C. MANAGING FOR RESULTS

C.1 Managing for Results Submission Requirements

Important Notes for FY 2025:
- The Managing for Results (MFR) template for FY 2025 will be distributed by the end of July.
- **Agencies will be asked to fill out a Google form along with their MFR template submission. The link to this form will be sent out when templates are distributed.**
- **Unlike recent years, prior year data (FY 2019 to FY 2022) will not be locked for editing.** DBM found that, while this process helped to protect data integrity, it slowed the process for agencies that needed to revise this data. Instead, agencies will be asked to 1) highlight revised prior year actuals in yellow; and 2) confirm data integrity in the Google form and Certification Statement. The "DO NOT EDIT" tab and all metric names/codes will remain locked for formatting consistency.
- All agencies will submit the MFR on one combined due date of **September 1, 2023**. This is NOT the same as the due date for your budget request, which is different for each agency.
- MFR+: Cabinet-level agencies, and a handful of others, are expected to complete a more comprehensive revision of their strategic plan templates during summer 2023, in collaboration with the Governor's Office. See below (Section C.3) for implications on expectations of Performance Discussion and Data Definitions and Controls.
- DBM asked agencies to submit MFR template changes by June 9, 2023. This allows DBM to update the Excel-based templates and distribute them by July.
- Data submitted by agencies in the template fall into two categories: "MFR" (or "M") and "DBM/DLS only" (or "D"). DBM will only publish the "MFR" data in the agency's official MFR plan.
- Data Definitions and Controls Procedures columns in the MFR Excel template must be completed for all "MFR" published measures. While not required, DBM highly recommends completing this data for the "DBM/DLS" metrics as well.
- MFR+ agencies should provide Performance Discussion for all metrics tied to the Moore-Miller State Plan. Otherwise, the Performance Discussion column only needs to be completed for those metrics that have a notable trend worth explaining.

MFR Submission Files: Each agency must submit two electronic files - Section C.2 and Section C.3 provide more guidance for each component. Note that space for performance discussions and data definitions and control procedures are included within the MFR Excel template.

- MFR Excel template (**mandatory**): DBM will e-mail each agency an MFR template to complete no later than late July 2023. Each agency must use this revised electronic file to create the FY 2025 MFR submission – **do not use a prior year MFR template or you will be required to resubmit**. Agencies should review the template to check for any errors (including verifying past year actual data), but should not change the format or insert new measures or objectives. DBM will ask agencies to resubmit if the files contain alterations.
    - Performance discussions (**mandatory**): See Section C.3 for guidance.
    - Data definitions and control procedures (**mandatory**): See Section C.3 for guidance.

- Signed data certification statement (**mandatory**): Submit as a PDF file.

Submitting MFR Files: Agencies should e-mail MFR documents to **oba.mfr@maryland.gov** and their DBM budget analyst by **September 1, 2023.** The subject line of the e-mail must list the applicable budget code

for the agency and the acronym for each file attached, for example "H00 ET, C." This example indicates that the Excel template (with the performance discussion and data definitions and control procedures) and the data certification are attached. **Hard copies are not needed**. The file name for each document must include the budget code, the acronym that identifies the subject of the file, and the fiscal year. When agencies submit revised files after the initial file submission, they should include the date of revision in the file name, for example "H00 ET 23 revised 11-20-22."

The acronyms and examples of file names are shown below:

Acronym:	Examples of file names:
ET = Excel template (*now includes Performance Discussion*	
and Definition and Controls)	**H00 ET 24**
C = Certification statement	**H00 C 24**

Excel Template: Please reach out to your DBM budget analyst and Jennifer Spangler (oba.mfr@maryland.gov) if you have any questions or concerns about the Excel template that DBM created for your agency. Some important notes for completing the Excel template:

- "MFR Do Not Edit" and "All Data" Tabs: The Excel template has three tabs. The "All Data" tab is the only tab the agency needs to update. Data entered in the "All Data" tab will automatically populate the "MFR Do Not Edit" tab. The "DC Section Key" tab provides descriptions of what information to include in the Data Definitions and Control Procedures section of the "All Data" tab.

- Few changes to the MFR may occur in the fall: Discussions about changes to the MFR should occur during the spring, as DBM has encouraged in the past. Agencies desiring to change goals, objectives, and measures after June 9 will be considered on a case-by-case basis.

- Explanatory endnotes **should be provided in the "One-time/Submission Year" column if they only pertain to the FY 2025 submission. Comments that will apply in out-year submissions should be provided in the "Recurring/Perennial" column. These endnotes are only required in the following cases:**
  o Actual data is not yet available or was revised from a prior year actual.
  o "Actual" data is an estimate rather than final.
  o Actual data was not collected for a specific year or is collected in alternate years.
  o Definition or calculation method for a measure changed.
  o Reporting period for data changed (for example, from state to federal fiscal year).
  o Technical or unusual term is used (for example, "walk-off").

  Endnotes should be concise - lengthy performance explanations should be included in the performance discussion column instead.

- Revisions after submission**:** Agencies expecting changes to data or that have measures for which data are not available by the MFR due date, must include an explanation in the transmittal e-mail when submitting the initial files including: (a) which data will change and (b) when the final data will be available. When agencies submit the final files, the subject of the transmittal e-mail should include the language "**Final files including all data**'' and the e-mail message should state what has been revised, with files that have changes highlighted.

- <u>Proofreading:</u> Agencies must proofread the Excel template before submitting to DBM to ensure:
  - o All requested data is accurate and complete, and
  - o Endnote text is concise, grammatically correct, and free of spelling errors.