

You are Invited!!

Annual Meeting—Finance, Grants & Contracts

July 27-28, 2009

**George Washington University
Marvin Center
800 21st Street, NW—Washington, DC**

July 27

8:15—9:00 Check-in & Continental Breakfast
9:00—5:00 Sessions
5:00—6:30 Cocktail Party

July 28

8:00—9:00 Functional Break-outs
9:00—4:30 Sessions

Finance, Grants and Contracts

Join colleagues at this year's 2009 Annual Finance, Grants & Contracts Meeting to share resources and learn best practices in finance, grants and contracts management for international development and relief organizations.

You'll hear from industry experts and from colleagues in plenary sessions, on panels, through structured conversations, and from current and past US Government representatives who will listen to our concerns and bring you up to date on the most recent federal regulatory changes and environment.

You'll be able to choose from a rich array of sessions primarily tracked as Finance, Grants and Contracts, and others that will offer Personal/Professional Development opportunities. Some sessions will be geared toward Young Professionals, and you will have opportunities to join a functional breakout to discuss topics of interest to you and other attendees.

Whatever your interest, experience level or need, you'll find the people, ideas and resources you need to be more effective in your job. Make valuable connections during lunch, breaks and the cocktail reception. Meet new colleagues and reconnect with old friends.

It's not too late..... If you have a session idea, want to serve on a panel or know someone who has a best practice to share, contact Mike Walsh mwalsh@InsideNGO.org or Alison Smith asmith@InsideNGO.org.

We look forward to seeing you in July!

A Sampling of the 30+ Sessions....

FINANCE TRACK

Currency fluctuations and the Havoc they Wreak on Grants, Movement of Cash and More; Revised Form 990; Economic Challenges: What's an NGO to do?; Building reserves, Budgeting for Uncertainty, and Financial Contingency Planning; Communicating Financial Information to Non-Financial types: Metrics, Dashboards and Financial Reporting; Indirect Costs in a "Cap" Environment; Fraud Management; FASB and SAS Update

CONTRACTS TRACK

Acquisition vs Assistance; Contracting Toolkit: Essential Items to Manage under the Federal Acquisition Regulations; Proposal Management; Contracts Update

GRANTS TRACK

SF425 +The Coburn-Obama Act+ARRA=A New Federal Grant Financial Reporting Headache; Debunking some Troublesome "Urban Myths"; Working with Other Partners; Constructive Engagement with USAID; Export Restrictions – Crossing the Regulatory Terrain of Sudan, Pakistan and Afghanistan; What's in store at USAID in 2010?

PERSONAL/PROFESSIONAL TRACK

Toward Giving and Getting Better Performance Appraisals; Leading with Intent; Productivity Tools to Help You Professionally and Personally; All the World's a Stage: Presentation Skills to Help You in Your Career; Decision-Making; Developing a Project Management Toolkit; Building and Managing a High Performance Remote Team; Facilitation Skills: Enabling Groups to Succeed; Delegation: Have I got a job for you!; Influence without Authority

See the following pages for details and check our website regularly for updates.

To register and for more information go to www.OutsideNGO.org.

Session Details

GRANTS TRACK

SF425 +The Coburn-Obama Act+ARRA=A New Federal Grant Financial Reporting Headache

New Federal reporting requirements will cause headaches as we scramble to find data previously not requested or new forms previously filled out separately by field and HQ. Join us for this session which will review the new requirements and how they'll be managed across the organization.

Debunking Some Troublesome “Urban Myths”

If you're new to the field of international programs, it won't be long before someone tells you, “USAID requires that!” Join this session to discuss commonly misunderstood policies and practices with respect to federal funding and understand what the straight story is.

Federal Policy Advocacy Update

A review of our “advocacy agenda” shows that much remains to be done in getting federal policies properly applied and in making sure that new federal initiatives are implemented in ways that avoid undue burden and cost. This session will provide an update on InsideNGO's Advocacy Agenda.

Developing the Next Generation of Grant Managers

Now is the time to prepare our successors. How do we develop our staff to lead the grant management function in the not too distant future? Panelists will speak about developing effective leaders for the profession. Participants will contribute to a list of core competencies and required experiences, along with best practices for mentoring and developing these professionals.

Working with Other Partners

What's the formula for the chemistry between partners that assures success? Few organizations go it alone, especially on large, complex programs. What contractual, financial and administrative structures support effective collaboration? Panelists will discuss best practices and participants will contribute to initial steps to the development of standard templates, policies and guidance in “sub-ing” with each other.

Getting Beyond USAID – A Multi-Donor Matrix of Rules & Regulations

What are we getting into with other donors? Panelists will review the idiosyncrasies of other Federal and Multi-lateral donors. Participants will break into groups by sector (e.g., health, humanitarian relief) to complete the donor matrix.

Managing Awards with Local Organizations

How do you manage your risk while developing a local NGO's capacity, especially from half a world away? How do you cover indirect costs for local organizations? If they provide cost share, how do you assure compliance and accurate reporting? Panelists will address operational issues in working with local organizations.

Constructive Engagement with USAID

Rolling-over or pushing back, are these your only negotiating positions? How often are you told to give-in on an issue to avoid antagonizing USAID? Everyone wishes to have a collaborative relationship with their Agreement Officers and the Technical Representatives, but how do you establish and sustain that tone? The panel will include representatives of the NGO community and USAID in discussing successes, failures and lessons learned in establishing an effective working relationship.

Export Restrictions – Crossing the Regulatory Terrain of Sudan, Pakistan and Afghanistan

Working in Sudan, Pakistan and Afghanistan is difficult enough without the added risk of managing the export restrictions and licensing requirements for these countries. Panelists will review the regulations and how to effectively manage them in generating a list of best practices.

CONTRACTS TRACK

Acquisition vs. Assistance

Confused by contracts? Join colleagues in this introductory session as we sort through the primary differences between grants, cooperative agreements and contracts.

Contracting Toolkit: Essential Items to Manage under the Federal Acquisition Regulations

If you're considering a direct contract with the Federal Government, or even a subcontract, you'll need to meet a minimum standard for financial, accounting, time-keeping and billing, as well as compliance monitoring and risk management. Panelists will describe changes needed by NGOs to take on Federal contracting.

Proposal Management

With NGOs increasingly competing for contracts, this panel will address some of the best practices in managing the competitive process and taking your organization to the next level.

Session Details

Subcontracting: Looking Out for Your Interests

What flows down from a prime contract? How do you price a subcontract to manage your risks? How do you manage problems? Panelists will share their experiences in how to protect your interests under a subcontract.

Contracts Update

This is an opportunity to catch-up on the latest changes under the Federal Acquisition Regulations. What you don't know will hurt you. For example, the new Mandatory Disclosure requirements have teeth in them that require timely compliance or risk suspension and debarment.

FINANCE TRACK

Economic Challenges: What's an NGO to do?

Furloughs, layoffs, cutbacks on travel and more. How are NGOs dealing with the economic downturn? Come share best practices and learn how your peers are addressing these tough issues both here in the US and in the field.

Building Reserves, Budgeting for Uncertainty, and Financial contingency planning, What makes sense in the current environment?

Never before has the importance of financial contingency planning, budgeting for uncertainty, having reserves, and determining what kind of investments make sense for an NGO been so clear. Learn how small and large NGOs are approaching these tough issues and positioning themselves for when the economic conditions change.

Fraud Management

Internal Controls notwithstanding fraud is difficult to avoid. Hear from colleague agencies problems they have faced and steps they have taken to deal with this ever-present problem for NGOs.

Indirect Costs in a "Cap" Environment

Come discuss with colleagues strategies for Full Indirect Cost Recovery in a "cap" environment; explore case studies of various donor approaches to paying indirect costs.

Revised Form 990

The New 990 is now a reality! With unlimited access to IRS Form 990 via Guidestar, more and more stakeholders are using the information on the form in making decisions about grants, contributions and other financial issues.

Communicating Financial Information to non-financial types: Metrics, Dashboards and Board reporting

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. Learn how to spot common confusion and determine what is critical to communicate.

Currency Fluctuations and the Havoc they Wreak on Grants, Movement of Cash and More

Tails you lose, heads they win. Explore approaches to dealing with funders who want to benefit from foreign currency fluctuations no matter what.

Accounting Update

Find out what changes may be in store for you including international convergence with IFRS, FASB statement on Fair Value FAS 157, UPMIFA, FASB Staff Position 117-1, related party disclosures, gifts in kind, review of sample disclosures.

PERSONAL/PROFESSIONAL TRACK

Toward Giving and Getting Better Performance Appraisals

Discover how performance management can be an important link between organizational strategy and employee performance. Review the keys to setting realistic and meaningful performance goals.

Leading with Intent

Accomplishing results through and with a team requires consistency of leadership, and the ability to clearly articulate intended outcomes. This session is focused on identifying challenges in leadership communication and working together to use some road-tested leadership practices to improve the odds that the things you want to have happen – are what actually happens.

All the World's a Stage: Presentation Skills to Help You in Your Career

Don't be held back in your career because you are uncomfortable speaking in public. Learn the importance of using stories, tone of voice, speed of speech, eye contact, breathing, gestures and more. Find out how you can develop a confident, credible and authentic speaking style.

Session Details

Facilitation Skills: Enabling Groups to Succeed

Learn how to be a "guide on the side" who relinquishes control to the group, leads two-way communication, synthesizes the collective knowledge and returns the new understanding to the group.

Building and Managing a High Performance Remote Team

Learn tips on how to manage performance when you are not in the same office, country or continent

Productivity Tools to Help You Professionally and Personally

Tech tools used to be reserved for those with the highest technical acumen and the largest budgets. Not anymore! Today's web-based collaborative tools deliver cutting-edge opportunities to work with volunteers across the globe and improve productivity at work and at home. Come hear about some of the tools that will help you accomplish more in less time, and share your own tips as well.

Decision-Making

Decisions, Decisions, Decisions... This entertaining session will look at some of the ways that leaders, groups, teams, organizations make decisions and go through some pros/cons, and theory and practice about how to get better at the process of deciding.

Influence without Authority

Accomplishing work related tasks is easier when you can tell people what to do and they leap up to do them. Wouldn't that be nice if it happened all the time? Join this session to get some best practices for how to accomplish the tasks on your list when your success depends on the actions of others.

Delegation: Have I got a job for you!

Successful managers and leaders must delegate critical tasks to others. Find out the key steps in delegating, why delegation can fail, and what you can do to improve the chances that the delegated task will be done and done well.

The Good Enough Box

Setting priorities, limits, making trade-offs – these are a daily part of our existence. In a sector where there is never a shortage of things to do and critical impacts to mission-focused activities – how do you make decisions about what's "Good Enough"?

Developing a Project Management Toolkit

Learn basic Project Management Skills that are essential no matter what position you hold in your organization.

OTHER

We're Listening: Tell us how InsideNGO can help you

InsideNGO's Board of Directors wants to hear from you. Meet with Board members at tables over lunch to discuss what InsideNGO is planning and tell the Board how they can help you more in your role as CFO's and/or Grants/Contracts staff.

Functional Breakout Sessions: Breakout Groups, Best, Practices

Talk with your peers in groups that focus in your specific needs in your organization. Hone in on those problems that are particularly bothering your organization, get tips from your colleagues, and share approaches to problems you are facing in these turbulent times.