

Sunset Review Report

for the

Center for Public Management Department of Public Administration

January 31, 2003

Approved by

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Date

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Date

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Location	Chilton Hall, 289G
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History of the Center

Established in 1992 as the professional development arm of the Department of Public Administration, the Center for Public Management (CPM) provides training and technical assistance to local governments, state agencies, and nonprofit institutions. From 1992 through 1996, the Center's activities were directed by various individuals, including Dr. Jim Glass, the current director of the Survey Research Center at UNT, and Becky Brooks Grimm, a private contractor and graduate of the public administration program. During this period, several workshops and seminars were offered to meet professional development needs of public sector managers. By 1997, CPM education activities had become focused on training for investment officers of local governments and state agencies designed to comply with Texas statutory requirements. In 1999, the training program expanded to include professional development needs of public emergency managers.

The Texas Public Funds Investment Act (Chapter 2256, Government Code) requires that designated investment officers of all entities affected by the Act receive on-going training in public funds management. The Act specifies that the training be received from an "independent source" approved by the entity's governing body. Any organization offering the training must report the names of the entities it has trained to the Texas State Comptroller's Office annually. Several thousand individuals are subject to this requirement, including those who manage UNT funds. Originally offered in 1996, the CPM investment training program was formalized in 1997 under the direction of DeeAnn Cheatham, who later became Associate Director of the Center. Since 1997, the program has been offered in various locations throughout Texas in the form of one or two-day workshops. The workshops are co-sponsored by the Government Treasurers' Organization of Texas, a nonprofit association of public funds investment professionals, and, typically, by the local organization hosting the event. The investment training program is supported entirely by program revenues.

In November 1999, the position of professional development coordinator in emergency

administration was added to CPM. The coordinator is responsible for developing continuing education programs for emergency managers. The coordinator works with the Emergency Administration and Planning faculty in the Department of Public Administration and various external groups, such as the Emergency Management Association of Texas, to identify training needs and opportunities. Seminars are sponsored for both professionals and students. This position is supported by state appropriation. Grant funds have also been used for specific projects and events.

In addition to continuing education, CPM provides services on a contractual basis to several public sector organizations. CPM is the administrative services provider for the Government Treasurers' Organization of Texas (GTOT), an association of public sector investment professionals. Among the services provided to GTOT are the publication of a quarterly newsletter, maintenance of membership and financial records, maintenance of the group's website, and coordination of all seminars and conferences. CPM provides website maintenance services under a contract with the Urban Management Assistants of North Texas (UMANT), an association of public sector management professionals. CPM staff also administers a professional certification program for emergency managers on behalf of the Emergency Management Association of Texas. Contract revenues support these activities.

Goals and Objectives of the Center for Public Management

The Center's mission is to promote excellence and efficiency in public and nonprofit organizations through training and technical assistance. To this end, four goals have guided the Center since its inception:

1. Establish and maintain relationships with agencies in local, state, and federal government that would benefit from CPM's technical and training assistance;
2. Establish and maintain cooperative relationships with professional associations that serve managers in public and nonprofit organizations;
3. Establish and maintain cooperative relationships with other UNT centers and institutes that share an interest in serving public and nonprofit organizations; and
4. Provide research and training opportunities to UNT faculty and graduate students.

Major Activities and Significant Accomplishments of the Center

Listed below are the programs or projects sponsored by CPM during each of the past five years. The investment training program is managed by CPM and taught either by CPM staff or by individuals with investment expertise overseen by CPM. The emergency management training program has involved faculty members and students enrolled in the

Emergency Administration and Planning Program (EADP), including Assistant Professors David McEntire and Robie Robinson. Contractual services are provided by CPM staff, frequently utilizing UNT resources such as Printing Services and Union Design Works.

1998 – 2002

Public Funds Investment Act Training (Goals #1 – 3)

The Texas Public Funds Investment Act requires all designated investment officers and certain other positions to attend investment training every two years. For local governments, the requirement is ten hours every two years. For state agencies and institutions of higher education, there is no hourly requirement. All entities must receive training from an independent source approved by the governing body. The CPM investment training program is designed to comply with the Act and is offered throughout Texas. Attendance certificates are provided to each attendee, and attendance records are maintained at CPM. Since 2000, CPM has reported the names of the entities trained to the Texas State Comptroller's Office by December 31st of each year as required by the Act.

Training on behalf of the Texas Higher Education Coordinating Board

Since 1997, the Public Funds Investment Act has designated the Texas Higher Education Coordinating Board as the agency responsible for providing training to the investment officers and governing boards of all state agencies and institutions of higher education as to their responsibilities under the Act. A written agreement between UNT and the Coordinating Board delegates to CPM the responsibility to provide training on behalf of the Coordinating Board. The agreement requires CPM to offer two workshops each year specifically for the investment officers of entities affected by these requirements, one of which must be located in Austin. Training for governing board members is accomplished by purchasing and viewing a 30-minute video produced by the UNT Center for Media Production. All members of state governing boards, including the regents at all state universities and community colleges, are required to view the video within six months of their appointment to the board.

2002 Investment Training Activities

During 2002, CPM conducted 21 workshops, attracting attendance of 854 individuals. Workshop locations included Abilene, Amarillo, Arlington, Austin, Corpus Christi, El Paso, Lufkin, Odessa, Rosenberg, San Angelo, San Antonio, and Waco. Multiple workshops were offered during the year in some locations, such as Arlington and San Antonio. All workshops were co-sponsored by the Government Treasurers' Organization of Texas. Additional co-sponsors included host organizations such as the North Central Texas Council of Governments in Arlington, Region 15 Education Service Center in San Angelo, and McLennan Community

College in Waco. Also included in the number of workshops offered in 2002 was on-site investment training provided by CPM at several conferences sponsored by such organizations as the Government Finance Officers Association of Texas, the Texas Association of Community College Business Officers, and the Texas Water Conservation Association.

2001 Investment Training Activities

During 2001, CPM conducted 18 workshops, attracting attendance of 860 individuals. Workshop locations included Amarillo, Arlington, Austin, Beaumont, Commerce, Lubbock, San Angelo, San Antonio, Victoria, Waco, and Wichita Falls. Multiple workshops were offered during the year in some locations, such as Arlington and San Antonio. All workshops were co-sponsored by the Government Treasurers' Organization of Texas. Additional co-sponsors included host organizations such as the Alamo Area Council of Governments in San Antonio, the City of Beaumont, and Texas A & M – Commerce. Also included in the number of workshops offered in 2001 was on-site investment training provided by CPM at conferences sponsored by the Government Finance Officers Association of Texas and the Texas Association of Community College Business Officers.

2000 Investment Training Activities

During 2000, CPM conducted 23 workshops, attracting attendance of 1,050 individuals. Workshop locations included Abilene, Amarillo, Arlington, Austin, Corpus Christi, Denton, El Paso, Galveston, Houston, McAllen, Odessa, San Angelo, San Antonio, Tyler, Victoria, and Waco. Multiple workshops were offered during the year in some locations, such as Arlington, Austin, and San Antonio. All workshops were co-sponsored by the Government Treasurers' Organization of Texas. Additional co-sponsors included host organizations such as the City of Abilene, the Panhandle Regional Planning Commission in Amarillo, and Ysleta ISD in El Paso. Also included in the number of workshops offered in 2000 was on-site investment training provided by CPM at conferences sponsored by the Government Finance Officers Association of Texas and the Texas Water Conservation Association.

1999 Investment Training Activities

During 1999, CPM conducted 21 workshops, attracting attendance of 942 individuals. Workshop locations included Abilene, Amarillo, Arlington, Austin, Houston, Lubbock, San Angelo, San Antonio, Sherman, Texarkana, Tyler, Victoria, and Waco. Multiple workshops were offered during the year in some locations such as Arlington, Austin, and Houston. All workshops were co-sponsored by the Government Treasurers' Organization of Texas. Additional co-sponsors included host organizations such as Nortex Regional Planning Commission and Odessa

College. Also included in the number of workshops offered in 1999 was on-site investment training provided by CPM at conferences sponsored by the Government Finance Officers Association of Texas and the Texas Water Conservation Association.

1998 Investment Training Activities

During 1998, CPM conducted 16 workshops, attracting attendance of 852 individuals. Workshop locations included Abilene, Amarillo, Arlington, Austin, El Paso, Fort Worth, Groves, Kerrville, Odessa, San Antonio, Victoria, and Weslaco. Multiple workshops were offered during the year in some locations such as Arlington and El Paso. All workshops were co-sponsored by the Government Treasurers' Organization of Texas. Additional co-sponsors included host organizations such as the West Central Texas Council of Governments and the City of Groves. Also included in the number of workshops offered in 1998 was on-site investment training provided by CPM at conferences sponsored by the Government Finance Officers Association of Texas and the Texas Water Conservation Association.

2000 – 2002

Emergency Managers' Training (Goals #1 – 4)

Since the addition of the professional development coordinator to CPM in November 1999, training opportunities have been provided both to professionals and to students in the Emergency Administration and Planning Program. One of the coordinator's responsibilities is to plan and coordinate Disaster Education Day, an annual event hosted by CPM and EADP. This event has grown each year in attendance, attracting 256 people over the past three years.

In November 2000, CPM sponsored training for emergency managers in the state pertaining to Warning and Recovery for disasters. 33 emergency management professionals and several students attended the event. This conference brought \$2,700 into CPM through sponsorship and attendance fees.

In the summer of 2001, CPM was contracted by the Federal Emergency Management Agency to provide training for first responders (police, fire, emergency medical, and the like) in terrorism for Ardmore Oklahoma and Fayetteville, Arkansas. This grant was for just over \$22,000. 54 local and state officials attended the Oklahoma event. In Arkansas, 76 persons attended the training.

Contracts for Services (Goal #2)

In 2000, CPM became the administrative services provider for the Government Treasurers' Organization of Texas (GTOT), a non-profit association of over 300 public sector investment professionals. GTOT's active membership includes

treasurers and finance officers from cities, counties, school districts, special districts, state agencies, and institutions of higher education across Texas. Professionals from the private sector who offer investments to public entities may also join GTOT.

The organization's current membership includes representatives from the largest banks (Bank of America, Bank One, JPMorgan Chase, Wells Fargo) and brokerage houses (Merrill Lynch, Lehman Brothers, PaineWebber) in the state. CPM maintained all membership and financial records of the organization, published its quarterly newsletter, coordinated all seminars and conferences, and maintained the group's website during this period. The contract is renewable annually, expiring December 31st of each year. The initial contract required payments from GTOT of \$8,000 quarterly.

CPM staff administered a professional certification program for emergency managers on behalf of the Emergency Management Association of Texas, an association of over 300 public sector emergency management professionals. The Texas Certified Emergency Manager program is intended to promote an increased level of professionalism in the emergency management field in Texas. Under this contract, CPM receives \$600 annually plus \$25 per certificate awarded.

CPM maintained the website for the Urban Management Assistants of North Texas (UMANT). UMANT is an organization of over 200 public administration professionals. Under this contract, CPM bills website maintenance activities quarterly.

Assessment

During the first five years of its existence, CPM generated almost \$100,000 in external funding, mostly through fees for training programs, grants for technical services to professional associations in Texas, and one gift. Passage of the training requirement in the Public Funds Investment Act of 1995 opened a unique opportunity for CPM to channel its expertise. In 1996, it was decided to test the market potential by contracting with Becky Brooks Grimm to develop and conduct six workshops around the state. Based on the success of that pilot effort and the successful negotiation of an agreement with GTOT in 1997, a commitment was made to recruit a full-time investment training coordinator.

Revenues from the investment training program exceeded \$100,000 for four of the last five years from 1999 through 2002. CPM is the recognized leader in providing this training and is the program of choice for many public sector non-profit organizations in the state, including the Government Treasurers' Organization of Texas, the Government Finance Officers Association of Texas, the Texas Association of Community College Business Officials, and the Texas Water Conservation Association. Success is also demonstrated by the on-going agreement to provide training on behalf of the Texas Higher Education Coordinating Board to state agencies and institutions of higher education. The investment training program has eclipsed other aspects of CPM training for public managers occurring during its first five years. Attendance at investment training workshops has exceeded 4,000 during the last five years.

Training for emergency managers is a new program for CPM established during the last five years. A variety of methods has been used to meet the continuing education needs of professionals in this field, including implementing a certification program for the Emergency Management Association of Texas, establishing Disaster Education Day as a premier event for professionals and students, and exploring joint training opportunities with agencies and organizations in the public and private sector, including the City of Denton, the North Central Texas Council of Governments, Association of Contingency Planners, the Disaster Recovery Institute, the International Association of Emergency Managers, and the Texas Division of Emergency Management. Grant funds have financed specific projects for the Federal Emergency Management Administration. Participation of EADP faculty and students in all of these projects has been critical.

The services contracts with various public sector organizations are providing an additional source of ongoing revenue for CPM. While the success of the investment training program has enabled CPM to become financially stable, diversification of revenue sources is desirable to reduce reliance on a single program.

Retaining CPM is essential to the public service mission of the Department of Public Administration. CPM was envisioned as a resource for public managers in Texas - a Center that would provide objective, cost-effective services that are timely and reflect the highest standards of quality. From a faculty perspective, CPM is a mechanism for channeling technical assistance projects such as training for investment officers and emergency managers.

Proposed Plans

The next five years will prove to be a critical time in the development of CPM. The goal is to strengthen CPM financially while continuing to diversify its revenue sources within staffing limitations. Pursuit of the following objectives will aid in accomplishing this goal.

- Maximize revenue from the investment training program. While the long-term goal is to reduce reliance on this program, it will be CPM's mainstay in the interim. Revenue can be maximized from a combination of periodically evaluating registration fees (a small increase was instituted January 1, 2003) and controlling workshop expenses. Although the position of investment training coordinator remains unfilled, the need for additional trainers has been met through retaining private sector expertise.
- Maintain the quality of the investment training program, including eligibility to provide continuing education credit. The success of the program comes in part from incorporating regulatory and industry changes in the field as they occur. New sessions are also added to improve and expand attendees' knowledge. CPM is registered with the Texas State Board of Public Accountancy as a provider of continuing education credit. Other organizations such as the Texas Association of Counties and the Texas

Association of School Business Officials have approved the program as a source of continuing education credit for their members.

- Maintain Agreement to provide training on behalf of the Texas Higher Education Coordinating Board. Although mandated by law to provide the investment training to state officials, the Coordinating Board does not have on staff the expertise needed to provide it. They have turned to CPM for that expertise and have been pleased with the quality of the services. CPM will continue co-hosting workshops with the Coordinating Board and providing video training for agency board members that fulfill the statutory requirements.
- Develop and maintain external revenue sources for the emergency management training program. While continuing to seek funding for individual projects, ongoing revenue sources should be secured. Such revenue sources include establishing annual conferences and events. CPM is planning a conference for summer 2003, which will be the first in a series of annual conferences for emergency managers from the public and private sectors. The conference will be co-sponsored by the North Central Texas Council of Governments, the Emergency Management Association of Texas, the Association of Contingency Planners, the Disaster Recovery Institute, and the International Association of Emergency Managers. Other sources of ongoing revenue may be obtained by expanding contractual services to non-profit organizations such as EMAT and developing training materials and programs for the Texas Division of Emergency Management. In addition, grants will continue to be sought to provide training for first responders, including working with other UNT divisions to garner funds.
- Maintain contractual services to the Government Treasurers' Organization of Texas (GTOT). The GTOT contract initially provided \$8,000 quarterly to CPM for various administrative services. In December 2002, the GTOT Board approved a quarterly payment of \$9,825, beginning January 1, 2003. The Board has also tentatively approved a second increase, beginning January 1, 2004. The combined increases when formally approved will raise the total annual contract amount from the initial \$32,000 to \$46,600.

CPM's programs enhance the university's visibility throughout Texas, particularly among public administrators, strengthen its linkage to professional associations, enhance its visibility with state agencies most notably the Texas Higher Education Coordinating Board, and reinforce the reputation for excellence in the department's undergraduate program in emergency administration and graduate Master of Public Administration program.

The programs and services offered by CPM directly support UNT's mission to assume a primary leadership role in addressing community needs of the region and the state. CPM contributes to UNT's effort to cultivate partnerships with educational institutions at all levels, government agencies, businesses, and nonprofit organizations to improve the quality of education and serve as a source for lifelong learning and professional education.

