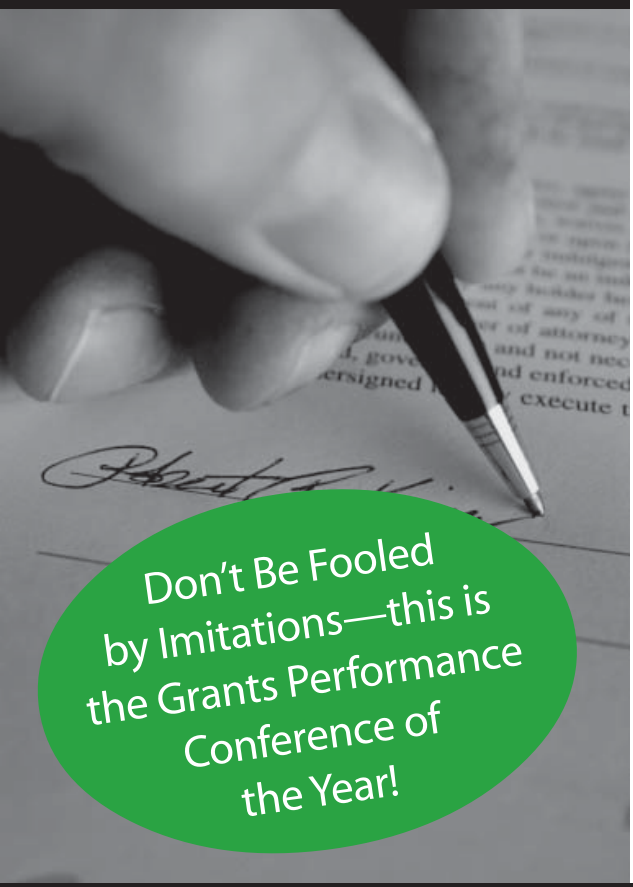
Master the Use of Performance Measures to Improve the Results of Grants Programs!

2005 National Conference on

Performance-Based Grants Management

Integrating Performance Measures to Strengthen and Streamline Your Grant Management Strategies

February 1-3, 2005
Washington, DC
Washington Plaza Hotel



Don't Be Fooled by Imitations—this is the Grants Performance Conference of the Year!

Measure & Report Outcomes
Develop performance measures to track the effectiveness of your grant programs

Meet Evaluation Standards & Accountability Mandates
Design evaluation criteria to assist grantees in measuring their program's performance and meet the requirements of the Program Assessment Rating Tool

Assess "Cause-Effect" Between Grant Program Activities & Outcomes
Align performance measures to both your grant programs and your agency's mission

Improve Reliability of Grant Data Reporting
Establish clear performance measures across grantees to ensure data quality and validity

Presented by: The Performance Institute

In Association with: A.A.G.P.™ American Association of Grant Professionals

Receive CPE Credits and Stay on Top of the Latest Government Performance Mandates

Meet New Grants Performance Criteria from Congress and OMB

Effectively Manage and Evaluate the Performance of Your Grants

Ten Key Benefits of Attending This Conference:

1. **Acquire** best practice strategies for managing your grants to improve service outcomes
2. **Develop** strategic indicators and evaluation frameworks that enhance grantees organizational effectiveness and ability to change
3. **Incorporate** lessons learned in performance measures for a multitude of service issues and outcomes
4. **Implement** leading best practices to link resources to results in grant applications, proposals, budgets, evaluations, and performance reports
5. **Master** the use of performance indicators and evaluation strategies to improve grant results
6. **Align** Performance Measures with your Agency's Mission and Goals
7. **Manage** Your Grants to Improve Program Outcomes
8. **Comply** with the Requirements of the Program Assessment Rating Tool (PART)
9. **Establish** Performance Measures to Improve Grantee Effectiveness
10. **Link** Outcomes to Specific Program Activities to Ensure Results

Dear Grant Program Manager,

As we move closer to a fully results-oriented management system in government, grant making agencies and non-profit organizations must insure their grantees meet specific performance standards in order to continue qualifying for federal, state and private financial assistance.

To equip you with the latest practices for meeting this challenge, you are invited to join us for the ***2005 National Conference on Performance-Based Grants Management*** on February 1-3, 2005 in Washington, DC.

Measure and Report Outcomes

This training will provide grant managers with the skills necessary to design and award grants that are performance-based in their origin and incorporate evaluation and reporting strategies within their structure. Through the use of the Government Performance Logic Model framework, both managers and recipients will be able to focus on developing performance goals, timelines and resource allocation strategies specific to each grant or program.

Utilize New Evaluation Tools

You will learn to 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 Grantee Accountability for Results

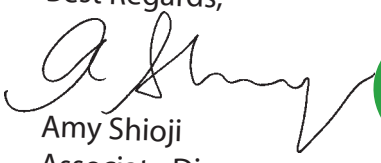
This event is your opportunity to improve management skills to get the most profitable results. Through the incorporation of outcome-oriented performance measures, managers will be able to communicate, monitor and enforce the compliance requirements that will guarantee a successful closing or extension of the grant.

Augment Grantee Performance

Maximize the value of the relationship between funder and grantee through the incorporation of 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 provide you with 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 us on-line at www.PerformanceWeb.org. *I look forward to seeing you in February!*

Best Regards,



Amy Shioji
Associate Director
The Performance Institute

PLUS: Application Workshop: A Step-by-Step Case Study on Developing Performance-Based Grants!

Measuring and Improving Grant Programs:

Featuring Who's Who of Speakers

- **Carl DeMaio,** President, The Performance Institute
- **Walter Sachs,** Assistant Staff Director, Contract Operations (ASCO), Florida Department of Children and Families
- **Veena Pankaj,** Evaluation Specialist, Innonet, Inc.
- **Jayme Sokolow,** President, The Development Source
- **Gail Vertz,** Executive Director, American Association of Grant Professionals
- **Mark Turner,** President, Optimal Solutions Group, LLC
- **Jeffrey Lischin,** Director, Consulting Services
- **Diane Peal,** Vice President, Community Information and Outcome Manager, United Way of Greater St. Louis
- **Dr. Price Connor,** Scientific Review Administrator, Center for Disease Control, National Institute for Occupational Safety and Health (NIOSH)
- **Dr. Adele Childress,** NIOSH Program Administrator, Center for Disease Control, NIOSH
- **Bill Bethel,** Branch Chief, Grants Management & Reporting, The Office of Budget and Planning, Office of CFO, The District of Columbia*

& many more!

To resister, visit the Performance Institute's website at www.PerformanceWeb.org

Day One: February 1, 2005

8:30 **Registration & Continental Breakfast**

9:00 **Overview of Federal Grants Management, Circulars and Regulations**

- Understand applicable legislation and compliance issues
- Discuss the pros and cons of developing and implementing performance measures to evaluate grant program success

*David Zavada, Chief of Financial Standards and Grants Branch, Office of Management and Budget**

9:45 **Trends and Methodologies for Performance-Based Grants Management and Evaluation**

- Understand emerging accountability and transparency issues in grants management
- Incorporate performance measures in your awarding strategy for managing, tracking and evaluating

Jayme Sokolow, PhD., President, The Development Source

10:30 **Break & Refreshments**

The Ten-Step Approach to Grants Performance Management

10: 45 **Step One: Comprehensive Framework for Performance Measures and Evaluation for Grants: Lessons for Funders and Their Grantees**

- Develop a framework for measuring grant program performance
- Utilize logic modeling to link end-outcomes to specific grant program activities

Carl DeMaio, President, The Performance Institute

The Government Performance Logic Model™

Input ←	Work Processes ←	Outputs ←	Intermediate Outcomes ←	End
$				

Step 1: Establish the Grants Team
Step 2: Identify Scope of the Grant
Step 3: Examine Solutions for Achieving Grant Objectives
Step 4: Select Performance Measures for Outcomes
Step 5: Develop Performance-Based RFP or Proposal
Step 6: Award Grant/Receive Grant
Step 7: Monitor and Manage Grant for Performance

12:00 **Networking Luncheon**

1:15 **Step Two: Establishing & Training a PBGM Team**

- Identify all stakeholders for grants programs
- Align individuals' responsibilities to the project's mission

Gail Vertz, Executive Director, American Association of Grant Professionals

2:15 **Break & Refreshments**

2:30 **Step Three: Streamlining the Grant's Terms and Conditions to Focus on Results**

- Benchmark the purpose, objective and projected outcome of a grant, and advertise the available assistance in required media
- Determine the key components of each grant

Jeffrey Lischin, Director, Consulting Services

3:30 **Step Four: Designing Performance Measures and Including Them in RFP's and/or Grant Applications**

- Design performance measures as part of the RFP and educate potential grantees of the role of performance measures
- Develop RFP's to measure appropriate outcomes

Gail Vertz, Executive Director, American Association of Grant Professionals

4:30 **Adjourn**

Don't Miss This Timely Conference for Both Grantees and Their Funders!

Strategies for Funders and Grantees

Day Two: February 2, 2005

8:30 **Continental Breakfast**

9:00 **Step Five: Optimize the Solicitation, Review and Award Processes**

- Streamline the solicitation and award criteria
- Conduct efficient and productive market-sector research

Dr. Price Connor, Scientific Review Administrator, Center for Disease Control, National Institute for Occupational Safety and Health (NIOSH)

Dr. Adele Childress, NIOSH Program Administrator, Center for Disease Control, NIOSH

10:00 **Step Six: Selecting the Right Grantee Using Performance Criteria**

- Evaluate past grantee performance
- Determine the "best value"
- Assess potential conflicts of interest

Bill Bethel, Branch Chief, Grants Management & Reporting, The Office of Budget and Planning, Office of the CFO, The District of Columbia

11:00 **Break & Refreshments**

11:15 **Step Seven: Evaluating the Progress of Your Grantee**

- Determine the type of follow-up required
- Assess the grantee's operational and financial capacity to overcome performance obstacles, take corrective action and report progress

Diane Peal, Vice President, Community Information and Outcome Manager, United Way of Greater St. Louis

12:00 **Networking Luncheon**

1:00 **Step Eight: Assisting Grantees with Implementing Effective Performance Measures**

- Link performance measures to budgeting & staffing
- Make performance measurement and evaluation part of everyday functioning and improvement.

Veena Pankaj, Evaluation Specialist, Innonet, Inc.

2:00 **Break & Refreshments**

2:15 **Step Nine: Using External 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

Mark Turner, President, Optimal Solutions Group, LLC.

3:15 **Step Ten: Post-Award Monitoring, Oversight and Review**

- Determine whether positive changes have been demonstrated
- Devise clear measures of performance and accountability

Gail Vertz, Executive Director, American Association of Grant Professionals

4:15 **Conference Adjourns**

Day Three: February 3, 2005

8:30 **Workshop Registration & Continental Breakfast**

9:00 **Application Workshop: A Step-by-Step Case Study on Developing Performance Based Grants**

Walter Sachs, Contract Operations, Florida State Department of Children & Family Services

Walter Sachs is the Assistant Staff Director for Contract operations at Florida's Department of Children and Family Services. His responsibilities include: providing direct technical assistance and direct training support to operational contract administration units throughout the State of Florida; processing solicitation and contract documents for central office contracts; and, developing research and training curriculum related to social services contracting activities.

Mr. Sachs has worked with the Department of Children and Family Services for over 15 years in various positions related to contracting activities.

3:00 **Workshop Adjourns**

This workshop will provide a comprehensive, step-by-step guide to implementing effective performance measures to ensure the success of your grant programs. This value-added workshop is designed to give you the hands on tools necessary to maximize what you are able to take away from this conference.

Participants will learn:

A Step-by-Step Framework for Improving Grant Management to:

- Strengthen and streamline your grant-management strategies
- Link performance measures to grant program activities and your agency's mission and goals
- Incorporate evaluation indicators to measure and monitor the effectiveness of your grant program
- Identify your grant program's specific results

Rave Reviews from Past Conferences:

"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

Implement Best Practices to Link Resources to Results

Who Should Attend?

- ✔ Federal, State, and Local Government Grant Managers
- ✔ Program Administrators
- ✔ Grant Writers
- ✔ Evaluators
- ✔ Program Analysts
- ✔ Foundation and Corporate Giving Program Administrators
- ✔ Trustees Interested in Improving Evaluation and Performance
- ✔ Executive Directors and CEOs

Innovations in Performance Measures and Evaluation Strategies from Diverse and Model Grants Programs

- **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**—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

Why Performance-Based Grants?

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 your grant programs. Performance management is an important tool for your grant programs to ensure clearly defined outcomes and accountability.

Leave this conference with an update on the trends in grant performance and evaluation strategies. Whether you are a funder or a grantee, these changing times require sharper and more conclusive performance and reporting to ensure the continuity of the programs, and to fulfill a mission which has been stated in your proposal.

Hotel and Venue:



2005 National Conference on Performance-Based Grants Management will be hosted at the Washington Plaza Hotel in Washington D.C. Continental breakfast and a catered lunch will be provided for delegates on each day.

Washington Plaza Hotel
10 Thomas Circle, NW
Washington, DC 20005
202-842-1300
www.washingtonplazahotel.com

A limited number of rooms have been reserved at a discounted rate of $153 at the Washington Plaza Hotel in Washington D.C. Please contact the hotel directly at 202-842-1300 or 1-800-424-1140 by January 10, 2005, to make reservations. Be sure to ask for the Performance Institute conference rate, reference number 4163.

Tuition and Group Discounts:

The fee for attending ***2005 National Conference on Performance-Based Grants Management*** is $895 and $500 for the full-day workshop. Register by calling 703-894-0481 or visit us online at **www.PerformanceWeb.org**. Reduced tuition rates for delegates who attend in groups of three or more are also available by calling Nick Grasso at 703-894-0481 or grasso@PerformanceWeb.org.

Cancellations and 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: Chris DeMaio, Chief Operating Officer, The Performance Institute, 1515 N. Courthouse Road, Suite 600, Arlington, VA 22201 (phone: 703-894-0481). We will evaluate individual complaints in a context of collective comments from the event. **Note:** A $150 service fee will be charged on cancellations received less than three weeks from the date of the event. A credit memo will also be sent reflective of that amount, which can be used for a future Performance Institute conference. 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.

Receive 12.5 CPE Credits!

CPE Credit:

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Delivery Method: Group-live
Program Level: Intermediate
Prerequisites: None
Advanced Preparation: None
CPE Credits: 12.5

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Presented by: The Performance Institute

February 1-3, 2005
Washington, DC

www.PerformanceWeb.org

The Performance Institute
1515 N. Courthouse Rd. Suite 600
Washington, DC 22201

Meet new grants performance criteria from Congress and OMB!

Registration Form for the 2005 National Conference on *Performance-Based Grants Management*

Call 703-894-0481; Fax this Form to 703-894-0482;
Or visit www.PerformanceWeb.org

☐ **Yes!** Register me for the Conference Only.
☐ **Yes!** Register me for the Conference and Workshop.
☐ **Please call me.** I am interested in a group discount.

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