



Financial Performance Reporting

June 9–10, 2010
Arlington, VA

YOU WILL LEARN TO:

Discuss the Future of Financial Reporting in Government

- Review the ongoing challenges and demands for performance driven data

Strengthen and Improve Your Existing Performance Reporting Processes

- Incorporate reporting techniques that allow for enhanced transparency and receptivity

Analyze New Dashboard Options to Further Align Your Financial Reports

- Discover how to deliver the correct kind of information using the right tools

Improve Your Performance Message with Tailored Financial Reports

- Engage your stakeholders with reports customized to meet their needs

Collect,
Validate and
Manage Your
Organization's
Performance
Information
and Data

In Association with:



Earn 12 CPE Credits

www.PerformanceInstitute.org/FPR

FINANCIAL PERFORMANCE REPORTING Agenda-at-a-Glance

REFINE YOUR CURRENT REPORTING METHODS TO ACHIEVE FASTER MORE ACCURATE RESULTS

Day One: Wednesday, June 9, 2010

8:30	Registration and Continental Breakfast
9:00	<ul style="list-style-type: none"> • Overview of Financial Performance Reporting and Financial Accountability • Understand the Importance of Accelerated Reporting in Government • Develop a Meaningful Performance Measurement and Reporting Process
12:00	Lunch and Networking Break
1:00	<ul style="list-style-type: none"> • Identify and Collect Relevant Performance Information • Interactive Application: Enhance Your Data Collection Process • Validate Your Performance Measures
4:00	Training Adjourns

Day Two: Thursday, June 10, 2010

8:30	Registration and Continental Breakfast
9:00	<ul style="list-style-type: none"> • Improve the Quality of Financial Performance Information • Understand how Financial Reporting Affects Decision Making
12:00	Lunch and Networking Break
1:00	<ul style="list-style-type: none"> • Manage Performance Data (Dashboards/Report Cards) • External Reporting: Craft a "Performance Message" to Explain Performance Achievements
4:00	Training Adjourns

WHO SHOULD ATTEND?

- Federal, State and Local Auditors
- Financial Managers
- Chief Financial Officers
- Budget Analysts
- Program Managers
- Project Managers
- Financial Analysts
- Budget Officers
- Inspectors General



8:30

Registration and Continental Breakfast

9:00

Overview of Financial Performance Reporting and Financial Accountability

- Understand the latest financial management standards in financial reporting
- Evaluate the most pressing challenges with reporting to improve your own processing framework
- Review the Performance and Accountability Report (PAR) in Accordance with CEAR™
- Examine the Sarbanes-Oxley Act and its influence on government financial reporting

Understand the Importance of Accelerated Reporting in Government

- Assess the importance of getting financial reports submitted on time
- Examine the consequences for not producing accurate and timely financial and performance reports
- Understand the future of financial reporting in government

Develop a Meaningful Performance Measurement and Reporting Process

- Evaluate the steps necessary to develop an effective reporting process
- Canvas the critical success factors for performance management
- Understand the critical success factors needed to design a successful report

12:00

Lunch Break

1:00

Identify and Collect Relevant Performance Information

- Evaluate the sources for data collection
- Identify the challenges in collecting consistent and reliable data
- Create a robust data repository for your agency

Interactive Application: Enhance Your Data Collection Process

- Understand what key questions must be answered by your data
- Examine the relationship between your objectives and that of your stakeholders
- Apply the critical steps necessary to acquire your data

Validate Your Performance Measures

- Examine the key characteristics of quality performance measures
- Develop meaningful measures for your outcomes, strategies and activities
- Evaluate your current measures for reliability, quality and relevance

4:00

Day One Adjourns



BECOME A CERTIFIED GOVERNMENT PERFORMANCE MANAGER

To ensure professional success, you must continually expand your skills and education. The bar has been raised in government agencies and organizations and many government managers are now required to receive formal certification to stay up to date on the latest trends, best practices and mandates.

To address these needs, the Institute offers a Certificate in Government Performance Management. Completing a certification program is easy. Just attend three "core" courses and an additional three "elective" courses you select based on topics that meet your agency's unique needs. Upon successful completion, you will emerge from the Institute's certification program with a thorough understanding of all course concepts—and poised to apply what you learned in a real and practical way.

ADVANCE YOUR CAREER

Education and professional certification are becoming necessary for promotion and requirements for coveted positions. In the Certified Government Performance Manager program, you will acquire the skills and tools to make you the lead performance management resource for your organization.

MEET NEW CERTIFICATION REQUIREMENTS

To hold a position as a performance manager in government you must demonstrate compliance with new skills sets required by OMB and Congress. Receiving your certificate is one key way to demonstrate your skills.

CUSTOMIZE A PROGRAM TO FIT YOUR NEEDS

Working with Institute training managers, you can select courses that will have direct application and impact to your work.

For more information about certification, please contact Melvin Hall at 202-739-9630 or email him at Melvin.Hall@PerformanceInstitute.org

8:30

Registration and Continental Breakfast

9:00

Improve the Quality of Financial Performance Information

- Mitigate financial reporting errors and payment errors
- Streamline the reporting process in order to produce quality accelerated financial reports

Understand How Financial Reporting Affects Decision Making

- Ensure financial reports are utilized for informed decision making
- Learn how to manage data to make performance reporting more effective and efficient
- Realize internal weaknesses and understand which areas need assistance

12:00

Lunch Break

1:00

Manage Performance Data (Dashboards/Report Cards)

- Learn how to effectively manage your performance data using different information systems
- Maximize strategic investments using the latest in IT governance
- Identify technological solutions to make the performance reporting process smoother

External Reporting: Craft a "Performance Message" to Explain Performance Achievements

- Determine who is the audience or key audiences for your reports
- Identify what different needs must be met for different audiences
- Assess what outcomes are required to meet the needs of your various stakeholders
- Evaluate the key components and success factors for crafting the perfect "performance message"

4:00

Day One Adjourns

In-House Training & Customization

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 organization-wide training initiatives. Utilizing multiple instructors, the Institute has the capacity to deliver courses to groups of up to 300 participants per day.

Areas of Expertise:

On-site delivery of single courses, certification programs and entire packages of specialized courses are available in the following areas:

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

For more information about in-house training and certification options, please contact Jennifer Mueller at 202- 739-9619 or email at her at jennifer.mueller@performanceinstitute.org

Sponsorship Opportunities:

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 four 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 202-739-9707 or email her at Meredith.Mason@PerformanceInstitute.org

Logistics & Tuition

Venue & Hotel:

Financial Performance Reporting will be hosted at The Performance Institute in Arlington, Virginia, just one block east of the Courthouse Metro stop on the Orange Line. A public parking garage is located just inside of the building. Continental breakfast and lunch will be provided for delegates on each day.

 ● The Performance Institute Conference Center
1515 N. Courthouse Rd., Suite 600
Arlington, VA 22201
571-970-0271

A limited number of rooms have been reserved at the Arlington Rosslyn Courtyard by Marriott at the prevailing rate of **\$226**. Please call the hotel directly and reference code **Financial Performance Reporting** 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
www.courtyardarlingtonrosslyn.com

Tuition & Group Discounts:

The tuition rate for attending **Financial Performance Reporting** is as follows:

Offerings	Early Bird	Regular Rate
Conference	\$769*	\$869

* For the Early Bird Rate, register before April 28, 2010.

For more information on group discounts for **Financial Performance Reporting** contact Melvin Hall at 202-739-9630 or email him at Melvin.Hall@PerformanceInstitute.org

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

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.

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

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.



CPE Credits:

Delivery Method: Group-live **Program Level:** Basic **Prerequisites:** None
Advanced Preparation: None **CPE Credits:** 12 for the conference, 3 for the workshop

The Performance Institute 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

Registration Form



Call

877-992-9521



Fax this Form to

866-234-0680



Visit

www.PerformanceInstitute.org/FPR

Registration Form

- Yes! Register me for **Financial Performance Reporting**
- Please call me. I am interested in a special group discount for my team

Delegate Information

Name	Title
Organization	Dept.
Address	
City	State
Zip	
Telephone	Fax
Email	

Payment Information

- Check
 Purchase Order/Training Form
 Credit Card

Credit Card Number	Expiration Date	Verification no.
Name on Card		
Billing Address		

Please make checks payable to: The Performance Institute

CANCELLATION POLICY: The Performance Institute will provide a full refund less a \$399 administration fee for cancellations requested four weeks prior to the event start date unless cancellation occurs within two weeks prior to the event start date. If a cancellation is requested less than two weeks prior to the event 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 cancellations must be requested through the cancellation link found in your attendance confirmation email. Please note that cancellation is not final until you receive a cancellation confirmation email.

- I have read and accepted the Cancellation Policy above.

ACKNOWLEDGED AND AGREED

By: _____ Date: _____

Priority Code: P770-WEB



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 2010, 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.



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