



# InsideNGO Annual Member Meeting - Monday, June 6, 2011

	Finance / Grants / Contracts	Professional/Org. Development	HR:Strategic	HR:Specialized	HR:Operational				
8:00-9:00	<b>Registration</b>								
9:00-9:30	<b>InsideNGO Welcome &amp; Opening Remarks (Room 202AB)</b>								
9:30-10:30	<b>Keynote: Dan Pallotta (Room 202AB)</b>								
10:30-10:50	<b>Break</b>								
10:50-12:05	<b>Room 209C</b>	<b>Room 207B</b>	<b>Room 207A</b>	<b>Room 204A</b>	<b>Room 204B</b>	<b>Room 204C</b>	<b>Room 203AB</b>	<b>Room 201</b>	
<b>Session 1</b>	Dan Pallotta Unplugged	Subawards: Preaward Assessment and Monitoring	USAID Grants & Contracts 101: Comparing and Contrasting Assistance and Acquisition	Building Interpersonal Negotiation Skills	Motivation Beyond Money - Engaging Your Staff	Benchmark: Are You at Risk, Compliant or Above & Beyond When It Comes to Duty of Care?	Compensation 101: Understanding the Basics	Hiring Workers When You are Not Registered In a Country - The Options & Risks	
	Dan Pallotta	Bregeita Jefferson; Carol Ann Smith	Deborah Hanley; Steve Kroll	Bob Jud	Mechelle Evans; Beth Gragg; Ann Wickham	Lisbeth Claus	Michele Zeller	Don Dowling; Terry Sheridan	
	<b>Room 209AB</b>		<b>Room 206</b>	<b>Room 208AB</b>					
	Internal Audits: Farm it out, Staff it Internally, or a Combination of Both?		Proposal Management	Six Tools for Better Project Management and Higher Impact					
	Carol Davis; Bob Green; Jim Larson		Bea Bezmalinovic Dhebar; Byron Radcliffe	Eric Berg					
12:05-1:30	<b>Lunch and Time to Visit Exhibitors</b> See Page 7 in your Program for additional lunch information								
1:30-2:30	<b>Room 207B</b>	<b>Room 209AB</b>	<b>Room 206</b>	<b>Room 201</b>	<b>Room 202AB</b>	<b>Room 202AB</b>	<b>Room 203AB</b>	<b>Room 204C</b>	
<b>Session 2</b>	Audit Findings: Anatomy, Diagnosis and Treatment	U.S. Department of State Policy Update	GUCS, FOGS, and Other Special Subaward Types	1:1 Conversations for Managers	A Great Work Place - Lessons from the Best		The Global Personnel Chess Board: Moving Key People Across Borders - Legal Issues in Immigration	Demystifying Proposal Development - HR's Key Role	
	Bob Lloyd	Katrina Fotovat; Georgja K. Hubert	Roshana Cohen; Tammy Forrester	Barbara Grant	Michael Burchell		Don Mooers	Bea Bezmalinovic Dhebar	
2:30-2:45	<b>Break</b>								
2:45-4:00	<b>Room 207B</b>	<b>Room 207A</b>	<b>Room 206</b>	<b>Room 202AB</b>	<b>Room 203AB</b>	<b>Room 204AB</b>	<b>Room 201</b>	<b>Room 204C</b>	
<b>Session 3</b>	Dealing with Multiple Donors	Creating and Embracing a Culture of Compliance	Negotiating with USAID: Best Practices and Practical Advice	Transformations: Moving from Technical Expert to Manager Maven	Work/Life Balance - Is it Possible?	Organizational Conflict: HR's Role in Overcoming Barriers Between Departments and Teams	Behavioral Interviewing - Tool to Selecting the Right Candidates	Magic, Marketing, & Methodology - Talent Scouting Strategies	
	Sheila Mitchell; Eric Walker	George Gates; Byron Radcliffe	Mary Markowicz; Lee Zahnow	Julia L. Ritchie	Steve Bylow; Brenda Smith	Gururaj Kumar; Dawn Martin	Kimberly Hirsh	Laura Retzler; Connie Robson	
	<b>Room 209AB</b>								
	International Insurance Low-Down								
	Danusia Dzierzbinski; John Mina; Scott Newman								
4:00-4:15	<b>Break</b>								
4:15-5:30	<b>Room 209AB</b>	<b>Room 207A</b>	<b>Room 206</b>	<b>Room 209C</b>		<b>Room 204AB</b>	<b>Room 201</b>	<b>Room 203AB</b>	
<b>Session 4</b>	Moving Funds When Your Options are Limited	FFATA in the International Context: Are You Ready? Have You Started?	Cost Share: How to Budget, Document and Value	Facilitation Skills for Remote Meetings		Breakout: Staff Care EAPs for the Global Worker - Building Resiliency	Breakout: Performance Management & Your Organization's Culture	Breakout: HR Field Audits & Assessments	
	Sassan Parandeh	Don Allen; Kimberly Dixon; Bob Lloyd; Jhon Manning; Helen Rottmund	Alison Brady; Mike Lavelline; Nikolos Oakley	Barbara Grant		Moderator: Rick Augsburger	Moderator: Chrissie Shea	Moderator: Paulina Sanchez	
	<b>Room 207B</b>				<b>Room 208AB</b>		<b>Room 204C</b>	<b>Room 202AB</b>	
	Financial Reporting and Dashboards: Communicating Financial Information to Non-Financial Types				Presenting Your Ideas to Senior Leadership	Breakout: Global Recruitment Toolbox	Breakout: Internal Communications - HR's Role		
	Marlow Kee; Sharon Pollack				Ryan Winger	Moderator: Lars Volz	Moderator: Marcia Herrera		
5:30-7:00	<b>Reception and Time to Visit Exhibitors (Ballroom A)</b>								



InsideNGO Annual Member Meeting - Tuesday, June 7, 2011

	Finance / Grants / Contracts			Professional/Org. Development		HR:Strategic	HR:Specialized	HR:Operational	IT:Technical	IT:Business
8:00-9:00	Morning Breakouts			Morning Breakouts						
	<ul style="list-style-type: none"> <li>· CFOs (Room 207A)</li> <li>· Finance Directors &amp; Controllers (Room 206)</li> <li>· Audit and Internal Auditors (Room 209AB)</li> <li>· Grants/Contracts Directors (Room 207B)</li> </ul>			HR Special Interest Groups (Room 202A): <ul style="list-style-type: none"> <li>· Recruitment</li> <li>· Compensation &amp; Benefits</li> <li>· Staff Development</li> <li>· New to International HR</li> <li>· Working in War Zones</li> </ul>						
8:00-9:00	Registration and Time to Visit Exhibitors									
9:15-10:45	Room 206	Ballroom B (3rd Floor)		Room 203AB	Room 202B	Room 202B	Room 202A	Room 201	Room 204B	Room 204C
Session 1	Impact Investing - An Emerging Opportunity	USAID Update: Maureen Shauket, Director of Acquisition and Assistance at USAID		The Art of Effective Goal Setting	Ready, Set, Go: A Framework for Delivering Capacity Building		Advanced Local Compensation Roundtable	Performance Management - Throw Out the Ratings!	Building the Global Infrastructure Backbone for Your Org	Techniques for Mobile Data Collection in the Field
	Tom Dente; Sue Dorsey; Art Stevens; Laura Tomasko	Maureen Shauket		Shari Cohen	Peter York		Warren Heaps; Robert Reynolds; Pamela Weinacht	Marsha Moulton; William Sparks	David Goodman	Stan Mierzwa
				Room 208AB						
				Demystifying Airfares to Get the Most from Your Travel Dollars						
				Steve Summers						
10:45-11:00	Break									
11:00-12:15	Room 209AB	Room 207B	Room 207A	Room 202B	Room 202A	Room 203AB	Room 201	Room 204A	Room 204B	Room 204C
Session 2	Trends in Enterprise Risk Management	Teaming Agreements: Setting the Framework for a Productive Project Partnership	Federal Contracts Update	The Art of Delegating	Building Leadership Potential Through Coaching	Putting Organizational Competencies to Work	Defining the Emerging Global Workforce - Setting a New Strategic Direction	Recruitment and Compliance Issues for Contract Recruiting	Real World Benefits for Cloud Computing: A Detailed Case Study	Social Tools for Social Change
	Tom Dente; Gareth Elliot; Sampriti Ganguli	Alan Ring	Alan Chvotkin; Kevin Wiedmann	Barbara Grant	Matthew Tye	Stephen Moles	Gayle Campbell; Susan DeThomasis; Tom Huban; Reggie McRae	Darlene Andrews; Dawn Johnson; Steve Kroll	Scott Mills	Adriel Hampton; Nicholas Martin
	Room 209C			Room 206						
	Investment Policies and Reserves	When the IG Calls, are You Ready?								
	Bill Jarvis; Mike Meenan; Glenn Ross	Beverly Armstrong; Samantha Barbee; Ken Repp; Samir Youssef								
12:15-1:45	Lunch (Ballroom A & B) and Time to Visit Exhibitors See Page 16 in your Program for additional lunch information									
1:45-3:00	Room 207B	Room 206	Room 207A	Room 202B	Room 209AB	Room 203AB	Room 201	Room 202A	Room 204B	Room 204C
Session 3	Charity Navigator: Financial Measures and Beyond	Collaborate, Communicate, Comply to Minimize Risk	Contract Types and Their Implications	Effectively Engaging in Difficult Conversations	Proactive Leadership in Challenging Times	Managing Change: The Human Element	Background and Reference Checks - Legal & Other Issues	Crisis Management - How Prepared Are You?	Migrating MS Mail to the Cloud: Case Studies of BPOS/Live365	Bleeding Edge Applied Social Media
	Ken Berger	Keith Edwards; Anthony Koomson; Steve Kroll	Sajeev Malaveetil; Mark Roberts	Deborah Howard	Barbara Grant	Earl Moran; Christina Way	Betty Graumlich; Jeannie Schultz	Mike Blyth	Theron Kelso; John Talieri	Christopher Maddocks; Jack Swayze
	Room 209C			Room 208AB						
	Compliance Training for Field Staff			Productivity Tools to Help You Professionally and Personally						
	Doug Horner; Virginia McMullan; Nancy Otterstrom			Surya Ganguly; Bill Lester						
3:00-3:15	Break									
3:15-4:30	Room 209AB	Room 209C	Room 206	Room 202A	Room 202B	Room 202B	Room 204A	Room 201	Room 204B	Room 204C
Session 4	FASB Update with Jeff Mechanick	Procurement Shop Models	Subrecipient or Vendor? Sorting Out the Subaward Scene for USG Awards	Creating Connections and Improving Team Dynamics	Managing Your Leadership Brand		Demonstrating Value - Training Assessment & Impact	HR Systems - What's Popular, What's Not, And Why	Diving Into Virtualization	Mobile Technology/ Tools for NonProfits
	Jeff Mechanick	Jaime Acosta; Harley Black; David Guier	Bob Lloyd	Deborah Howard	Shari Cohen		Adrianna Noll; Marie-Laure Curie	World Café format	Geoff Froh; Richard Machanoff	Bill Lester
	Room 207B			Room 207A						
	The Income Allocation Maze	Fraud Around the Globe								
	Ellen J. Harrison; Renee Richardson	Sampriti Ganguli; George Gates								
4:30-5:00	Closing Session and Prizes (Ballroom B)									



InsideNGO Annual Member Meeting - Wednesday, June 8, 2011

	Cross-Ops Legal	Cross-Ops General	Cross-Ops General	Cross-Ops IT
8:00-9:00	Registration and Time to Visit Exhibitors			
9:00-9:30	InsideNGO Welcome & Opening Remarks (Ballroom B)			
9:30-10:30	Keynote: Alan Gregerman (Ballroom B)			
10:30-10:45	Break - Get your complimentary book signed by Alan Gregerman			
10:45-12:00	Room 207B	Room 207A	Room 206	Room 209AB
Session 1	<b>The Social Media Explosion &amp; Its Legal Impact on the Workplace</b>	<b>Global Operational Risk Management - Strategies for Mitigation</b>	<b>The Decision Driven Organization - A Key to Successful Change Initiatives</b>	<b>Understanding the Value of GIS and ITIL for Your Organization</b>
	Neil McKittrick; Leslie White	Joe Gleason; Vandana Gupta; Doug Horner; Joan Keston; Dan Reilly	David Cooper	Kurt Eckerstrom; Nicholas Evans
12:00-1:25	Lunch (Ballroom A & B) and Time to Visit Exhibitors See Page 21 in your Program for additional lunch information			
1:25-1:50	Awards and Prizes (Ballroom B)			
2:00-3:15	Room 207B	Room 207A	Room 206	Room 209AB
Session 2	<b>Navigating Export Controls &amp; OFAC: Traps to Avoid &amp; Guidance for Compliance</b>	<b>HQ &amp; Field: Insights &amp; Strategies for Creating Effective Senior Team Relationships</b>	<b>Creating a Culture of Ethics</b>	<b>How to Develop an IT Strategy in the Cloud: Building a Business Case</b>
	Christine Filosa; Carolyn Klamp; Roland Shrull	Daniel Doucette; Jason Phillips; Mannasseh Phiri; Paulina Sanchez	Chris Buchholtz; Warren Fairfax; Mary Reiss	Theron Kelso; Scott Mills; John Talieri
3:15-3:30	Break			
3:30-4:45	Room 207B	Room 207A	Room 206	Room 209AB
Session 3	<b>New Office Registrations: Options &amp; Considerations</b>	<b>The Strategic Rise of KM</b>	<b>Capacity Building - Models for Success</b>	<b>Planning Infrastructure for Your Field Offices - What Does it Take?</b>
	Stephanie Calves; Chris Rader; John S. Russell	Luz Marina Alvare; Paul Moniz; Rebekah Usatin; Scott Yetter	Shelly Kessler; Susan Misra; Olga Yakimakho	David Goodman; Jason Phillips

# 2011 InsideNGO Annual Meeting

## Monday, June 6, 2011

Monday

**8:00 – 9:00 Registration**

**9:00 – 9:30 InsideNGO Welcome and Opening Remarks** (Room 202AB)

**9:30 – 10:30**

**Room 202AB – Keynote Address**

**Dan Pallotta**

Dan is the distinguished author of *Uncharitable: How Restraints on Nonprofits Undermine Their Potential*. He is a regular contributor to the *Harvard Business Review* online where he writes about transforming the traditional nonprofit paradigm. Dan has been featured extensively in the media and spoken at several leading educational institutions, foundations and nonprofit forums on the opportunity for nonprofit transformation. In his work, he has focused on how to challenge and change traditional constraints and practices to gain more significant, innovative and sustaining results.

*Dan Pallotta, Author*

**10:30 – 10:50 Break**

**10:50 – 12:05**

**Room 209C – Finance / Grants / Contracts**

**Dan Pallotta Unplugged**

Join keynote presenter, Dan Pallotta, for an informal discussion following his keynote address. Discuss how the sector can help break the *Uncharitable* mindset.

*Dan Pallotta, Author*

**10:50 – 12:05**

**Room 209AB – Finance / Grants / Contracts**

**Internal Audits: Farm it out, Staff it Internally, or a Combination of Both?**

Come learn about various models for handling the internal audit function. Explore the ways that small, medium and large NGOs can cover the internal audit/compliance function.

*Carol Davis, PCI; Bob Green, FHI; Jim Larson, Gelman, Rosenberg and Freedman*

**10:50 – 12:05**

**Room 207B – Finance / Grants / Contracts**

**Subawards: Preaward Assessment and Monitoring**

How do you conduct due diligence on NGOs you plan to make a subaward to? How do those assessment findings affect how you work with, provide training to, and monitor the subawardee? This session will showcase the process InsideNGO member PATH has evolved for pre-award and risk assessment and also discuss different ways to monitor subawardees depending on the type of subaward issued.

*Bregeita Jefferson, PATH; Carol Ann Smith, Population Services International*

**10:50 – 12:05**

**Room 206 – Finance / Grants / Contracts**

**Proposal Management**

Have you asked yourself, why is it that other organizations are aware of solicitations before you are? Why do our proposals take such monumental effort while others seem to respond more quickly, easily, and to more solicitations? With NGOs increasingly competing for contracts and cooperative agreements, and competition overall getting tougher, this session will address some of the best practices in managing the competitive process.

*Bea Bezmalinovic Dhebar, Momenteum Group; Byron Radcliffe, Management Systems International*

**10:50 – 12:05**

**Room 207A – Finance / Grants / Contracts**

**USAID Grants & Contracts 101: Comparing and Contrasting Assistance and Acquisition**

Confused about the differences between these two USAID mechanisms? Join colleagues in this introductory session that highlights the primary differences between assistance (grants, cooperative agreements) and acquisition (contracts). What source documents govern? What practical distinctions do you need to be aware of if you manage both?

*Deborah Hanley, ACDI/VOCA; Steve Kroll, Kroll Consulting*

10:50 – 12:05

Room 204A – Professional/Org. Development

**Building Interpersonal Negotiation Skills**

The ability to negotiate differences between colleagues, bosses, subordinates, agencies and partners is an important skill. This session will provide an explanation of the two major forms of Negotiation: Position-Based and Interest-Based. Gain tools and techniques that you can apply right away.

*Bob Jud, Robert A. Jud Consultants*

10:50 – 12:05

Room 208AB – Professional/Org. Development

**Six Tools for Better Project Management and Higher Impact**

This session will be a rapid overview of 6 project management tools and how they lead to better performance. Tools will include: Project Initiation Tools, Work Breakdown Structures which disaggregates all tasks from start to finish – allowing for planning, sequencing and monitoring activities, Network Diagrams and Critical Path tools that help managers track critical activities that directly impact delays in project completion, Risk Register and Issues Logs that help managers prepare for the expected “unexpected” and plan contingencies appropriately, and RACI Diagrams and Communication Plans which help managers know who needs to be informed and how throughout the life of the project.

*Eric Berg, LINGOs*

10:50 – 12:05

Room 204B – Professional/Org. Development

**Motivation Beyond Money – Engaging Your Staff**

We hear it in survey results all the time- what creates a great workplace is more than a paycheck - staff want to be engaged! This session will provide 2 case studies: John Snow Inc./World Education’s Professional Development Program and PATH’s Opportunity for New Professionals. One program enables staff to develop a talent/skill and then utilize the power of peer-to-peer training to benefit others. Another program provides promising new professionals with an opportunity to visit another office/site to gain hands-on experience aligned with their professional development goals. Time will be allotted for attendees to share their employee engagement approaches. Attend this session and get ideas to bring back to your organization!

*Mechelle Evans, PATH; Beth Gragg, John Snow, Inc/World Education; Ann Wickham, John Snow, Inc/World Education*

10:50 – 12:05

Room 204C – HR: Strategic

**Benchmark: Are You at Risk, Compliant or Above & Beyond When It Comes to Duty of Care?**

Looking after your staff, volunteers, and donors while they travel or live abroad on your behalf is part of your organization’s duty of care. However, with the many recent crises some are finding too many grey areas that need to be further defined when preventative strategies and critical situations arise that really fall into an organization’s ethos or duty of care. Attendees will preview benchmarking findings that uncover what organizations all over the world are doing to respond to this issue. Attendees will leave with an understanding of where their organization currently stands and be provided some tools and strategies to address gaps that their organization may have.

*Dr. Lisbeth Claus, Atkinson Graduate School of Management of Willamette University*

10:50 – 12:05

Room 203AB – HR: Specialized

**Compensation 101 – Understanding the Basics**

What’s the difference between a band and a grade? What’s a compa ratio? What goes into creating a salary structure? This session will be an introductory session on compensation for individuals who want to learn more about this critical aspect of Total Employee Rewards. Implications in developing salary structures for local national staff and international staff will also be discussed.

*Michele Zeller, CHF International*

10:50 – 12:05

Room 201– HR: Operational

**Hiring Workers When You are Not Registered In a Country – The Options & Risks**

Hiring a global workforce is difficult particularly if you do not have a legal presence in a country. What options do you have when you need to set up a new field office for one or two employees, or a new project about to launch will end in 12 months and registration usually takes 18 months, or you have an employee that moves abroad and wants to continue to work but remotely? This session will provide some concrete guidance to the options your organization has as well as the risks.

*Don Dowling, White & Case, LLP; Terry Sheridan, The William J. Clinton Foundation; Sharon Thompson, PATH*

**12:05 – 1:30 LUNCH****Pick up your Lunch at these locations:**

HR Lunch: Outside of Room 202AB

All others: Exhibit Hall (Ballroom A, 3rd Floor)

**Lunchtime Events**

1) **New to InsideNGO?** Don't miss this opportunity to meet senior professionals in the membership, Board and Advisory Councils. Learn more about ways your membership can benefit you. Pick up your lunch outside 202AB and join us!

**Room 201: 12:15 – 1:00**

2) **Lunch & Learn: Pension Plan Options for TCNs and Local Nationals** If you have been looking for a pension vehicle for your non U.S. staff but have found the current solutions too expensive, this facilitated roundtable will be of interest to you. Recommended by a current member, Paul Beard from Alexander Beard Group will share their solution. You are encouraged to bring your questions and share your current obstacles.

**Room 203AB: 12:45 – 1:15**

3) **Lunch & Learn: Effective Meetings – 5 Easy Tips** Join Barbara Grant, a favorite presenter of InsideNGO members, as she shares tips to end unproductive meetings.

**Room 204AB: 12:45 – 1:15**

**Network**

Introduce yourself to those at your table and enhance your circle of professional contacts. Collect business cards and build your contacts. Many attendees feel this is a big plus of the Annual Meeting.

**Visit member-recommended Exhibitors for a chance to win a prize!** Ballroom A – 3<sup>rd</sup> Floor  
Everyone is encouraged to visit the Exhibitors– any time!

Get your stickers for visiting – you need 10 to be eligible to **win a prize** from InsideNGO! Leave your business card with exhibitors for even more chances to win – at the reception on Monday AND at Closing Remarks on Tuesday AND prior to the Award Ceremony on Wednesday!!

**1:30 – 2:30****Room 207B – Finance / Grants / Contracts****Audit Findings: Anatomy, Diagnosis and Treatment**

Audits conducted by independent audit firms under OMB Circular A-133, offices of inspectors general, or audit firms under contract to those offices are a fact of life in the NGO community. Unfortunately, findings that assert weaknesses in internal control and material noncompliance along with questioned costs often come with the territory. If those findings are sustained by federal awarding agencies, the consequences can harm reputation, future funding and current financial position. This session will address the subject of audit resolution from the perspective of the auditee.

*Bob Lloyd, Robert M. Lloyd Consulting Services*

**1:30 – 2:30****Room 209AB – Finance / Grants / Contracts****U.S. Department of State Policy Update**

What are the latest changes to federal assistance policy at the Department of State? What issues are they working on right now? How are they implementing FFATA and what are the new Terms and Conditions? Hear directly from Georgia Hubert, Director of Federal Assistance at State, and Katrina Fotovat, Grants Policy Analyst, on these and other important topics affecting your work.

*Katrina Fotovat, U.S. Department of State;  
Georgia K. Hubert, U.S. Department of State*

**1:30 – 2:30****Room 206 – Finance / Grants / Contracts****GUCS, FOGS, and Other Special Subaward Types**

It may look and sound like a grant, but what's a GUC (Grant Under Contract) and is it managed differently than a typical subgrant? When are they used? What is a FOG (Fixed Obligation Grant)? When might you choose to use that award format? How have the rules changed this past year? Learn from and discuss with experienced practitioners how to manage these awards, including other special award types.

*Roshana Cohen, Chemonics International; Tammy Forrester, RTI*

1:30 – 2:30

**Room 201 – Professional/Org. Development****1:1 Conversations for Managers**

Part of the job of a manager is to maximize both the productivity and the job satisfaction of those who work for them. Sometimes, these factors may be at odds with one another. Barbara Grant, an organizational consulting expert, will facilitate this session with a focus on strengthening leaders to have more productive and mutually satisfying conversations with their team members on an ongoing basis, including the challenging conversations around performance review time.

*Barbara Grant, MGS Consulting*

1:30 – 2:30

**Room 202AB – Professional/Org. Development****Room 202AB – HR: Strategic****A Great Work Place – Lessons from the Best**

While employers strive to create a great workplace where employees thrive, many organizations struggle in this area. What does it take to be GREAT? Michael Burchell from Great Places to Work® Institute, author and acclaimed speaker, has some answers for you. Based on years of experience and research, attendees will learn that it takes more than offering great pay and benefits. Michael will share practical ideas that can help you transform your organization.

*Michael Burchell, The Great Place to Work® Institute*

1:30 – 2:30

**Room 203AB – HR: Specialized****The Global Personnel Chess Board: Moving People Across Borders – Legal Issues in Immigration**

One of the most important, and most complicated, tasks undertaken by International NGOs is moving personnel from country to country, whether to or from the US, or from one foreign country to another. This session, led by Don Mooers, a recognized expert in immigration and nationality law, will provide practical guidance regarding immigration and visa issues you need to be aware of when relocating staff to the U.S. or sending employees to international sites, and the steps you need to take to insure that your staff can begin working as quickly as possible. Mooers, who worked overseas in 92 countries, brings both legal expertise and personal experience to this session. Time will be allotted for participants to ask questions.

*Don Mooers, Mooers Immigration Law*

1:30 – 2:30

**Room 204C – HR: Operational****Demystifying Proposal Development – HR's Key Role**

Pursuing competitive funding from the US Government is an activity that cuts across business functions including program, HR, finance, and contracts/grants. Yet it can be challenging to find the best way to engage functional expertise across the organization because the bidding process is fast and complex. This session will provide a primer on the proposal development process before, during, and after it is submitted with a special focus on when and how HR expertise can strengthen the proposal and improve the chances of winning new projects.

*Bea Bezmalinovic Dhebar, Momentum Group*

2:30 – 2:45 Break

2:45 – 4:00

**Room 207B – Finance / Grants / Contracts****Dealing with Multiple Donors**

How do you deal with the multiplicity and conflicting nature of regulations that funding from various donors brings? Do you have separate processes for the different donors? Impose the strictest rules on everyone? What strategies are there for Full Indirect Cost Recovery in a “cap” environment where every donor’s cap is different?

*Sheila Mitchell, FHI; Eric Walker, PATH*

2:45 – 4:00

**Room 209AB – Finance / Grants / Contracts****International Insurance Low-Down**

NGOs face risks every day, and find appropriate insurance to protect against some of them. This session will address the risks faced by nonprofits and suggest concrete strategies for addressing risk, including the vital role of insurance in prudent risk management.

*Danusia Dzierzbinski, International Rescue Committee;*

*John Mina, Willis Insurance; Scott Newman, Population Council*

2:45 – 4:00

**Room 207A – Finance / Grants / Contracts****Creating and Embracing a Culture of Compliance**

How do you build an internal compliance program (or revamp the one that you have) and then roll it out to all staff? And how do you reinforce it so it becomes a way of operating – from the top to the bottom? In this heightened atmosphere of compliance and accountability, hear what some InsideNGO members are doing and take away ideas for your own organization.

*George Gates, PCI; Byron Radcliffe, Management Systems International*

2:45 – 4:00

**Room 206 – Finance / Grants / Contracts****Negotiating with USAID: Best Practices and Practical Advice**

When negotiating the terms of an agreement, or engaging in discussions on how the implementation of a program will take place, NGOs need to know how to use the USAID regulations to support the integrity of a grant/cooperative agreement and to protect the interests of their organization, their partners, or the project itself. Come hear how two experienced grant managers are able to avoid unnecessary concessions and maintain collaborative, collegial relations with their funding partners.

*Mary Markowicz, National Democratic Institute;  
Lee Zahnow, World Wildlife Fund*

2:45 – 4:00

**Room 202AB – Professional/Org. Development****Transformations: Moving from Technical Expert to Manager Maven**

There is a considerable amount of research on what helps employees make the successful transition from technical expert to a manager of experts. This session will apply a laser like focus on the critical competencies that new managers need to succeed, and what conditions support managers to make this developmental leap successfully. Participants in this workshop will receive a set of discrete practices and tools that will help new managers adjust and thrive in their new role.

Level: New Managers, Managers that support new managers, and those that provide professional development support.

*Julia L. Ritchie, Ritchie | Tye Consulting, Inc.*

2:45 – 4:00

**Room 203AB – Professional/Org. Development****Work/Life Balance – Is it Possible?**

While in theory we know the importance of work/life balance, our mission driven focus can often hinder establishing a balance. During this session, one presenter will describe changes that led to their award winning work/life balance program. A second presenter will share their assessment process and the approaches they have instituted to address staff stress and burn out. Attendees will have the opportunity to also share programs they have successfully implemented.

*Steve Bylow, Winrock International; Brenda Smith, Root Capital*

2:45 – 4:00

**Room 204AB – HR: Strategic****Organizational Conflict: HR's Role in Overcoming Barriers Between Departments and Teams**

As an HR professional, you may find yourself helping a staff member to improve a relationship with a colleague, assisting a senior manager in diffusing tension on a team, or helping departments/projects collaborate. Led by two senior practitioners in the conflict management field, this interactive session will use case scenarios and group dialogue to highlight practical tools and approaches for strengthening your effectiveness as a mediator, facilitator and conflict manager.

*Dawn Martin, The KonTerra Group; Gururaj Kumar, The KonTerra Group*

2:45 – 4:00

**Room 201 – HR Specialized****Behavioral Interviewing – Tool to Selecting the Right Candidate**

The key to finding out how someone will perform in a job is to collect and analyze examples of how he or she has performed in similar situations in the past – an important distinction from how they report they would perform in a similar situation. This session will focus on how to conduct a behavioral interview to improve your hiring decisions. Discussion will include customizing behavioral questions for specific positions and the usage of behavioral interviews across different cultures.

Level: targeted to staffing directors or anyone driving the interview/decision process, however all staff involved in interviews are welcome to attend.

*Kimberly Hirsh, Management Sciences for Health*

2:45 – 4:00

**Room 204C – HR: Operational****Magic, Marketing, & Methodology- Talent Scouting Strategies**

Like most things in life, recruiting is part art, science, and luck. We can't change your luck but we can help you hone the art and science. This session will focus on how to identify your best prospects and how to inspire them to apply. Topics to be included: the essence of a sales pitch, best places to find people, and guidance in using Boolean search strings and advanced LinkedIn features to find great candidates.

Level: recruiters and those responsible for finding talent.

*Laura Retzler, FHI; Connie Robson, International Rescue Committee*

4:00 – 4:15 Break

4:15 – 5:30

**Room 207B – Finance / Grants / Contracts**

**Financial Reporting and Dashboards: Communicating Financial Information to Non-Financial Types**

Board members and staff that are not well versed in the world of finance need to understand what the numbers say. Explore ways to communicate financial information with graphical presentations, dashboards, and more.

*Marlow Kee, PATH; Sharon Pollack, Trickle Up*

4:15 – 5:30

**Room 209AB – Finance / Grants / Contracts**

**Moving Funds When Your Options are Limited**

How does an NGO manage its cash in areas devoid of modern banking and financial infrastructure? This session will address: 1) Selecting a banking partner for developing nations; 2) How to respond to funding needs in disaster zones (such as Haiti, Japan or Cote D'Ivoire) when the entire banking system collapses; and 3) How to use alternative or traditional methods instead of banks to move funds - funds that are critical to hiring and paying local workers and service providers.

*Sassan Parandeh, ChildFund International*

4:15 – 5:30

**Room 207A – Finance / Grants / Contracts**

**FFATA in the International Context: Are You Ready? Have You Started?**

FFATA (Federal Funding Accountability and Transparency Act) is here to stay. As of October 1, 2010, prime USG recipients receiving new federal grants/cooperative agreements of \$25,000 or higher are subject to the Act, with a continuation phase-in for contracts. Among other requirements, all sub-awardees receiving \$25,000 or more need to be reported in the Federal Subaward Reporting System (FSRS) and need a DUNS number – including indigenous NGO sub-awardees. With guidance unclear for those working overseas, organizations are scrambling to determine how best to comply. Session leaders will discuss how they are readying themselves to comply and making internal preparations, what bottlenecks they have encountered, and will share tips with fellow members. Presenters and participants alike will discuss why the act is not only difficult for small sub-awards to local NGOs, but downright dangerous.

*Don Allen, Internews; Kimberly Dixon, Winrock International; Bob Lloyd, Robert M. Lloyd Consulting Services; Jhon Manning, National Cooperative Business Association; Helen Rottmund, Catholic Relief Services*

4:15 – 5:30

**Room 206 – Finance / Grants / Contracts**

**Cost Share: How to Budget, Document and Value**

Many federal donors expect you to bring other resources to the table as a condition of their award. If you don't have cash to pledge, how do you fulfill a cost share requirement? What counts and how do you document it? How do you budget for it? Importantly, how do you value it? What is leveraging (in the world of USAID) and how does that apply? Member practitioners will share their experience and give you a glimpse of how their organizations handle cost share.

*Alison Brady, Population Services International;*

*Mike Lavelline, IREX; Nikolos Oakley, Lutheran World Relief*

4:15 – 5:30

**Room 209C – Professional/Org. Development**

**Facilitation Skills for Remote Meetings**

How often do you find yourself in a meeting with someone in a different time zone, country, or hemisphere, or working remotely with colleagues in the same building? How can you make the best use of meeting time with remote tools, in a way that allows you and your colleagues to engage in basic, day-to-day conversations as well as high-level, challenging conversations? Join Barbara Grant for an interactive session on the art of facilitating remote meetings. This session will be interactive, so come prepared to participate!

*Barbara Grant, MGS Consulting*

4:15 – 5:30

**Room 208AB – Professional/Org. Development**

**Presenting Your Ideas to Senior Leadership**

Often, the interpersonal dynamics of presenting information are more important than the data that needs to get across. This is a great session for early to mid-career professionals, or anyone wanting tips and tools for effectively presenting ideas to high-level decision makers. It will include a case study and you will walk away with a framework for examining and analyzing your target audience, advice on how to balance high-level concepts with details, and confidence in your ability to influence leaders.

*Ryan Winger, Pact*

4:15 – 5:30

### HR Breakouts

Select a topic of interest and enjoy a roundtable discussion. Take advantage of the opportunity to ask questions, share information, brainstorm and network.

#### Room 204AB - Staff Care EAPs for the Global Worker – Building Resiliency

This roundtable discussion will focus on options for supporting your global workforce when you do not have an EAP or your U.S. based EAP is not appropriate for the environment you work in.

*Moderator: Rick Augsburger, The KonTerra Group*

#### Room 201 - Performance Management & Your Organization's Culture

This facilitated open discussion will explore the challenging task of “managing up” during annual review time. Some issues to be discussed: Challenges that your organization faces in the successful completion of annual reviews. Is senior management supportive of this process through their talk/conversations and actions? What are some of the solutions that you have found to work well in minimizing lateness of completion, i.e. incentives/disciplinary actions?

*Moderator: Chrissie Shea, Elizabeth Glaser Pediatric AIDS Foundation*

#### Room 203AB - HR Field Audits & Assessments

To provide assistance to your field offices and ensure compliance with local laws and overall organizational operating philosophy, organizations often conduct periodic HR audits. This roundtable will be an opportunity to discuss how you are ensuring compliance as well as the approach you utilize in conducting both an HR audit and follow up to strengthen the country office.

*Moderator: Paulina Sanchez, Conservation International*

#### Room 204C - Global Recruitment Toolbox

Responsible for recruiting? Come join your colleagues and discuss your tips, tools, and techniques for identifying and attracting top talent.

*Moderator: Lars Volz, ACDI/VOCA*

#### Room 202AB - Internal Communications – HR's Role

Are you looking for ways to improve internal communications, enhance organizational culture, and share employee news? This roundtable offers an opportunity to discuss your internal communication tools and discuss with colleagues what they are doing. What are your successes and what are your challenges? Come and share.

*Moderator: Marcia Herrera, Management Sciences for Health*

#### 5:30 – 7:00 RECEPTION (Ballroom A – 3<sup>rd</sup> Floor)

Reconnect with colleagues and meet new ones over drinks and hors d'oeuvres. Visit Exhibitors who have products and services to help you in your work. Win a prize from InsideNGO for visiting Exhibitors today.

*Thank you to our Reception*

*co-sponsors:*

*Gelman, Rosenberg & Freedman and  
INTL Global Currencies!*

# 2011 InsideNGO Annual Meeting

## Tuesday, June 7, 2011

Tuesday

8:00 – 9:00 Visit Exhibitors – Attend an Early Morning Breakout

8:00 – 9:00

### Breakouts – Finance / Grants / Contracts

**Breakout Groups: Discuss problems, solutions and best practices with your peers.**

Talk with peers in groups that focus on your job responsibilities and your organization's needs. Hone in on those problems that are particularly bothering your organization, get tips from colleagues in similar positions at other organizations and share approaches to problems you are facing.

**CFOs (Room 207A)**

**Finance Directors and Controllers (Room 206)**

**Grants/Contracts Directors/Managers (Room 207B)**

**Audit and Internal Auditors (Room 209AB)**

8:00 – 9:00

### Breakouts – Human Resources

**HR Special Interest Groups: Unique opportunity to meet with colleagues who share a similar professional interest area. Ask questions, share resources, and network. Return to your office with new contacts to reach out to!**

**Recruitment:** open discussion on current challenges, building local recruitment capacity, and chance to meet and network with fellow recruiters. (Room 202A)

*Moderator: Gail Bryant, Catholic Relief Services*

**Compensation & Benefits:** open discussion on HQ, international and local national rewards. (Room 202A)

*Moderator: Darryl Lewis, Population Council*

**Staff Development:** in-house offerings, e-learning initiatives, global approaches, share what you are doing and hear from colleagues. (Room 202A)

*Moderator: Janet Dooley, Education Development Center*

**New to International HR:** ask your questions and discuss your challenges as new professionals to international HR. (Room 202A)

*Moderator: Vivien Rabin, Consultant*

**Working in War Zones:** discuss the issues you are facing with staff working in highly volatile locations. (Room 202A)

*Moderator: Sue Jones, Winrock International*

9:15 – 10:45

### Room 206 – Finance / Grants / Contracts

#### Impact Investing – An Emerging Opportunity

Learn about the growing field of Impact Investing where investors proactively seek investments that generate both financial as well as specific social and/or environmental returns. Understand the issues and opportunities in tapping into a larger, non philanthropic pool of capital and discuss how ongoing developments may impact the international aid and development sector.

*Tom Dente, InsideNGO; Sue Dorsey, Water for People  
Art Stevens, Calvert Foundation; Laura Tomasko, Council on Foundations*

9:15 – 10:45

### Ballroom B – Finance / Grants / Contracts

#### USAID Update: Maureen Shauket, Director of Acquisition and Assistance at USAID

Come hear what's new at USAID and what to expect for FY12. Get answers to your questions in this open exchange with Office of Acquisition and Assistance Director Shauket.

*Maureen Shauket, USAID*

9:15 – 10:45

### Room 208AB – Professional/Org. Development

#### Demystifying Airfares to Get the Most from Your Travel Dollars

Confused when you get an airfare quote and don't understand how airfares are set, the class of fare and why the same class varies widely even on the same day? Is advanced booking even the most economical? Can you avoid penalties for changing a ticket? What are humanitarian fares and can you get them? How do travel systems and policies work in concert with maximizing your travel dollars? InsideNGO Industry Partner Key Travel will give you insight, knowledge, and perspective and show you how to reduce your travel costs by 20% by adopting best practice travel management policies.

*Steve Summers, Key Travel*

9:15 – 10:45

Room 203AB – Professional/Org. Development

**The Art of Effective Goal Setting**

While goal setting is critical to both individual and organizational success, we often don't pay much attention to doing it effectively. Goals focus efforts and clarify priorities. Goals make desired outcomes clear. When done well, goal setting provides clear objectives that help guide our actions, decision making and resource allocation. Decades of research have shown that people are more fulfilled, happier and achieve more when they are working toward specific, achievable goals. In this session we'll take a step beyond the familiar "SMART" goals framework, dissect the goal setting process and look at the benefits and some common challenges to setting and meeting goals. Participants will walk away with tools you can put into action when you return to the office.

*Shari Cohen, Next Step Partners*

9:15 – 10:45

Room 202B – Professional/Org. Development

Room 202B – HR: Strategic

**Ready, Set, Go: A Framework for Delivering Capacity Building**

Why does some capacity building work, while other efforts do not? How can we know in what we should invest in order to get the "biggest bang for our capacity building buck?" Deriving from TCC's over 10 years and 60 evaluations of capacity building investments, Peter York, Senior VP and Director of Research, will share a framework for more strategically targeting your capacity building efforts; the framework is called, "Ready, Set, Go." Learn how to first assess whether you are "ready" for change; "set" for change; or need help as you "go" (i.e., during implementation). Also, learn how capacity building must be delivered, used and structured at each of these stages to get the best results possible, and most importantly, sustain those positive changes for the long haul.

*Peter York, TCC Group*

9:15 – 10:45

Room 202A – HR: Specialized

**Advanced Local Compensation Roundtable**

Who sets local compensation? Do you have a global perspective on local staff compensation or is each office viewed uniquely? This session will provide case studies on approaches organizations have taken to manage local compensation. In addition, a facilitated discussion will be hosted where participants will be asked to discuss their strategies and the pros and cons.

*Warren Heaps, Birches Group; Robert Reynolds, Conservation International; Pamela Weinacht, ChildFund International*

9:15 – 10:45

Room 201 – HR: Operational

**Performance Management – Throw Out the Ratings!**

Led by 2010's #1 rated InsideNGO HR conference presenters, this session will have you looking at performance management in both a strategic and holistic way. For individuals to be successful, their behavior and performance need to link to organizational objectives. This session will have you rethink the use of ratings and outline the approach of the forward-looking narrative, upward performance reviews, and the process for linking individual goals to organizational success.

*Marsha Moulton, ACIDI/VOCA; William Sparks, ACIDI/VOCA*

9:15 – 10:45

Room 204B – IT: Technical

**Building the Global Infrastructure Backbone for Your Organization**

You have staff in every corner of the world, but does your network reach them? Take a look at one organization's attempt to build a global IT infrastructure, from the network design and planning process to implementation. You will take away some of the pros and cons of different connectivity options, as well as new perspectives on cost and technical feasibility.

*David Goodman, International Rescue Committee*

9:15 – 10:45

Room 204C – IT: Technical/Business

**Techniques for Mobile Data Collection in the Field: Partnering with Investigative and Research Programmatic Staff on Mobile Data Collection Projects in Geographic Areas that have High Rates of Interrupted Power and Internet**

IT is moving out of the server room and into the field. InsideNGO's 2010 IT Award Winner will describe how his team has been getting more and more involved in providing technology value to programmatic research staff on data collection projects. The presentation will include a discussion on some of the different methods and tools available for mobile data collection, how to decide to build or buy solutions, and how introducing such projects into a traditional infrastructure IT group has worked out.

*Stan Mierzwa, Population Council*

10:45 – 11:00 Break

11:00 – 12:15

**Room 209AB – Finance / Grants / Contracts**

**Trends in Enterprise Risk Management**

Risk management approaches and structures continue to evolve as organizations adapt practices to best meet their needs. Scenario planning, evaluating risk interdependencies and employing flexible methodologies to gather information across businesses and regions are increasingly important elements in the enterprise view of risk. This session will provide an overview of “lessons learned” from the recent financial crisis and review sample risk management scorecards.

*Tom Dente, InsideNGO; Sampriti Ganguli, Corporate Executive Board*

11:00 – 12:15

**Room 209C – Finance / Grants / Contracts**

**Investment Policies and Reserves**

In today’s volatile investment environment, it is critical that NGOs have a well defined process in place to manage their reserves and long term funds. This session with seasoned advisors will help give you the guidance you need to navigate these dicey waters. You will take away concrete guidance to implement better reserve and investment policies.

*Bill Jarvis, Commonfund Institute; Mike Meenan, Lutheran World Relief; Glenn Ross, Archstone Portfolio Solutions*

11:00 – 12:15

**Room 206 – Finance / Grants / Contracts**

**When the IG or USAID Calls, Are You Ready?**

Unclear distinctions between the audit and investigative roles of the IG abound. It’s not usually clear at the outset if the “review” the IG or USAID is calling for is a friendly chat, a review, an investigation, or an audit. What guidance should you give the field, and what recourse do organizations have when there is uncertainty as to what rules apply? Come learn from colleagues what has worked for them in such situations.

*Beverly Armstrong, International Relief and Development; Samantha Barbee, International Youth Foundation; Ken Repp, Education Development Center; Samir Youssef, ACDI/VOCA*

11:00 – 12:15

**Room 207B – Finance / Grants / Contracts**

**Teaming Agreements: Setting the Framework for a Productive Project Partnership**

Partnering to implement a large project/program seems to be the norm these days. When you agree with an organization to partner on a proposal that may lead to an eventual project, the first step is often signing a Teaming Agreement. How are they used? What are common elements? What should you be sure they include? Are they enforceable? Hear from an experienced practitioner – and take away useful tips for the next time you are asked to sign one.

*Alan Ring, Population Council*

11:00 – 12:15

**Room 207A – Finance / Grants / Contracts**

**Federal Contracts Update**

If you take Federal contracts, you need to stay on top of the latest trends in Federal contracting including the actual or potential revisions to the FAR, AIDAR, and other regulations. This session will discuss what’s new – an important update for those responsible for the administration of Federal contracts and subcontracts.

*Alan Chvotkin, Professional Services Council; Kevin Wiedmann, Abt Associates*

11:00 – 12:15

**Room 202B – Professional/Org. Development**

**The Art of Delegating**

In the global sector, it often feels as if there is more to do than time to do it. When there is a lot to do, there is a lot that can be delegated. This session will present an accessible framework and specific strategies for successful delegation. When leaders increase their capacity to delegate well, they increase their ability to manage complexity and ensure that people are aligned and contributing to the strategic and important work of their organization.

*Barbara Grant, MGS Consulting*

11:00 – 12:15

**Room 202A – Professional/Org. Development**

**Building Leadership Potential Through Coaching**

One of the most highly rated leadership characteristics listed by employees is the “opportunity to grow and develop” under a strong leader. Truthfully, most employees learn good as well as bad behaviors from their bosses, often by observing them in action. Managers frequently miss the opportunity to turn an interaction into a learning opportunity. This workshop will focus on creating the right foundation for learning, creating the formal and informal opportunities for coaching, and developing the requisite skills to nurture and enhance leadership skills in those they manage.

*Matthew H. Tye, Ritchie | Tye Consulting, Inc.*

11:00 – 12:15

**Room 203AB – HR: Strategic**

**Putting Organizational Competencies to Work**

What is meant by “competencies?” Who participates in making them and how are they made? How can they be used systematically to support effectiveness? In this session, participants will explore together these questions and others through a series of exercises and activities. Emphasis will be placed on creating and using competencies within two important contexts -- the context of tasks that need to be performed in the workplace, and the context of the organization’s implicit and explicit values.

*Stephen Moles, Catholic Relief Services*

11:00 – 12:15

**Room 201 – HR: Specialized**

**Defining the Emerging Global Workforce – Setting a New Strategic Direction**

Defining rewards for the international workforce poses challenges to organizations. How do you categorize local staff with regional or international responsibilities? Do you have different salary scales for Expats and TCNs? Do you base rewards on nationality or position? Rather than struggling alone, we are encouraging the community to come together and develop a common language and understanding of the varied employee types. A Working Group that formed this winter will lead this highly interactive discussion. This session will provide a forum for those who have responsibilities for international compensation and benefits to join this discussion and provide your input. Don’t miss this unique opportunity to help shape the language in the sector around Employee Categories.

*Gayle Campbell, Habitat for Humanity; Susan DeThomasis, International Rescue Committee; Tom Huban, International Rescue Committee; Reggie McRae, CARE*

11:00 – 12:15

**Room 204A – HR: Operational**

**Recruitment and Compliance Issues for Contract Recruiting**

If you are new to contract recruiting or wish to hear the practices of other colleagues, this session is for you. This session will be both a primer on compliance issues and processes and challenges in recruiting staff when the funding source is a contract.

*Darlene Andrews, Chemonics International; Dawn Johnson, Management Systems International; Steve Kroll, Kroll Consulting*

11:00 – 12:15

**Room 204B – IT: Technical**

**Real World Benefits for Cloud Computing: A Detailed Case Study Migrating to Google Apps for Business – 3000 employees, 65 Countries, One Collaboration Platform**

Cloud computing is everywhere, but is it a viable solution for your organization? This session will cover how one organization developed a new IT strategy focused on enabling global organizational communications, and how they landed on their cloud solution – Google Apps. Learn how AED approached vendor evaluation, change management and communications planning, and staff transition - all in 6 months.

*Scott Mills, Academy for Educational Development*

11:00 – 12:15

**Room 204C – IT: Business**

**Social Tools for Social Change**

Social media is changing the world – don’t get left behind. Come learn how executives, program managers and communications staff can use social media to build powerful networks for social and economic change. This session will explore how social media tools are being used in developing countries, and how lightweight and low-cost Web 2.0 tools can foster engagement, reform and new models of service delivery. See an example of online training produced to educate non-governmental and civil society organizations in the application of social media tools to influence their constituencies and governments. The solutions are out there, and this practical approach to social media networking for social good will help you find them.

*Adriel Hampton, NationBuilder; Nicholas Martin, TechChange*

**12:15 – 1:45 LUNCH**

**Lunch location:**  
Ballrooms A and B – 3rd Floor

**Lunchtime Events**

1) **Safety & Security Special Interest Group – Open Invitation** If one of your responsibilities is Staff Safety & Security, join us for this special interest group meeting. Several InsideNGO members formed a Special Interest Group this year – learn about resources that have been shared and how to get involved with this group. The group will be joined by Mike Blyth from RSM Consulting who will also share security resources. Bring your lunch and your questions.

**Room 203A/B: 12:45 – 1:30**

2) **Just Ask Bob: A Quick Consult** Ask expert Bob Lloyd your specific questions about federal government requirements for award management and audit of grants and cooperative agreements.

**Room 305: 12:30 – 1:30**

3) **Young Professionals** A chance to meet and network with peers.

**Balcony of Ballroom A: 12:30 – 1:30**

**Follow Up to Early Morning Breakouts**

Enjoyed speaking with colleagues during the “Early Bird” Breakfast meetings? Make a plan to keep the conversation going and meet during lunch in the Member Lounge located in the West Overlook room on the 2<sup>nd</sup> Floor.

**Room West Overlook**

**Network**

Introduce yourself to those at your table and enhance your circle of professional contacts. Collect business cards and build your contacts. Many attendees feel this is one of the best parts of the Annual Meeting.

**Visit member-recommended Exhibitors**

**Ballroom A – 3<sup>rd</sup> Floor**

Everyone is encouraged to visit the Exhibitors in the 3rd Floor Ballroom A – any time!

Get your stickers for visiting – you need 10 to be eligible to **win a prize** from InsideNGO! Leave your business card with exhibitors for even more chances to win – at Closing Remarks on Tuesday AND prior to the Award Ceremony on Wednesday!!

**1:45 – 3:00**

**Room 207B – Finance / Grants / Contracts**

**Charity Navigator: Financial Measures and Beyond**

What is in store with the next generation of charity effectiveness rating systems? How should non-profit impact be measured beyond simple metrics of financial ratios or program outputs? What limitations exist with the current rating system? Discuss these important issues with Ken Berger, President and CEO of Charity Navigator, as they consider new measures for the non profit community.

*Ken Berger, Charity Navigator*

**1:45 – 3:00**

**Room 206 – Finance / Grants / Contracts**

**Collaborate, Communicate, Comply to Minimize Risk**

Organizations are increasingly required to demonstrate strong compliance and risk management at headquarters and in their global programs. Good reciprocal relationships and collaborative risk management efforts by headquarters and the global offices; clear, easy to use standard operating procedures; well managed staff development programs and focused program planning and execution can substantially improve organizations' compliance, reduce risks and result in stronger financial management, improved operations, better reporting and audits, timely program achievements and more positive donor attention.

*Keith Edwards, Kaepe Solutions; Anthony Koomson, Food for the Hungry; Steve Kroll, Kroll Consulting*

**1:45 – 3:00**

**Room 209C – Finance / Grants / Contracts**

**Compliance Training for Field Staff – What Methods Do You Use?**

HQ-provided training to field staff to ensure that oft-changing organizational or donor compliance policies are communicated and reinforced can take many forms. Do you bring field staff to HQ? Offer webinars or e-learning opportunities? Train regionally? Have field staff travel to other sites? Post policies or tutorials on an intranet? Hear from InsideNGO members what techniques they use, what they cover and how, and what they find to be effective methodologies to continually communicate about compliance issues with their field staff.

*Doug Horner, Elizabeth Glaser Pediatric AIDS Foundation; Virginia McMullan, Rainforest Alliance; Nancy Otterstrom, International Rescue Committee; Tammy Forrester, RTI*

1:45 – 3:00

**Room 207A – Finance / Grants / Contracts**

**Contract Types and Their Implications**

Federal agencies acquiring services, supplies or construction can choose from a variety of contract types. Selecting the most useful contract vehicle is determined through an allocation of cost and performance risks assumed by the contractor and the government, as well as the financial incentives for the contractor. The success of any procurement depends on the negotiation of the most appropriate vehicle. This session will detail the different kind of contract types available and address the practical implications of selecting each as well as examine the impact these choices have on contract execution.

*Sajeev Malaveetil, Argy; Mark Roberts, Argy*

1:45 – 3:00

**Room 202B – Professional/Org. Development**

**Effectively Engaging in Difficult Conversations**

Success in today's workplace hinges on working productively with others. Being able to clearly and effectively communicate, even during difficult conversations, is essential. This workshop is designed to provide you with tools to effectively communicate with co-workers, managers, and subordinates whether involving personal issues, performance issues, and/or conflicts.

*Deborah Howard, Guiding Change Consultants*

1:45 – 3:00

**Room 208AB – Professional/Org. Development**

**Productivity Tools to Help you Professionally and Personally**

Hi-tech tools used to be reserved for IT staff and NGOs with the largest budgets. Not anymore! Today's tools are often free, easy to use, collaborative, and enable you to work from anywhere with staff around the globe. Presenters will discuss their favorite tools, demo others, and then open up the floor for participants to share their favorites.

*Surya Ganguly, NPOKI; Bill Lester, NPOKI*

1:45 – 3:00

**Room 209AB – Professional/Org. Development**

**Proactive Leadership in Challenging Times**

In an atmosphere of diminished resources, working environments change, while working requirements don't. How do you continue to lead and work effectively when unwanted change is negatively influencing the motivation of those around you? This session is focused on understanding the predictable path of change and identifying opportunities for productive and influential leadership stances in the space of rapid and cumulative change.

*Barbara Grant, MGS Consulting*

1:45 – 3:00

**Room 203AB – HR: Strategic**

**Managing Change: The Human Element**

"Change is the norm" said Peter Drucker and from an HR perspective we know that it can be difficult. How can HR help organizations and its employees navigate change? This session will provide a brief overview of the types of change from leadership to structural to process change. Panelists will share insights and lessons learned from several change initiatives including a global transformation of an organization to combining two field project offices. Participants will be provided an opportunity to share their efforts in navigating change.

*Earl Moran, Save the Children; Christina Way, Catholic Relief Services*

1:45 – 3:00

**Room 201 – HR: Specialized**

**Background and Reference Checks – Legal and Other Issues**

What are the compliance issues that HR should be aware of when it comes to background checks and a global workforce? What can you not legally provide in terms of a reference check? This session will provide a legal perspective when it comes to "checking out" prospective hires. Tools that attendees use for background checks will also be discussed.

*Betty Graumlich, Reed Smith LLP; Jeannie Schultz, University Research Co.*

1:45 – 3:00

**Room 202A – HR: Operational**

**Crisis Management – How Prepared Are You?**

If a crisis occurs in your organization, how prepared is your HQ team to respond? Although many of your emergencies and crises will occur thousands of miles away, your HQ team needs to be prepared to address the human, financial, communications, insurance, external resource aspects. In a highly interactive session, learn key good practices in crisis management preparation.

*Mike Blyth, Risk & Strategic Management Consulting, LLC*

1:45 – 3:00

**Room 204B – IT: Technical**

**Migrating MS Mail to the Cloud: Case Studies of BPOS/Live365**

Does email migration have to be painful? Join us for a conversation with two international IT leaders who both moved their MS Mail system to Microsoft Live365. From system planning and preparation to user feedback and the metrics to measure, get the inside scoop to save yourself some headaches.

*Theron Kelso, The Nature Conservancy; John Talieri, Pact*

1:45 – 3:00

**Room 204C – IT: Technical/Business**

**Bleeding Edge Applied Social Media**

Everyone seems to know social media. Organizations are inundated with requests to use the web and social media more effectively. From boards, donors and staff, questions like “How are you monetizing your Twitter following? What’s your Facebook audience-building strategy? How can we use YouTube to diversify our media delivery channels?” are increasingly common. While the social media landscape seems constantly shifting, some foundational elements are emerging that allow organizations to set a strategy and plan. This session will outline some technologies and services that are currently being used to nurture one organization’s online community, and will explore the challenges associated with social networking in the enterprise space. We’ll also look at how Microsoft SharePoint and social networking fit together - what are the best methods to utilize SharePoint as the gateway to your public facing social networks and can SharePoint My Sites and social networking be used to increase user adoption?

*Christopher Maddocks, Children’s Hospital Trust;  
Jack Swayze, Independent Software Developer*

3:00 – 3:15 Break

3:15 – 4:30

**Room 209AB – Finance / Grants / Contracts**

**FASB Update with Jeff Mechanick**

FASB’s specialist for not-for-profit organizations will fill you in on the Federal Accounting Standards Board’s most recent guidance and what’s in the pipeline, as he walks us through a number of critical issues for our sector including: 1) the new Lease Accounting Standards as proposed by FASB, which would significantly alter reporting by developing a new model for recognition of assets and liabilities with regard to lease contracts; 2) the FASB and the IASB’s joint project on recognizing revenue; 3) Convergence with the International Financial Reporting Standards, and more. We’ll be sure to leave time for Jeff to answer any questions you have about FASB pronouncements.

*Jeff Mechanick, FASB*

3:15 – 4:30

**Room 207B – Finance / Grants / Contracts**

**The Income Allocation Maze**

When is a contribution not a contribution? What makes it an exchange transaction? What does FASB 116 say? Often it is difficult to distinguish between a contribution and an exchange transaction, as there is no clear indicator. Find your way through this maze with a roadmap charting out the different questions that need to be answered before you can know for sure.

*Ellen J. Harrison, KPMG; Renee Richardson, Population Council*

3:15 – 4:30

**Room 207A – Finance / Grants / Contracts**

**Fraud Around the Globe**

Compliance and ethics success depends on the creation of an operating environment that facilitates sound employee decision-making and compliance policy adoption. This means creating both the right cultural environment (where compliance is valued and expected) and clear, easy-to-follow processes. Learn how leading organizations must adapt risk assessments to local conditions by considering the multiple factors that impact local risks (e.g., legal, compliance, regulatory, political, social, cultural) and in so doing, mitigating fraud and misconduct. This presentation will showcase how fraud and ethical conduct vary around the globe, and how organizations are managing compliance risks more effectively.

*Sampriti Ganguli, Corporate Executive Board; George Gates, PCI*

3:15 – 4:30

**Room 209C – Finance / Grants / Contracts**

**Procurement Shop Models**

Procurement can cover commodities to personal services like consultants, and often uses sizeable amounts of project resources. How are you organized to manage this function, no matter your size or what you procure? Three InsideNGO members of different organizational sizes with varying levels and types of procurement will describe how their organization handles this function. Find out who oversees the procurement function; how they share responsibilities between HQ and the field; set thresholds for what can be procured by whom; and oversee procurement complexities in order to stay compliant with donor and organizational policies. Panelists will also discuss their recommended best practices evolved from experience, and more.

*Jaime Acosta, IFES; Harley Black, Creative Associates International; David Guier, CHF International*

3:15 – 4:30

**Room 206 – Finance / Grants / Contracts**

**Subrecipient or Vendor? Sorting Out the Subaward Scene for U.S. Government Awards**

Most NGOs refer to other entities with which they have financial relationships as “partners.” Unfortunately, that term has very little meaning in the actual lexicon of U.S. Government awards. What is meaningful is whether the “partnership” involves a subrecipient, vendor, or subcontractor and whether the NGO is a “pass-through entity” or a “lower tier organization” and the resulting requirements that flow with these relationships. This session will identify the salient features of the various types of instruments that are routinely referred to as “partnerships” in the NGO environment and will help participants improve their abilities to fashion the appropriate subaward instruments and maintain necessary accountability.

*Bob Lloyd, Robert M. Lloyd Consulting Services*

3:15 – 4:30

**Room 202A – Professional/Org. Development**

**Creating Connections and Improving Team Dynamics**

Organizational leaders are only as successful as their teams. A critical element of high performing teams is that its members communicate well and trust each other. This workshop will focus on a variety of ways that leaders can create cohesive teams.

*Deborah Howard, Guiding Change Consultants*

3:15 – 4:30

**Room 202B – Professional/Org. Development**

**Room 202B – HR: Strategic  
Managing Your Leadership Brand**

Leadership exists at every level of an organization. What can we each do to craft our image and impact as leaders? This session introduces the concept of brand as a way of helping participants focus on what they are known for as leaders and what they want to be known for. We all have an opportunity to intentionally shape our brand which is so important since it informs how we see ourselves, how others see us, and ultimately our scope of action as leaders. During the session, participants will assess what they are known for currently, and how they want that brand to develop and evolve. Participants will walk away with some actions to put in place immediately to build their leadership brand in their organization.

*Shari Cohen, Next Step Partners*

3:15 – 4:30

**Room 204A – HR: Specialized**

**Demonstrating Value – Training Assessments and Impact**

To effectively argue for training dollars, you need to demonstrate impact. How to create impact? It is through a meaningful transfer of newly acquired skills to the job. It is the **application** of these skills that brings value to our organization. The key is that the training function and management **jointly** share the responsibility for turning learning into opportunities to enhance performance and staff contributions. This session will provide examples and a tool for developing a training assessment in your organization and measuring the impact of learning for the individual, the department, and the organization. Lessons learned from this process at Catholic Relief Services and Population Services International will be shared.

*Adriana Noll, Catholic Relief Services; Marie-Laure Curie, Population Services International*

3:15 – 4:30

**Room 201 – HR: Operational**

**HR Systems – What’s Popular, What’s Not, and Why**

If you are considering a system or wish to discuss the current pros and cons of a system you are using, this session has it all. The structure will be a World Café-format where attendees will migrate to topical tables on HRIS, Talent/Performance Management and Applicant Tracking systems. Facilitators will lead the discussion on systems and participants will “speed date” through the topics to discuss with colleagues: vendors, support, and functionality. Attendees should have experience in at least one of these systems to contribute to the dialogue. Limited to 48 participants.

*Conducted in a World Café format*

3:15 – 4:30

**Room 204B – IT: Technical**

**Diving into Virtualization**

Virtualization has become the foundation of contemporary computing infrastructure, but taking the first step can be daunting. See how virtualization can be deployed and utilized through the case study of a small, ongoing server consolidation project. Learn about the many practical technical considerations of planning a solution appropriate to the unique needs in a non-profit context and explore the disruptive – but hopefully positive – effects that virtualization and cloud computing can have on an organization’s IT strategy and overall mission.

*Geoff Froh, Densho; Richard Machanoff, International Partnership for Microbicides*

3:15 – 4:30

**Room 204C – IT: Business**

**Mobile Technology/Tools for NonProfits**

There are over 5 billion mobile phones on the planet. This simple tool provides unprecedented opportunities for organizing, communications, and service and information delivery around the world. Come find out what people are actually doing with mobile technology, including what applications they are using and how nonprofits can jump on the mobile bandwagon for increased results.

*Bill Lester, NPOKI*

**4:30 – 5:00 Closing Session and Prizes**  
(Ballroom B)

8:00 – 9:00 Registration

9:00 – 9:30 Welcome and Opening Remarks –  
Ballroom B

9:30 – 10:30

**Ballroom B – Keynote Address**

**Surrounded by Geniuses: Unlocking the Brilliance  
in Yourself, Your Organization and the World  
Around You**

In today's challenging business environment, innovation is more important than ever. Yet most companies and organizations lack a clear understanding of how to nurture innovation and how to unlock the real genius in all of their people and a world around them filled with limitless possibilities. Join Alan Gregerman on a fun-filled and fast-paced journey around the planet to discover the real future of innovation and organizational success--a journey that is sure to challenge your thinking about yourself, your colleagues, the very nature of ideas, and what really matters. In the process, you'll discover the real keys to leading innovation, fresh thinking, and driving greater value to those we have the privilege to serve.

*Alan Gregerman, Author*

**Get your complimentary book autographed by  
Alan Gregerman in Ballroom B**

10:30 – 10:45 Break

10:45 – 12:00

**Room 207B – Cross-Operations Legal**

**The Social Media Explosion and Its Legal Impact  
on the Workplace**

Social Media has exploded in workplaces – from Twitter and Facebook pages, to blogs, and online forums. What are the legal implications of these tools and access on recruitment and hiring? How can an organization protect itself from employee online disparagement? Are new policies needed regarding personal and organizational privacy and intellectual property? This session will provide attendees with an understanding of the legal climate and what policies are enforceable. The panel will discuss practices to institute in your organization. Participants will have the opportunity to ask their questions and share their experiences with attendees.

*Neil V. McKittrick, Ogletree; Deakins, Nash, Smoak & Stewart,  
P.C.; Leslie White, Croydon Consulting LLC*

10:45 – 12:00

**Room 207A – Cross Operations General**

**Global Operational Risk Management – Strategies  
for Mitigation**

There are a number of operational risks that your organization faces. Do you have appropriate mitigation strategies in place? In this session, panelists will discuss the following risks: security, local law compliance, fraud and donor compliance, providing mitigation strategies for each. Attendees will then participate in a facilitated discussion and share mitigation strategies utilized by their organizations. Strategies discussed will be collected, compiled and distributed to attendees.

*Joe Gleason, National Democratic Institute; Vandana Gupta, Elizabeth Glaser Pediatric AIDS Foundations; Doug Horner, Elizabeth Glaser Pediatric AIDS Foundation; Joan Keston, Keston & Associates; Dan Reilly, National Democratic Institute*

10:45 – 12:00

**Room 206 – Cross Operations General**

**The Decision Driven Organization – A Key to  
Successful Change Initiatives**

All organizations undergo change initiatives and reorganizations, but many never succeed. Why? Often the focus is on structure and not on a key element to high performance - decision effectiveness. This session will provide tools for evaluating your organization's decision effectiveness, how to conduct a decision audit, and the six steps to become a decision driven organization. Return to your organization with a new way of improving organizational performance.

*David Cooper, Bain & Company*

10:45 – 12:00

**Room 209AB – Cross Operations IT**

**Understanding the Value of GIS and ITIL for Your Organization**

How Can GIS (Geographic Information Systems) be integrated and benefit your organization? Learn the value and impact that applied GIS can have in aiding an organization toward meeting its mission. The value of mapping key data (programmatic, financial, indicator metrics) cannot be under-estimated in its role in making informed organizational decisions for choosing program activities and assigning appropriate funds and resources.

An Introduction to the Information Technology Infrastructure Library framework or ITIL for the Non-Technical Manager: This presentation will explain the ITIL framework, an internationally developed and recognized standard for information technology management, and how it can help aid organizations to bring order from chaos.

*Kurt Eckerstrom, ESRI; Nicholas Evans, Airborne Consulting*

**12:00 – 1:25 LUNCH**

**Lunch location:**

Ballrooms A and B – 3rd Floor

**Lunchtime Events**

1) **Procurement Reform at USAID** Lisa Gomer, USAID’s General Counsel, has been instrumental in reviewing regulations and procedures that need streamlining or simplifying (source origin anyone?). Come hear from her what has been done to date and what is being considered. Give her your take on the reforms thus far and what’s still to come.

**Ballroom B: 12:15-1:15**

2) **“The Multiple Hat Club” Lunch Forum** If you are a COO or have several departments reporting to you, please join us for a lunchtime gathering. Meet colleagues and have the opportunity to discuss your unique challenges. This Session has been recommended by the Cross Operations Steering Committee.

**Room 208AB: 12:15 – 1:15**

**Visit member-recommended Exhibitors**

Ballroom A – 3<sup>rd</sup> Floor

Everyone is encouraged to visit the Exhibitors in the 3rd Floor Ballroom A – any time!

Get your stickers for visiting – you need 10 to be eligible to **win a prize** from InsideNGO! Leave your business card with exhibitors for even more chances to win. Don’t miss the InsideNGO raffle drawing at the Award Ceremony on Wednesday!!

2:00 – 3:15

**Room 207B – Cross Operations Legal**

**Navigating Export Controls & OFAC: Traps to Avoid & Guidance for Compliance**

Join this informative presentation and attendee discussion. The first part of the session will review export control laws and provide guidance in avoiding the traps when sending goods or materials internationally particularly if working in a country subject to sanctions. The second part of this session will describe the essential elements of an anti-terrorist finance program and guidance in developing OFAC compliant policies and procedures that meet the standards of good practices.

*Christine Filosa, Education Development Center; Carolyn Klamp, Klamp & Associates, PC; Roland Shrull, Middleton-Shrull*

2:00 – 3:15

**Room 207A – Cross Operations General**

**HQ & Field: Insights & Strategies for Creating Effective Senior Team Relationships**

Tired of talking about silos and the strains between HQ and Field? Led by a Chief of Party, former Country Director/DVP of Field Operations and a Senior Director of Global HR, this session will provide insights and strategies for creating more dynamic, effective working relationships from a field perspective. Participants will then be led through a practical exercise which can be used as a tool in diffusing strains in the relationship.

*Daniel Doucette, EngenderHealth; Jason Phillips, International Rescue Committee; Mannasseh Phiri, Population Services International; Paulina Sanchez, Conservation International*

2:00 – 3:15

**Room 206 – Cross Operations General**

**Creating a Culture of Ethics**

While NGOs have laudable missions, are their internal practices and behavior as exemplary? This session will highlight approaches to consider in developing and implementing a culture of ethics in your global organization. This session will include a brief break-out for attendees to share some of their practices. Examples of good practices will be collected, documented, and provided to attendees.

*Chris Buchholtz, RTI; Warren Fairfax, RTI; Mary Reiss, RTI*

1:25 – 1: 50 Awards and Prizes! (Ballroom B)

2:00 – 3:15

**Room 209AB – Cross Operations IT**

**How to Develop an IT Strategy in the Cloud: Building a Business Case**

Learn the key IT Strategy points for utilizing Cloud based services, including an overview of the different Cloud models, how to build a business case and ROI, how to determine functional requirements and balance those with other technical, security, and compliance issues. The session will include three case studies covering Google Apps and Microsoft Live 365.

*Theron Kelso, The Nature Conservancy; Scott Mills, Academy for Educational Development; John Talieri, Pact*

3:15 – 3:30 Break

3:30 – 4:45

**Room 207B – Cross Operations Legal**

**New Office Registrations: Options & Considerations**

There can be several options to choose from when registering to do business in a country. What are the options? What questions should one ask when considering how to register as an organization to do business in a foreign country? This session will provide practical information about registration options, the importance of an exit strategy on registration considerations, and lessons learned in the process. This session will also offer a forum where participants can openly discuss the successes and challenges they have faced. Come prepared to share!

*Stephanie Calves, Elizabeth Glaser Pediatric AIDS Foundation; John S. Russell, K&L Gates LLP; Chris Rader, RTI*

3:30 – 4:45

**Room 207A – Cross Operations General**

**The Strategic Rise of KM**

The Knowledge Manager role is on the rise in the NGO community. How are organizations defining the role? What value does this role bring to your organization? Led by a panel of current Knowledge Managers, this session will explore the differences this role plays in both small and large organizations. This session will also explore how the role is evolving. Participants will leave this session with ideas of how this position can have a strategic impact in their organization.

*Luz Marina Alvare, International Food Policy Research Institute; Paul Moriz, National Endowment for Democracy; Scott Yetter, CHF International; Rebekah Usatin, National Endowment for Democracy*

3:30 – 4:45

**Room 206 – Cross Operations General**

**Capacity-Building – Models for Success**

With resources scarce, organizations need strategies for capacity-building that are affordable, effective and culturally relevant. Led by TCC Group and Pact Inc., this session will focus on operational capacity building from an individual, organization and cohort perspective. Participants will leave with a clear definition and framework of capacity building, models and approaches to consider in building capacity, and ways to assess impact in a global context.

*Shelly Kessler, TCC Group; Susan Misra, TCC Group; Olga Yakimakh, Pact*

3:30 – 4:45

**Room 209AB – Cross Operations IT**

**Planning Infrastructure For Your Field Offices – What Does It Take?**

Global IT infrastructure takes more than bandwidth. Come hear about one organization's experience in bringing a global network to field offices around the world in a project that impacted every office, program, and department in the organization.

*David Goodman, International Rescue Committee; Jason Phillips, International Rescue Committee*

**Thank you for contributing to this year's InsideNGO Annual Meeting. We hope to see you next year. Mark your calendar now for July 31-Aug 2, 2012.**