

C. MANAGING FOR RESULTS

C.1 Managing for Results Submission Requirements

Important Notes for FY 2024:

- The Managing for Results (MFR) template for FY 2024 will be distributed by July 15, 2022. This template will have prior year data (FY 2018 to FY 2021) locked for editing, to protect the integrity of what was published as “actual” data in prior years. If you have a substantial number of metrics that require “actual” data to be revised, please contact your OBA analyst to determine the most efficient way to get that information into the locked template. The data entry columns for performance discussion, endnotes, and data definitions should NOT be locked – please contact your OBA analyst if they are, so DBM can unlock them for editing.
- All agencies will submit the MFR on one combined due date of **September 2, 2022**. This is NOT the same as the due date for your budget request, which is different for each agency.
- DBM asked agencies to submit MFR template changes by June 3, 2022. 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.
- 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 the following two electronic files - Section C.2 and Section C.3 provide more guidance for each component. Note that 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 July 15, 2022. Each agency must use this revised electronic file to create the FY 2024 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 2, 2022**. 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:

ET = Excel template (*now includes Performance Discussion and Definition and Controls*)

C = Certification statement

Examples of file names:

H00 ET 24

H00 C 24

Excel Template: Please reach out to your DBM budget analyst or Jennifer Spangler (jennifer.spangler@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 3 will be considered on a case-by-case basis.
- Explanatory endnotes in the Excel template are **only required in the following circumstances:**
 - Actual data is not yet available or was revised from a prior year actual.
 - “Actual” data is an estimate rather than final.
 - Actual data was not collected for a specific year or is collected in alternate years.
 - Definition or calculation method for a measure changed.
 - Reporting period for data changed (for example, from state to federal fiscal year).
 - 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.
- Proofreading: Agencies must proofread the Excel template before submitting to DBM to ensure:
 - All requested data is accurate and complete, and
 - Endnote text is concise, grammatically correct, and free of spelling errors.