

You are Invited!!

Annual Meeting—Finance, Grants & Contracts

July 12-13, 2010

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

July 12

8:15—9:00 Check-in & Continental Breakfast
9:00—5:75 Sessions
5:15—6:30 Cocktail Reception

July 13

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

Finance, Grants and Contracts

Join colleagues at this year's 2010 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 are 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.

We look forward to seeing you!

A Sampling of the Sessions....

- Financial and Organizational Metrics and Effectiveness Indicators: Can we monitor organizational health?
- Subaward Monitoring and Support: Mitigating Risks while Building Capacity
- Working with Host Governments—Designing for Accountability and Results
- 990 Implementation: Lessons from the Trenches
- Procurement Reform at USAID
- Grants Under Contracts
- Leveraging Knowledge to Enhance Mission Performance
- Grants/Contracts Career Paths for Young Professionals

Session descriptions follow.....

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

Session Details—Keep checking for updates.....

KEYNOTE ADDRESS

Allison Stanger in her book [One Nation Under Contract: The Outsourcing of American Power and the Future of Foreign Policy](#) describes the new reality of 21st Century foreign policy and the urgent need for our government to adapt. Dr. Stanger lays out in detail the outsourcing of American government, not only in the well-documented military sphere, but in our development aid and diplomacy. In her keynote address, professor Stanger will discuss how our government has given up much of its ability to implement foreign policy and how it has lost the ability to oversee the implementers, private and nonprofit, whom it has hired.

FINANCE TRACK

Allison Stanger Unplugged

Join keynote presenter, Allison Stanger for an informal discussion following her keynote address. Find out first hand how the administration responded to her thought-provoking book.

Stay Ahead of the FASB Curve

The FASB's specialist for not-for-profit organizations, Jeffrey Mechanick, will fill you in on the FASB's most recent guidance and what's in the pipeline. Topics Jeff will cover include: key developments in the standard-setting environment; continued international convergence/improvement efforts in the accounting for financial instruments, leases, and (non-donation) revenue; fair value (FAS 157) implementation matters, especially regarding gifts -in-kind; and various FASB disclosure projects.

990 Implementation: Lessons from the Trenches One Year Later

The new 990 has changed the nonprofit reporting landscape and requires hard calls by all. Increased scrutiny and reporting on governance, executive compensation and most critically for NGOs the new schedule F on foreign activities and investments require us to provide details on internal policies and practices never before requested. Discuss how the new 990 is forcing changes to systems, processes and more, and walk away with practical tips so that you are ready to file with confidence.

Full Cost Recovery in a “Cap” Environment

Come discuss with colleagues strategies for full cost recovery in a “cap” environment. Learn of our community's effort to dialogue with foundations to try and resolve the current impasse.

Internal Audit: In-sourced, Outsourced, or Co-sourced?

Come learn about various models for handling the internal audit function. Explore the various ways that any-sized NGO can cover the internal audit/compliance function.

Working with Foreign Currencies

Learn how three organizations manage their foreign currency transactions to minimize FX risk -- including how they account for and report on non-USD contributions and program spending, and hedge to protect purchasing power. Take home documented policies and procedures that will help you deal with the complicated world of foreign currency.

Red Flags and the Signs of Fraud

What are the signs that NGOs should look for in discovering fraud? What controls can mitigate them.? This expert panel will discuss the various signs that can lead to detection, share experiences of what tipped them off to fraud in their organization and discuss ideas of how you can help protect yourself.

Financial and Organizational Metrics and Effectiveness Indicators: Can we monitor organizational health?

Increasing pressure on NGOs to perform operations efficiently, effectively and with appropriate controls are driving the need for more tools and benchmarks that we can use to measure outcomes. Come learn how nonprofits are using metrics to better manage finance and operations to assess organizational health.

Field Tested and Ready to Go! Risk Management Reporting

Well implemented controls reduce risk, create confidence and protect your organization and its mission. Inherent to controls, however, is the need to track and evaluate them. Using current accounting systems, Internews filters information into a powerful report. This easy to read report offers management a swift look into where basic cash/fraud and compliance risk resides, providing insight for informed decisions. Accessible to local staff, the report has worked as a catalyst for improved internal controls and better cash management.

Charity Navigator: Financial Measures and Beyond

What is in store with the next generation of charity effectiveness rating systems? How should nonprofit 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.

Strategic Cost Containment Measures and Reserve Policies: Making the Best of a Tough Situation and Planning for Your Organization's Future

Furloughs, layoffs, cutbacks on travel and more; is this the new reality? Never before has the importance of financial contingency planning, budgeting for uncertainty and considering reserve policies been so clear. Learn how colleague agencies are approaching these tough issues and positioning themselves for going forward in uncertain times.

Session Details—Keep checking for updates.....

Playing Audit "Hard Ball"

The combination of a critical federal report on the of-federal audits performed under OMB Circular A-133 and tighter auditing standards on internal controls in financial statement audits has led to a situation in which a lot more organizations are receiving in which there are findings. Given that these reports are now being a federal website and are being used in pre-award reviews of grant applications, the implications of more findings are troubling. This session will provide practical advice for auditees on how to address findings and reduce their potentially adverse impact.

Traditional Fund Transfer Systems and the Patriot Act

Governments around the world have required banks and institutions to report suspicious monetary activities, for surveillance and analysis. In the US, the most prominent law for financial intelligence is the USA Patriot Act. This session will familiarize NGO practitioners with the Patriot Act and an informal fund transfer system known as *Hawala* common throughout the Middle East, Asia and Latin America. Learn how to avoid problems by knowing what is legal and what is not. Share tips about the best way to transfer money within the confines of the Patriot Act, and find out how you can use legal hawalas, while avoiding those that are not.

GRANTS TRACK

Making it work: Relations with the Field

Is there a productive tension between HQ and the field, or simply tension? How do you get beyond an “us versus them” mentality? What are some useful tips for building relations with the field, and their capacity? The panel will include field and HQ representatives who will share ideas on managing the relationship more effectively.

Policy Update from Department of State

What are the latest changes to federal assistance policy at the Department of State? What issues are they working on right now? Terrorist Financing/Partner Vetting, NICRAs, improper payments, subaward monitoring, closeouts and more. Hear directly from Georgia Hubert the Director of Federal Assistance at State on these and other important topics affecting your work.

Procurement Reform at USAID

Hear from top USAID officials about procurement reform plans being considered to support their new development agenda. USAID intends to work closer with host governments and local organizations. What do these and other changes mean to your organization and the way it does business?

Choosing the Right Instrument: FOGs, Performance-Based Financing and more

Sometimes a 55 page subgrant doesn't quite fit the circumstances of your award. What are other ways to convey resources to local entities? What are Fixed Obligation Grants and when are they most appropriate? What is Performance-Based Financing and can it be used effectively beyond the health sector? How do you document a grant-in-kind? When do you use a subcontract, rather than a subaward? The panelists will discuss different mechanisms, their pros and cons, based on their experiences.

Subaward Monitoring and Support: Mitigating Risks while Building Capacity

Deficiencies in subaward monitoring is one of the most common audit findings. How do you develop, conduct and document effective monitoring plans and how do you do this to support the development of local subawardees? The panelists will lead a discussion on how to design and manage the monitoring process to support your development objectives.

Surge: When Disaster Strikes - Lessons learned from Haiti, the Tsunami and Rwanda

What happens when a natural or man-made disaster destroys your project office, cuts communications and your organization must quickly shift from development to relief work? How do you get equipment and supplies into the affected area when transport is limited? What do you do to manage the deluge of contributions and offers of assistance? Learn from those who work directly with emergencies on how to prepare for and handle sudden relief work and its huge demands on logistics and financial systems.

Subaward Cookbook: What Should be in a Local Subagreement

The ultimate value of an agreement is when things go wrong – and there's language to help resolve the issue. Does your subagreement cover realistic contingencies? Do you adequately translate the results of the risk assessment into a workable special condition? What laws apply? What flows down? Walk away from this session with a template of what clauses you should have in your subaward agreements.

Compliance Shop Models

How do you manage the complexity of compliance in a global operation? The panelists will share their models for managing the responsibilities of keeping their organizations out of trouble and on-track with policies and procedures.

Session Details—Keep checking for updates.....

Working with Host Governments - Designing for Accountability and Results

How do you hold the host government to the terms of your subgrant when they're a sovereign entity? While NGOs have always worked with host governments, donors are reemphasizing it, expecting NGOs to partner at different levels. NGOs are now making direct subawards to government entities and are expecting the government to comply and perform. How do you structure your instruments so that the work is done and the rules are followed? The panel will share their stories and best practices in working with local and national government organizations, requests to pay government staff and more.

Advocacy Update and Idea Sharing

Advocacy efforts have accomplished some gains over the past few years, but much remains to be done. Share your thoughts and suggestions on how InsideNGO can be your ears and voice with government agencies, the Administration, Congress, and in the field.

Teaming Agreements: Can't we all just get along?

"Treat others as you would like to be treated." The Golden Rule seems tarnished when it comes to teaming agreements. Few organizations can implement large programs by themselves now, placing a premium on effective partnerships. Are there certain principles we can agree on as a basis for building effective teaming agreements among members? Join this session to discuss constructing an agreed upon template for teaming and other agreements.

Grants/Contracts Career Paths for Young Professionals

A panel of senior grants/contracts professionals will share their career journeys and lessons learned with young professionals. The panelists will suggest skills and experiences that are essential to advance in this field. The session will be interactive, with participants encouraged to ask questions of seasoned professionals.

CONTRACTS TRACK

Introduction to Contracts and Grants

Confused by contracts? You are not alone. Join colleagues in this introductory session that highlights the primary differences between grants, cooperative agreements and contracts.

Grants Under Contracts

It may look and sound like a grant, but what's a GUC? How are grants awarded under a contract managed differently than a typical subgrant? When are they used? Learn and discuss with experienced practitioners how to manage these awards, including the procurement demands of grants-in-kind.

Taking on Contracts? What you Need to Know

Many organizations are venturing beyond grants and cooperative agreements into the more demanding, less forgiving world of Federal contracts and subcontracts. What are the major differences and what do these mean for your operations? Do you need to upgrade your financial systems? Will contracts affect the nature of your organization? The panelists will review the differences and describe their experiences in taking on the increased demands of Federal contracting.

Contracts Update

What you don't know can hurt you. Learn the latest revisions to the FAR, AIDAR and other regulations – and how they affect your work. Discuss the latest trends in Federal contracting. This is an important update for those responsible for the administration of Federal contracts – and subcontracts.

IQCs

IQCs seem to be such a cornerstone of USAID contracting. Task Order awards under Indefinite Quantity Contracts account for billions of US dollars in foreign assistance. Maximizing use requires quick action by all. How do these streamlined contracting mechanisms work and how can you become a part of an IQC team? Learn from experienced recipients how to maximize recovery. Discuss best tips and tactics with colleagues well versed in their use.

PERSONAL/PROFESSIONAL DEVELOPMENT TRACK

Leveraging Knowledge to Enhance Mission

Performance: Knowledge Management for NGOs: What is it? Do I Need This? How to Get Started?

Increased accountability for impact has led NGOs to take greater advantage of what they are learning to both demonstrate progress against goals, and improve future performance. This session will highlight the origins of knowledge management, explain why we need it and offer some ideas on how to get started. Explore the links and relationship between knowledge management and measurement and evaluation and find out how interested organizations can get started on their own "knowledge journey."

Have I Got a Job for You! The Art of Delegating

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.

Session Details—Keep checking for updates.....

Decisions, Decisions, Decisions...

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

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.

The Good Enough Box and Setting Priorities

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"?

Managing Divisive Situations

Priorities that appear to compete with one another are inevitable in any organization. Examples such as centralized decision making versus inclusive decision making, strong leadership versus responsive leadership abound. This session will explore common polarities and provide an engaging and interactive learning opportunity for managing them effectively.

Authentic Leadership

In the past five years the notion of authentic leadership has emerged as a compelling force. This session will introduce the basic components of authentic leadership and tools for those who wish to devote themselves to an authentic approach.

Leadership Development for Emerging Leaders

This session offers a framework for leadership development within organizations and for those seeking greater leadership opportunity. The emphasis in this session is on how organizations can begin to develop their own leadership "bench strength" and for those who are emerging leaders and want to develop their own leadership development path.

Increase Your Odds of Selecting the Right Person

Learn interviewing tips and techniques that will help you select the right person for the job. Then once selected, find out how you can help the person succeed through coaching and the importance of goal setting.

Social Networking for Non-Profits

Gain clarity and understanding of the essential elements of social media and social networking. Learn how to create your organization's strategy map for the social web and discover how embracing social media has changed the way many non-profit organizations work.

Story Telling

This session offers participants an opportunity to learn about the value of storytelling at all levels in the organization. The session will explore three types of stories that you can use to communicate, introduce, explain and persuade. Each type offers participants a different set of tools to use to improve their effectiveness.

Change Management

Change is often complex, difficult, and challenging for the individuals and organizations involved. This session will explore the cycle of change in an organization from beginning to end, related natural responses, and strategies for anticipating and mitigating the impact of change.

Emotional Intelligence

This session offers an overview of the basics of emotional intelligence and how it impacts work. Three key dimensions of EQ are explored: self-awareness, self-regulation and empathy. These three dimensions impact the leader and organizations will be discussed.

Technology in Chaotic Times

Poverty is growing at a faster rate than population. Donations continue to grow but it's not enough to turn around the problem. We need new ways for addressing the issues. New partnerships and greater collaboration among NGOs, governments, corporations and citizens is needed. The N-Generation is increasingly interested in combining business and social impact, changing the nature of corporate social responsibility. We also need a greater use of technology to build capacity by orders of magnitude and deliver programs in new ways. This means freeing technology in our organizations from "lights-on" operational infrastructure that dominate our current time and budgets to more "mission-moving" uses of technology. This points us back to partnerships and shared services to free the creative energies of our organizations. We must collaborate or perish as irrelevant.