Cutting-Edge Update on Developing Performance Measures and Evaluation Strategies to Improve Effectiveness among Grantees

Evaluators, Funders and Grantees Forum

2003 Performance Measurement, Evaluation and Auditing Forum for

Grants Programs

The Performance Institute, May 7-9, 2003



Strategies for Funding Programs on:

- **Social and Human Services**
- **Non-profit "Business" Development**
- **Research**
- **Arts and Humanities**
- **Child Care**
- **Public Health**
- **Public Education**

Presented by:

The Performance Institute

Innovations in Performance Measures and Evaluation Strategies from Diverse and Model Grants Programs: Turn Accountability Standards into an Effective Tool for Ongoing Organizational Improvement

Design

Tailored Performance Measures & Evaluation Strategies for Grant Searching, Writing and Awarding

Measure

Intangible Outcomes and Cautiously Award Your Grants

Learn

Improve Grant Results by Using Performance Indicators and Outcome Measures in Grant Announcements, Proposal Budgets and Accounting Reports

Increase

Knowledge of New Audit Standards and Compliance with OMB Circulars, GAO Standards and Federal Agency Regulations

Survive

Budget Crunches While Developing Monitoring Procedures to Improve the Performance and Accountability of Your Grantees

Plus, Special Audit Workshop:

- Writing Effective Grant Proposals with an Eye toward Performance, Auditing and Evaluation Issues
- Ensure Government-Wide Compliance for Federal and Private Grant Audits

Link Grants to Results and Survive Budget Crunches

Don't Miss the Interactive Post-Conference Application Session!

This value added application workshop is designed to give you the hands on tools necessary to maximize what you are able to take away from this summit. Post-conference workshop will provide updates on:

- Complying with the legal, private and management processes for an effective and efficient audit
- Performing total risk assessments
- Increasing your capacity building power
- Developing an effective internal and external communication process for your audit

Special Post-Conference Audit Application Workshop for:

- Federal, State and Local Government Finance Officers
- Controllers
- Auditors
- Independent Public Accountants

. . . and All Those Interested in Developing a Government Practice

Dear Grant Program Managers, Finance Officers, Controllers and Auditors,

As the nation increasingly turns to government agencies and foundations to support important causes through grants, our community will be under increasing pressure to measure, evaluate and improve the results of our grant programs. To equip you with the latest practices for eliminating these challenges, you are invited to join us for the "2003 Performance Measurement, Evaluation and Auditing Forum for Grant Programs," at the Performance Institute, in Arlington, VA, May 7 - 9.

Measure and Report Outcomes

Whether you are trying to comply with new reporting requirements or to develop and communicate your own performance outcomes, you must first incorporate a framework for embedding performance measures into your grant announcements, proposals, budgets, and accounting procedures.

Utilize New Evaluation Tools

Implement best practices and leading innovations for designing evaluation criteria that will assist grantees in improving their performance as part of the evaluation process.

Enhance Accountability for Results

The "2003 Performance Measurement, Evaluation and Auditing Forum for Grant Programs," is your opportunity to improve management skills for getting the most profitable results and communicating the outcomes of private and government grants.

Augment Grantee Performance

Maximize the value of the relationship between funder and grantee through implementing best practices in designing, measuring, evaluating, and reporting on grantee performance. We have gathered together leaders in the field of evaluating and measuring performance of grants programs to give you the tools to account for grant dollars and help grantees improve their services.

Space will be limited, so register yourself and your colleagues today by calling 703-894-0481 or visit www.performanceweb.org. I look forward to meeting you this spring!

Best Regards,



Luisa Córdoba
Director of Educational Services
The Performance Institute

Apply the Latest Updates in Developing Performance Measures to Improve the Effectiveness of Your Funding Program

Day One: May 7, 2003

8:00 Registration and Continental Breakfast

8:30 Keynote: Leading Strategies in Performance & Evaluation: Innovations for Funders and Grant Program Managers

Kick-off this forum with an updated session on trends in grant performance and evaluation strategies. Whether you are a funder or a grantee, these changing times require SHARPER and more conclusive performance & reporting to ensure the continuity of the programs, and to fulfill a mission which has been stated in your proposal.

Collete Thayer, *Fannie Mae Foundation**

9:15 Leadership Panel: News, Mandates, and State-of-the-Practice for Evaluation, Performance Measurement, and Auditing in Grants Programs

- Best practices for evaluation tools and strategies
- Updates on government performance regulations
- Future directions in performance measures and outcomes for grants programs.
- Addressing capacity building and strengthening the community served

Tracey Rutnik, *Association of Baltimore Area Grantmakers (ABAG)*

Jayme Sokolow, Ph.D., *The Development Source*

10:15 Break

10:30 Comprehensive Framework for Performance Measures and Evaluation for Grants (Lessons for Funders and their Grantees)

- Develop a framework for measuring the performance of grants programs: Designing, implementing and effectively using performance indicators
- Master best practices in performance measurements from leading programs, grants and partnerships
- Utilize logic modeling: Linking end outcomes to specific grant program activities

Carl DeMaio, *The Performance Institute/Reason Foundation*

11:45 Networking Luncheon

Performance Measurement and Critical Success Factors

12:45 Designing Performance Measures for Inclusion in RFP´s and/or Grant Applications

Get an experienced view of the RFP process, the anatomy of a typical outcome-based RFP and its activities.

Learn How to:

- Design performance measures as part of the RFP
- Educate potential grantees of the role of performance measures in tracking outcomes and improving service
- Develop RFP's to measure appropriate outcomes
- Communicate how to measure appropriate outcomes

Kathleen Kendrick, *Agency for Healthcare Research and Quality AHRQ, Department of Health and Human Services*

1:30 Assisting Grantees with Implementing Effective Performance Measures

- Best practices for helping grantees establish effective performance measures
- How grantees can link performance measures and outcomes to budgeting and staffing processes
- Measuring, evaluating, and realigning: Making performance measurement and evaluation part of everyday functioning and improvement

Jayme Sokolow, Ph.D., *The Development Source*

2:30 Break

2:45 Writing Effective Grant Proposals with an Eye toward Performance, Auditing and Evaluation Issues

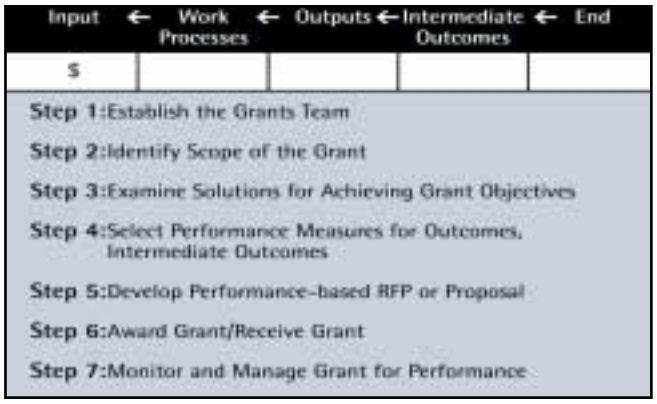
Writing a performance-based proposal involves a strategic process of planning and of research, outreach, and cultivation of potential grantors or gift donors.

Examine grant proposal examples and engage in facilitated exercises that will help you build skills for proposal writing.

- Understand the components of a performance-based proposal
- Evaluate your strategic program needs
- Identify key components of a proposal
- Gain tips for making your proposal more relevant, concise, and informative

Jeffrey Lischin, *Community Consulting Services*

4:45 Adjourn



Day Two: May 8, 2003

8:00 Continental Breakfast

Evaluation Strategies

8:30 Making Evaluation Part of the Application Process

- Best practices for helping grantees establish effective performance measures for the type of evaluation process more agreeable with their programs
- How grantees can link performance measures and outcomes to budgeting and staffing processes
- Measuring, evaluating, and realigning: Making performance measurement and evaluation part of everyday functioning and improvement

Blanca Rodriguez, *Grants Policy and Oversight, U.S. Department of Education*

9:30 Evaluation Revisited: Using Third Party Evaluators to Assess Grantee Performance

- Develop a value added approach to using third party evaluators
- Balance the need for an expert evaluator with the need to incorporate evaluation Into capacity building for grantees
- Best practices for getting input from all of your stakeholders during the evaluation process
- Choosing the right evaluator for your needs

Bianca Norris, *Grants Coordinator, ASPH**

10:30 Break

10:45 Hard-to-Measure Outcomes: Addressing Capacity Building and Strengthening the Community Served

The contemporary view of capacity building goes beyond the conventional perception of fulfilling the operative mission in an effective manner. The central concerns of grant programs management; to manage change, resolve conflict, manage institutional pluralism, enhance coordination, foster communication, and ensure that data and information are shared. All concerns require a broad and holistic view of capacity development. This definition covers both institutional and community-based capacity building.

Tracey Rutnik, *Association of Baltimore Area Grantmakers (ABAG)*

Join this facilitated discussion on how to ensure:

- Your outcomes aid in the building of organizational capacity
- Understanding of the role evaluation plays in organizational capacity building
- Funders work with grantees to use evaluation as an ongoing management tool

11:45 Networking Luncheon

*Denotes Invited

1:00 Designing and Implementing Performance Measurements and Evaluation Strategies Using the "Logic Model" Approach

Case Studies from: Public Health, Social Services and Research Grants Mission Areas

- Identify stakeholders for grants programs
- Identify strategic goals, objectives and performance measures at the funder's level
- Cascade goals, objectives and performance measures to the grantee's level
- Articulate and include the performance measures in RFP's, budget & reporting formats, and the close out process

Carl DeMaio, *The Performance Institute/Reason Foundation*

4:15 Adjourn

Day Three: May 9, 2003

Post-Conference Workshop for Grant Recipients:

8:00 Continental Breakfast

8:30 Best Practices and Lessons Learned in Preparing for an Audit

This comprehensive workshop guides you through all the steps recipients and grantors must follow to ensure government-wide compliance for federal and private grants audits. From submitting grant proposals to setting up financial risk assessments for payment and reporting and the final audit itself, this workshop covers every stage of the grants auditing and reporting cycle.

If you are covered by:

- OMB´s Circular A-110 (Uniform Administrative Requirements for Grants and Cooperative Agreements with Institutions of Higher Education, Hospitals and Other Nonprofit Organizations)
- OMB´s Circular A-133 (Audits of States, Local Governments, and Non-Profit Organizations)

If your funding is provided by:

- a small private fund
- an organization providing grants in a particular subject area
- a national foundation

Olga Polemitou, *Aristion Consulting*

12:00 Adjourn

10 Benefits of Attending :

1. Acquire Best Practice Strategies for Managing Your Grants to Improve Service Outcomes
2. Improve Planning toward the Improvement of Your Organization's Granting Efforts
3. Develop Strategic Evaluation Frameworks that Enhance Grantees Organizational Effectiveness and Ability to Change
4. Incorporate Lessons Learned in Performance Measures for a Multitude of Service Issues and Outcomes
5. Improve Your Ability to Provide Critical Information to Policymakers and to Better Target Scarce Resources
6. Implement Leading Best Practices to Link Resources to Results in Grant Applications, Proposals, Budgets, Evaluations, and Performance Reports
7. Prepare for the Increased Focus on Accountability and Performance in Public Health, Social Service, Community Development and Research Programs
8. Master the Use of Performance Indicators and Evaluation Strategies to Improve Grant Results
9. Incorporate Practical Models, Tools, and Tips, for Developing Performance Measures for Your Programs
10. Enhance Your Ability to Clarify and Communicate Your Performance Expectations and Accomplishments

Who Will Attend?

- Grant Makers
- Grant Monitors
- Program Administrators
- Grant Writers
- Evaluators
- Foundation and Corporate Giving Program Administrators
- Federal, State, and Local Health, Social Service, and Research Agencies
- Trustees Interested in Improving Evaluation and Performance
- Executive Directors and CEOs
- Community Foundation Administrators
- Community-Based Development Organizations (CBDOs)
- Community Development Corporations

And anyone who is involved with the granting, receiving, administrating, auditing, or evaluating of private or public grants for:

- Housing and homelessness
- Business development
- Law enforcement and juvenile justice
- Environmental programs
- Arts programs
- Services for the elderly
- Child care and social services
- Non-profit communications
- Public health

Free Subscription to Institute Research:
The Performance Institute serves as the nation's leading repository of thoroughly researched, documented, catalogued and peer-reviewed "best practices" in a multitude of issue areas. Each month, the Institute publishes its research through a variety of e-mail publications. To subscribe to the Institute's newsletter on performance measurements, send and e-mail to Performance@Peformanceweb.org. For more information on Institute programs and services, visit us on the Internet at www.PerformanceWeb.org.

Exhibiting and Sponsorship Information:
To learn more about sponsorship opportunities at The Performance Institute and customized in-house training sessions or other educational seminars and conferences, please contact James Simpson at 703-894-0481 or Simpson@PerformanceWeb.org.

Hotel Information:
The "2003 Performance Measurement, Evaluation and Auditing Forum for Grant Programs" will be held at The Performance Institute in Arlington, VA. A limited number of rooms have been reserved for you at the Hilton Gardens Hotel. Please contact the hotel at 1-703-528-4444 and be sure to ask for the Performance Institute discount rate of $142 per night. The Hilton Gardens Hotel will ensure that your conference experience is not only educational but also comfortable and enjoyable in every aspect. For additional information on accommodations and area attractions, please visit the hotel's website at www.hilton.com

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Arlington, VA 22201
Tel: 1-703-528-4444
Fax: 1-703-528-4933

Tuition Rates:
Fees for attendance at "2003 Performance Measures, Evaluation and Auditing Forum for Grant Programs" are as follows:

Forum Only:	$995
Forum AND post-conference workshop	$1295

Group discounts are available. Contact James Simpson regarding group rates to the "2003 Performance Measurement, Evaluation and Auditing Forum for Grant Programs" at Simpson@PerformanceWeb.org.

*Administrative Note: A 10% cancellation fee on registration will be charged for cancellations received less than three weeks from the date of the conference. As speakers are confirmed 6 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.

Rave Reviews from Last Year's Forum:

"The speakers and the information were excellent throughout the entire conference."
— Margaret McKain, Stanislaus County Community Services Agency

"One of the best in the area of outcomes and performance measures. Directly related to my job, using clear program examples."
— Kim Jennings, U.S. Environmental Protection Agency

"Wow! Great information in very good presentations. I got my money's worth for the whole conference the first day."
— Dan Cook, Avera Health



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Arlington, Virginia 22201

2003 Performance Measurement, Evaluation and Auditing Forum for Grant Programs

Call (703) 894-0481, Fax This Form To (703) 894-0482 or visit www.PerformanceWeb.org

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