survey information that cannot be found elsewhere in government; information enhances curriculum offerings	Maintain or improve program evaluations (4.5 on 5.0 scale).
10: Link participants/ graduates to best practices	Publish best practice and survey data on the OEMD web site	FY2000	Build customer loyalty and future business	Minimum of two hot links to external best practice sites Increased use of web site (e.g., # of inquiries to site).

OPM STRATEGIC PLAN GOAL III: Serve: OPM's high quality, cost effective human resources services meet the evolving needs of Federal agencies, employees, annuitants and the public

OPM SUB GOAL #7 : Form comprehensive long-term strategic alliances with key agencies that will result in identifiable benefits to individual executives, teams, and agency performance.

OEMD GOAL #6: Create a Professional Work Environment that Fosters Effective Customer Service, Productivity, Diversity, and Innovation.

Objectives	Means/Action Steps	Targets for Accomplishment	Intended Results	Performance Measures/Indicators
<p>II: Implement business plan to invest in the development of a diverse OEMD faculty and staff and a productive work environment.</p>	<p>Identify hiring, diversity, and development needs for OEMD faculty and staff to support continued growth and best-in-class service.</p>	<p>In progress</p>	<p>Continuously improve customer service.</p>	<p>80% of OEMD goals are met or exceeded.</p>
	<p>Implement an OEMD-wide performance management system and goal sharing program</p>	<p>April 2000</p>	<p>Increase diversity in faculty and staff.</p>	<p>Increases in overall percent of minority employees in faculty and staff (with emphasis on Hispanic representation).</p>
	<p>Conduct OEMD-wide All Hands Meeting</p>	<p>January 2000</p>	<p>Increase skills, productivity, and morale of faculty and staff.</p>	<p>Increase in employee job satisfaction as measured by improvements in three areas of Organization Assessment in FY 2000:</p>
	<p>Establish Alternative Work Schedule Matrix that identifies appropriate arrangements for each job title in OEMD.</p>	<p>October 1999</p>		<p>Communications, Rewards/Recognition, Leadership</p>
	<p>Establish 2-week downtime rule across OEMD</p>	<p>October 1999</p>		<p>Fewer comments on participants evaluations regarding lack of diversity in faculty membership.</p>
	<p>Publish OEMD Quarterly Newsletter</p>	<p>October 1999</p>		
	<p>Conduct Annual Organization Assessment</p>	<p>May 2000</p>		

OPM STRATEGIC PLAN GOAL III: Serve: OPM's high quality, cost effective human resources services meet the evolving needs of Federal agencies, employees, annuitants and the public.

OPM SUB-GOAL #8: Participation in OPM's executive and managerial training programs is increased and income and costs balanced.

OEMD GOAL #7: Be good stewards of the People's money by developing a financial system that optimizes revenue growth and mix, cost reduction and productivity improvements, and asset utilization and investment.

Objectives	Means/Action Steps	Targets for Accomplishment	Intended Results	Performance Measures/Indicators
<p>12: Maximize use of available financial resources to accomplish program goals and objectives.</p>	<p>Establish financial targets for Revolving Fund Programs.</p>	<p>October 1999 for 2000 targets. August 2000 for Y2001 targets.</p>	<p>Program is financially sound.</p>	<p>Retained earnings balanced. Project income and costs within tolerances of \$250K+ and -\$125K.</p>
	<p>Manage programs so that a retained balance for reserves and contingencies is maintained.</p>	<p>Quarterly updates</p>		
	<p>Ensure appropriate management controls are in place and observed.</p>	<p>Quarterly updates</p>	<p>Stable financial architecture</p>	<p>Improved accuracy; reduced incidents of errors, improved forecasting of projected revenue, fully loaded program costs.</p>
	<p>Implement business case to restructure internal financial system.</p>	<p>Quarterly updates</p>		
	<p>Develop/maintain OEMD Balanced Scorecard</p>	<p>January 2000</p>		