

2010 Financial and Grants Management Institute
Agenda-At-A-Glance

TIME	DESCRIPTION	PRESENTER(S)	ROOM
SUNDAY, NOVEMBER 14, 2010			
5:00 PM – 7:00 PM	Registration Open: 1st Floor Lobby Area (behind elevators)		
MONDAY, NOVEMBER 15, 2010			
7:00 AM – 12:00 PM	Registration Open: 1st Floor Lobby Area (behind elevators)		
Block A – 2 sessions offered concurrently			
8:15 AM – 9:45 AM	Special Grantee Meetings		
	A1: Nonprofit Capacity Building (NCB) Grantee Meeting	Bonnie Janicki La Juan Bright Gina Fulbright-Powell	Cord
	A2: Social Innovation Fund (SIF) Grantee Meeting	Peg Rosenberry Doug Lees	Pierce/Arrow
9:45 AM – 10:00 AM	Break		
Block B – 4 sessions offered concurrently			
10:00 AM – 11:45 AM	B1: Immersion Session: Financial and Grants Management 101 – Part 1	Kris Tecce	Bugatti/Royal
	B2: Immersion Session: Financial and Grants Management 101 – Part 1	Corland Forrester	Desoto A & B
	B3: Immersion Session: Financial and Grants Management 101 – Part 1	Susan Meche	Stanley/Steamer
	B4: Immersion Session: Financial and Grants Management 101 – Part 1 – SIF & NCB only	Bonnie Janicki	Pierce/Arrow
11:45 AM – 12:00 PM	Break		
12:00 PM – 12:15	Official Welcome and Opening Session		Grand Ballroom
12:15 PM – 1:45 PM	Lunch and Plenary: Learn how Michigan national service programs “get things done.”		Grand Ballroom
1:45 PM – 2:00 PM	Break		
Block C – 9 sessions offered concurrently			
2:00 PM – 3:30 PM	C1: Immersion Session: 101 Session continued – Part 2	Kris Tecce	Bugatti/Royal
	C2: Immersion Session: 101 Session continued – Part 2	Corland Forrester	Desoto A & B
	C3: Immersion Session: 101 Session continued – Part 2	Susan Meche	Stanley/Steamer
	C4: Immersion Session: 101 Session continued – Part 2 – SIF & NCB only	Bonnie Janicki	Pierce/Arrow
	C5: Avoiding Common Issues and Pitfalls	Mike Kenefick Claire Moreno	Regency A & B

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TIME	DESCRIPTION	PRESENTER(S)	ROOM
	C6: Developing and Managing Your Budget	Doug Godesky Kelly Mitchell-Baynes	Regency G, H & I
	C7: Match: Documenting Cash and In-Kind	Peg Rosenberry Doug Lees	Regency J & K
	C8: Member Records, Files, and Documentation	Mimi Morris Homero Perez Susan Rice	Regency C & D
	C9: OIG: Safeguarding & Accountability of Corporation and Recovery Act Funds	Ron Huritz	Cord
3:30 PM – 3:45 PM	Break		
<i>Block D – 7 sessions offered concurrently</i>			
3:45 PM – 5:15 PM	D1: Avoiding Common Issues and Pitfalls	Mike Kenefick	Regency A & B
	D2: Avoiding Common Issues and Pitfalls	Peg Rosenberry	Regency J & K
	D3: Financial Monitoring	Mimi Morris Susan Rice	Regency C & D
	D4: Financial Monitoring	Kris Tecce	Bugatti/Royal
	D5: Match: Documenting Cash and In-Kind	Susan Meche Doug Lees	Stanley/Steamer
	D6: National Service Criminal History Background Checks	Doug Godesky	Regency G, H & I
	D7: Understanding Financial Statements and OMB A-133 Audits including ARRA Requirements	Corland Forrester	Desoto A & B

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TIME	DESCRIPTION	PRESENTER(S)	ROOM
TUESDAY, NOVEMBER 16, 2010			
7:00 AM – 8:15 AM	Activity Breakfast		Grand Ballroom
<i>Block E – Peer Focus Session: 2 sessions offered concurrently</i>			
8:30 AM – 11:45 AM	<p>Peer Focus Session: 3 Rounds of 45 minutes talking with peers about the topics below. Participants will divide into two groups: (1) Legal Applicants (staff from State Commissions, National Programs, SIF, NCB, Tribes, and Territories); and (2) Subgrantees (staff from State Programs, National Programs, and Education Awards Programs)</p> <p>Audit Resolution</p> <p>Closing Out Your CNCS Grants (2 tables)</p> <p>Developing an Overall Financial and Grants Compliance Training Strategy (2 tables)</p> <p>Do Your Member Files Tell a Consistent "Story"? (2 tables)</p> <p>Engaging Board Members</p> <p>Fundraising and Cost Cutting Strategies in an Economic Downturn</p> <p>In-Kind Match: Tapping Possible Resources</p> <p>National Service Criminal History Checks</p> <p>Policies & Procedures (2 tables)</p> <p>Pre-Award and Post-Award Risk Assessments</p> <p>Timekeeping Under Federal Grants – Staff and Members (2 tables)</p>		Great Lakes Center
11:45 AM – 12:00 PM	Break		
12:00 PM – 1:45 PM	Lunch and Plenary: Hear from the Office of Inspector General and the Office of Grants Management about the audit process, preparing for an audit, and common audit findings.		Grand Ballroom
1:45 PM – 2:00 PM	Break		

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Block F – 8 sessions offered concurrently			
2:00 PM – 3:30 PM	F1: Federal Financial Report and Program Income	Bonnie Janicki Kelly Mitchell-Baynes	Regency C & D
	F2: Federal Financial Report and Program Income	Kris Tecce	Regency A & B
	F3: Financial Monitoring	Mimi Morris Susan Rice	Stanley/Steamer
	F4: Financial Monitoring	Mike Kenefick	Bugatti/Royal
	F5: Match: Documenting Cash and In-Kind	Susan Meche Doug Lees	Pierce/Arrow
	F6: National Service Criminal History Background Checks	Doug Godesky	Stearns/Knight
	F7: OIG: Safeguarding & Accountability of Corporation and Recovery Act Funds	Ron Huritz	Regency J & K
	F8: Understanding Financial Statements and OMB A-133 Audits including ARRA Requirements	Corland Forrester	Regency G, H & I
3:30 PM – 3:45 PM	Break		
Block G – 7 sessions offered concurrently			
3:45 PM – 5:15 PM	G1: Avoiding Common Issues and Pitfalls	Mike Kenefick Claire Moreno	Bugatti/Royal
	G2: Developing and Managing Your Budget	Doug Godesky Kelly Mitchell-Baynes	Stearns/Knight
	G3: Federal Financial Report and Program Income	Bonnie Janicki	Regency C & D
	G4: Member Records, Files, and Documentation	Mimi Morris Homer Perez Susan Rice	Stanley/Steamer
	G5: Programmatic and Fiscal Compliance as a Team Effort	Kris Tecce La Juan Bright	Regency A & B
	G6: Programmatic and Fiscal Compliance as a Team Effort	Corland Forrester	Regency G, H & I
	G7: Strengthening Internal Controls	Doug Lees	Pierce/Arrow

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WEDNESDAY, NOVEMBER 17, 2010			
7:00 AM – 8:15 AM	Activity Breakfast		Grand Ballroom
Block H – Round Robin Session			
8:30 AM – 11:45 AM	Round Robin Session: 3 Rounds of 45 minutes – 15 minutes of presentation and 30 minutes of Questions and Answers		Great Lakes Center and Regency Rooms
	Allowable Costs: OMB Circular Criteria for Cost Allowability		
	Budget Changes and Amendments		
	Changes in the IRS Form 990 Report		
	Cost Allocation Plans: Allocating Indirect and Overhead Costs (2 tables)		
	Federal Financial Reports and Program Income (2 tables)		
	Financial Accounting Software for Non-Profit Organizations		
	Fixed Amount Grants		
	In-Kind Documentation and Valuation (2 tables)		
	Living Allowance Distributions: AmeriCorps (2 tables)		
	Monitoring Subgrantees for National Service Criminal History Check Compliance		
	OIG Audit Red Flags		
	Securing or Updating an Indirect Cost Rate Agreement with CNCS		
	The Resource Center: Financial and Grants Management Resources		
Timesheets: A review of an example and OMB Requirements			
11:45 AM – 12:00 PM	Break		
12:00 PM – 1:30 PM	Lunch and Plenary: Hear from AmeriCorps Leadership about AmeriCorps and CNCS current events.		Grand Ballroom
1:30 PM – 1:45 PM	Break		
Block I – 4 Sessions offered concurrently			
1:45 PM – 3:15 PM	I1: Ask the Experts: Grants Officer, OIG Auditor, and MBI Trainer	CNCS, OIG, MBI	Pierce/Arrow
	I2: CNCS Follow-up Meeting with SIF and NCB Grantee Staff	CNCS Staff	Bugatti/Royal
	I3: CNCS Meeting with State Commissions and National Grantee Staff	CNCS Staff	Great Lakes A
	I4: Specific State Commission Meeting with Subgrantees	State Commissions	Stanley/Steamer

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TIME	DESCRIPTION	PRESENTER(S)	ROOM
3:15 PM – 3:30 PM	Break		
<i>Block J – 2 Sessions offered concurrently</i>			
3:30 PM – 5:15 PM	J1: Ask the Experts: Grants Officer, OIG Auditor, and MBI Trainer	CNCS, OIG, MBI	Pierce/Arrow
	J2: Specific State Commission Meeting with Subgrantees	State Commissions	Stanley/Steamer