

Presented By:



March 9–11, 2010  
Arlington, VA

Earn up to 18 CPE Credits

# The 2010

# Grants Management Training

Obtain the Knowledge and Skills to Effectively Manage the Grants Process at Your Organization

- Course 1** **Understand Grant Administrative Requirements and Cooperative Agreements**  
Develop insight into uniform administrative and financial requirements necessary for grant compliance and learn to efficiently and effectively manage work processes
- Course 2** **Cost Principles and Allowability for Grants**  
Understand the importance of indirect and direct costs and how to use and apply cost principles to your award
- Course 3** **Audit Requirements for Grants**  
Cultivate an understanding of audit requirements and how to conduct and prepare for a grant audit

In Association with:



Learn how to Manage Your  
Grants More Effectively

[www.GrantsMadeEasy.org](http://www.GrantsMadeEasy.org)

# Understand Grant Administrative Requirements and Cooperative Agreements

Course 1 | March 9, 2010

8:30

Registration and Continental Breakfast

9:00

## Overview of Administrative Requirements

- Understand the administrative requirements under OMB Circular A-102 and CFR Part 215
- Examine the development of administrative requirements as well as recent and planned changes

## Standards for Financial Management Systems

- Review grant recipient financial system procedures and conform with the administrative requirements
- Prepare and develop a reporting schedule for financial and progress reports

## Property and Procurement Standards

- Identify standards for title, use and disposition of real and intangible property, equipment and supplies
- Examine and avoid common pitfalls resulting from insufficient property management and procurement standards

## Reports and Records

- Decide when grant records may be discarded and what information you must keep
- Learn about records management and disposition as it applies to your agency or organization

## Reasons to Attend

**1 Understand** how administrative requirements are essential to the award process

**2 Manage** grants and cooperative agreements to ensure optimum project performance

**3 Examine** the cost principles and audit requirements from preparation to execution

**4 Stay accountable** and transparent through the grants lifecycle

## Who Should Attend

- Executive Directors and CEOs
- Fundraisers/Development Officers
- Program Administrators
- Grant Managers
- Grant Writers
- Grantee Financial Staff
- Auditors
- State, and Local Health, Social Service, and Research Agencies
- Trustees Interested in Improving Evaluation and Performance
- Community-Based Development Organizations (CBDOs)

...and anyone involved with grants administrative management and auditing

# Understand Grant Administrative Requirements and Cooperative Agreements (continued)

Course 1 | March 9, 2010



## Changes in Budget and Scope

- Identify, determine and value proposed changes in budget and scope
- Collaborate with awarding agency to obtain approval for budget changes

## Project Performance

- Monitor and report program and financial performance goals and objectives
- Ensure optimum performance of sub-recipients and their beneficiaries

## Examine the Award Agency's Role

- Examine monitoring methods, audits and sanctions by the awarding agency
- Learn how agencies and auditors review internal controls through site visits

## Termination and Enforcement

- Use administrative requirements to guide corrective actions and enforcement measures
- Compile applicable federal, state and agency requirements for the enforcement, sanction and termination of awards overseen by contractors and subcontractors

## After-Award Requirements and Contract Provisions

- Determine which contract clauses are required on awarded grants contracts
- Execute closeout procedures and subsequent adjustments effectively

4:00  
Adjourn

"I will apply the knowledge I gained to better understand the grants process."

SANDRA MOSLEY, VIRGINIA DEPARTMENT OF SOCIAL SERVICES

# Speaker Biography

**Robert M. Lloyd** is a respected authority on policies affecting the acquisition, administration and audit of federal grants and contracts. The former executive director of the Grants Management Advisory Service, Mr. Lloyd has more than 35 years of experience in federal award implementation and oversight. After extensive work with two large federally funded organizations and a national firm, he formed his own management consulting practice in Washington, DC, in 1982. Since then, he has been a trainer, consultant and advisor to management and audit units in fifteen major federal grant making agencies and with grantee, subgrantees and independent audit organizations located in all fifty states, the District of Columbia and 17 foreign countries. In addition, he has served recipient and independent audit organizations located throughout the United States and eight foreign countries. Among his diverse clients are governmental units, colleges and universities, nonprofit organizations, associations and professional and commercial firms.

The 2010 Grants Management Training

## Cost Principles and Allowability for Grants

Course 2 | March 10, 2010



8:30  
Continental Breakfast

9:00

### Understand Cost Applicability

- Examine the different cost principles for state, local and tribal governments; as well as universities, nonprofits and for-profit organizations
- Review the proper flow through to sub-recipients to navigate the grants cost process

### Cost Allowability

- Determine whether a cost meets the criteria of being reasonable, allocable and allowable
- Review grant application budgets to familiarize yourself with cost allowability

### Direct and Indirect Costs

- Understand the differences between direct and indirect costs in the grants process
- Classify costs as direct or indirect based upon the treatment of that cost within the accounting system

### Selected Items of Cost

- Locate cost items in the cost principles and program guidelines
- Review factors affecting grant allocability of indirect costs

### Using and Applying Cost Principles

- Review and develop your budget while adhering to grant guidelines
- Identify items and procedures in your budget that would be reviewed in a grant audit

### Tips on Cost Principles

- Gain insight into grant cost disallowances by exploring agency and court decisions
- Negotiate with vendors on budget items that are consistent with your cost principles

4:00  
Adjourn

“Many valuable tips  
and tools”

HEATHER ELLIS, ARIZONA DEPARTMENT OF HEALTH



# Audit Requirements for Grants

Course 3 | March 11, 2010

8:30  
Continental Breakfast

9:00

## Review Audit Requirements and Select Auditors

- Examine grant audits: the players, their authority and their roles
- Use requirements such as OMB Circular A-133, the Compliance Supplement and the GAO Yellow Book to establish your own audit guidelines

## Risk Assessment and Major Program Factors

- Conduct a risk assessment of your program and determine if it is high or low risk
- Analyze internal controls and compliance requirements for program success

## Conduct the Audit

- Perform audit results and findings to increase grant report accuracy
- Monitor the auditor's performance to avoid common errors

## Single Audit Reporting

- Report package contents and submission procedures with Clearinghouse
- Use Circular A-133 criteria to evaluate the adequacy of an audit reporting package

## Prepare for Your Audit

- Ensure proper documentation on time and effort reports, and financial and performance reports for your grant
- Identify all sub-recipients and develop a monitoring file that includes program performance and financial information

## Tips for Grant Managers

- Examine common audit findings and questioned costs associated with the grant award
- Ensure you understand and document your control system

4:00  
Training Adjourns

"I feel prepared to tackle all aspects of grants management."

DENNIS LEE, CHURCHILL COMMUNITY COALITION

# Exhibiting & Sponsorship

As a conference and training provider, The Performance Institute is an expert in bringing together leaders to share and discuss best practices and innovations. We connect decision-makers with respected solution providers. The Institute offers five different pre-designed sponsorship packages:

- Event Co-Sponsor
- Session Sponsor
- Luncheon Sponsor
- Exhibit Booth Sponsor

For more information on sponsorships or to get started, contact **Meredith Mason** at [Meredith.Mason@PerformanceInstitute.org](mailto:Meredith.Mason@PerformanceInstitute.org) or call 202-739-9707.

The 2010 Grants Management Training



## In-House Training

One of the more popular vehicles for accessing the Institute's educational offerings is the delivery of on-site trainings and management facilitations. Bringing a training or facilitation in-house gives you the opportunity to customize a program that addresses your exact challenges and provides a more personal learning experience, while virtually eliminating travel expenses. Whether you require training for your department or for an organization-wide initiative, the advanced learning methods employed by The Performance Institute will create an intimate training atmosphere that maximizes knowledge transfer to enhance the talent within your organization.

### CUSTOMIZATION

We realize that not all obstacles can be overcome by applying an "off-the-shelf solution". While many training providers will offer you some variation of their standard training, The Performance Institute's subject matter experts will work with you and your team to examine your programs and determine your exact areas of need. The identification of real life examples will create a learning atmosphere that resonates with participants while at the same time providing immediate return on your training investment. Using interactive exercises that employ actual projects or scenarios from your organization, instructors can address specific challenges and align the curriculum of each session to your objectives. While the majority of on-site trainings are focused on smaller groups, The Performance Institute also has the ability to accommodate organizational-wide training initiatives. Utilizing multiple instructors, The Institute has the capacity to deliver courses to groups of up to 300 participants per day.

For more information on in-house training, please contact **Blake Zach** at [Blake.Zach@PerformanceInstitute.org](mailto:Blake.Zach@PerformanceInstitute.org) or call 877-992-9521.

### AREAS OF EXPERTISE

- Strategic Planning
- Performance Measurement
- Project Management
- Lean Six Sigma
- Workforce Management
- Performance-Based Budgeting
- Performance-Based Contracting
- Performance Reporting
- Program Evaluation
- Administrative Management
- Leadership and Change



# Logistics & Registration

## VENUE & HOTEL

The **2010 Grants Management Training** will be hosted at The Performance Institute's Training Center in Arlington, VA, just one block east of the Courthouse stop on the Orange Line of the D.C. Metro. A public parking garage is located inside of the building for \$10/day. Continental breakfast and refreshments will be provided for delegates on each day.

 The Performance Institute  
1515 North Courthouse Rd., Suite 600  
Arlington, VA 22201  
703-894-0481

A limited number of rooms have been reserved at the Arlington Rosslyn Courtyard by Marriott at the prevailing rate of **\$226.00** until February 7, 2010. This rate is based on the Government Per Diem and is subject to change. Please call the hotel directly and reference code **"Grants"** when making reservations to get the discounted rate. The hotel is conveniently located three blocks from the Rosslyn Metro station. Please ask the hotel about a complimentary shuttle that is also available for your convenience.

 Arlington Rosslyn Courtyard by Marriott  
1533 Clarendon Blvd.  
Arlington, VA 22209  
Phone: 703-528-2222 / 1-800-321-2211  
<http://www.CourtyardArlingtonRosslyn.com>

Hotel and travel costs are not included in conference tuition.

## TUITION & GROUP DISCOUNTS

The tuition rates for attending **The 2010 Grants Management Training** are as follows:

	Regular Rate
Any Course	\$435
All Courses	\$999

\*For the Early Bird rate, or for more information on group discounts and rates for **The 2010 Grants Management Training** please contact **Melvin Hall** at 202-739-9630 or email him at [Melvin.Hall@PerformanceInstitute.org](mailto:Melvin.Hall@PerformanceInstitute.org)

## CPE CREDITS

Delivery Method: Group-live      Program Level: Basic  
Prerequisites: None                  Advanced Preparation: None

### CPE Credits: 6 credits per day



The Performance Institute (PI) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Nashville, TN 37219-2417. Website: [www.nasba.org](http://www.nasba.org).

### Cancellation Policy

For live events: The Performance Institute will provide a full refund less \$399 administration fee for cancellations four weeks before the event. If cancellation occurs within two weeks prior to conference start date, no refund will be issued. Registrants who fail to attend and do not cancel prior to the event will be charged the entire registration fee.

All the cancellation requests need to be made via Event or email. Your confirmation email contains links to modify or cancel registrations. Please note that the cancellation is not final until you receive a written confirmation.

Payment must be secured prior to the conference. If payment is not received by the conference start date, a method of payment must be presented at the time of registration in order to guarantee your participation at the event.

### Quality Assurance

The Performance Institute strives to provide you with the most productive and effective educational experience possible. If

after completing the course you feel there is some way we can improve, please write your comments on the evaluation form provided upon your arrival. Should you feel dissatisfied with your learning experience and wish to request a credit or refund, please submit it in writing no later than 10 business days after the end of the training to: The Performance Institute: Quality Assurance, 805 15th Street, NW, 3rd Floor, Washington, DC 20005

We will evaluate individual complaints in a context of collective comments from the event.

Note: As speakers are confirmed six months before the event, some speaker changes or topic changes may occur in the program. The Performance Institute is not responsible for speaker changes, but will work to ensure a comparable speaker is located to participate in the program.

If for any reason The Performance Institute decides to cancel this conference, The Performance Institute accepts no responsibility for covering airfare, hotel or other costs incurred by registrants, including delegates, sponsors and guests.

## REGISTRATION

1. **ONLINE** at [www.GrantsMadeEasy.org](http://www.GrantsMadeEasy.org)
2. **VIA FAX** to 866-234-0680
3. **VIA PHONE** to 877-992-9521
4. **VIA MAIL** to The Performance Institute Corporate Headquarters  
805 15th Street, NW, 3rd Floor  
Washington, DC 20005

- Yes! Register me for The 2010 Grants Management Training-All Courses  
 Register me for Course One  
 Register me for Course Two  
 Register me for Course Three

Please call me. I am interested in a special group discount for my team

### Delegate Information

Name \_\_\_\_\_ Title \_\_\_\_\_

Office \_\_\_\_\_ Organization \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Email \_\_\_\_\_

### Payment Information

- Training Form/Purchase Order       Check (accepted by mail only)  
 Credit Card   

Credit Card Number \_\_\_\_\_ Billing Zip \_\_\_\_\_ Exp. Date \_\_\_\_\_

Name on Card \_\_\_\_\_ 3-Digit Verification # \_\_\_\_\_

Please make checks payable to: The Performance Institute

Priority Code: N127-WEB

### Discounts

- All 'Early Bird' Discounts must require payment at time of registration and before the cut-off date in order to receive any discount.
- Any discounts offered whether by The Performance Institute (including team discounts) must also require payment at the time of registration.

- All discount offers cannot be combined with any other offer.
- Discounts cannot be applied retroactively

# About The

# Performance Institute

Called “the leading think tank in performance measurement for government” on OMB’s ExpectMore.gov, The Performance Institute has been a leader in Performance Management training and policy since the 2000 administration transition. As part of the Government Performance Coalition, a group of good government organizations, the Institute worked in 2000 to deliver recommendations to the then new administration on what would become the President’s Management Agenda.

In 2009, the Institute is leading Innovations in Government: From Transition to Transformation, or InnoGOV.org, a collection of forums, research and recommendations to bring insight and transformation to the federal government. The goal of InnoGOV.org is to centralize the importance of performance, accountability and transparency in government and to disseminate the leading best practices to government managers.

The Performance Institute has published several research reports regarding performance management initiatives and trains over 10,000 government managers per year on performance-based topics. Dedicated to improving citizen services and taxpayer transparency, the Institute uses a best-practices foundation to deliver the most effective and tested methodologies for improving performance.



805 15th Street, NW – 3rd Floor  
Washington, DC 20005  
[PerformanceInstitute.org](http://PerformanceInstitute.org)