

**ATTEND OUR  
DAY 3 WORKSHOP**  
to Gain Successful  
Project Management  
Strategies and Maximize  
Performance Results!

# FEDERAL FINANCIAL MANAGEMENT FORUM

**RECEIVE UP TO  
18 CPE CREDITS!**

November 3-5, 2010  
Arlington, VA

*Leverage New Financial Management Strategies to  
Address Current Budgetary Constraints*

**LINK PERFORMANCE TO FINANCIAL ACCOUNTABILITY**

Define financial performance measures that benefit your strategic planning objectives

**DEVELOP AN EFFICIENT AND RELIABLE FINANCIAL MANAGEMENT SYSTEM**

Create a system that will reduce your risks and increase your overall success rates

**APPLY LESSONS LEARNED FROM THE RECOVERY ACT**

Discover the achievements made by the financial community under the Recovery implementation stages

**FIND SOLUTIONS TO THE CHALLENGES IMPOSED BY CONTINUING RESOLUTION (CR)**

Design techniques that can help you and your team combat problems that arise due to CR

Achieve Your  
Agency's High  
Priority Goals  
with Leaner  
Fiscal Policies

In Association with:

**8:30**

Conference Registration and Continental Breakfast

**9:00**

KEYNOTE ADDRESS: Understand the New Challenges in Federal Financial Management

Doing more with less is a growing mantra across government. Today's tighter budgets require government managers to focus heavily on measuring performance outcomes and monitoring program efficiency. The greater involvement of federal financial managers is also required to further such performance management reforms. Various agencies still suffer from deficiencies in internal controls systems and a loss of tax dollars through improper payments — thus the need for innovative business approaches and financial management practices within government is absolutely necessary.

Join us for this keynote presentation to:

- Understand new OMB guidelines and initiatives
- Discuss the evolution of financial management in the federal government
- Outline the key success factors that must be in place to create a leading financial operation
- Review the long term fiscal outlook facing government agencies

**10:00**

Break and Refreshments

**10:15**

The Transparency Initiative: Lessons Learned from the American Recovery and Reinvestment Act

- Discuss the impact of the Recovery Act on the financial management community
- Understand transparency requirements within the Recovery Act
- Analyze the new data collection systems enacted to track Recovery Act dollars

MICHAEL WOOD, Director, Recovery.gov

**11:15**

Maximize Results: Integrating Financial Management with Your Strategic Planning Process

- Learn to link financial management performance measures to your strategic planning efforts
- Develop strategies to ensure those in the financial department feel connected to the overall agency mission and goals

JON DESEMBERG, Consulting Director,  
The Performance Institute

**12:15**

Lunch & Networking Break

**1:15**

Design an Effective Modern Financial Management System

- Determine which solutions can be integrated across other agencies
- Review options that can benefit your agency's financial tracking systems
- Implement project management steps that will be timely, reflective and cost effective

**2:45**

Break and Refreshments

**3:00**

Improve Your Data Quality & Measure the Performance of Your Financial Management System

- Learn to utilize performance data to project revenue needs in times of budget cuts
- Find successful strategies to help interpret data performance information
- Discuss what measures should be in place to ensure performance management within all financial operations

**4:30**

Day One Adjourns

8:30

Conference Registration and Continental Breakfast

9:00

KEYNOTE ADDRESS: Effectively Manage the Continuing Resolution Process

Each year, agencies are forced to work around the challenges imposed by Continuing Resolution (CR). CR can affect future planning, staffing issues and overall financial management processes. Additionally, this ambiguous status oftentimes puts more pressure on government managers as they must continue to achieve daily requirements.

During this keynote, you will:

- Learn to manage CR-related problems and roadblocks
- Create a plan that anticipates CR issues
- Identify ways to better administer resources and long terms projects under CR

ANTHONY P. SCARDINO, Chief Financial Officer,  
U.S. Patent and Trademark Office, Department of Commerce

10:00

Break and Refreshments

10:15

Risk Assessment: Effectively Evaluate Your Overall Financial Risks

- Evaluate the tools needed to effectively monitor your assets and avoid wasteful spending
- Adequately outline your potential risks and design strategies for avoiding these potential challenges
- Examine best practices in asset management

11:15

Eliminate Improper Payments in Your Organization

- Evaluate successful implementation strategies found in leading agencies
- Design effective plans to eliminate unnecessary spending and improper payments
- Learn to prioritize spending and necessary program objectives

12:15

Lunch & Networking Break

Continued on Page 4...

5 REASONS TO ATTEND:

- 1 Learn how to Manage the Complex Federal Financial Management Guidelines
- 2 Discover how to Navigate the Challenges Related to Continuing Resolution
- 3 Work to Improve the Deficiencies in Your Current Internal Controls System
- 4 Evaluate the Latest Tools and Techniques for Curbing Improper Payments
- 5 Examine the Long Term Objectives of the Federal Financial Community

WHO SHOULD ATTEND:

- Financial Analysts
- Financial Managers
- Chief Financial Officers
- Financial Auditors
- Accountants
- Budget Specialists & Directors
- Internal Controls Managers
- Management Analysts

... Continued from Page 3

**1:15**

Launch Your Reporting Strategies to the Next Level: Partner with Your Program Managers

- 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
- Collaborate with your program managers to ensure that financial and program data are successfully linked

CARL L. MORAVITZ, Senior Managing Consultant, IBM

**2:15**

Break and Refreshments

**2:30**

Develop a Comprehensive Internal Controls System

- Establish effective internal controls that will lead to more effective and efficient operations

- Ensure reliability in your financial reporting and compliance with all applicable laws and regulations
- Cascade down the five areas of a control system

KEN BRESNAHAN, Principal in the Federal Services Operations Group, Grant Thornton LLP

**3:30**

Correct Internal Controls Deficiencies

- Learn how to monitor, correct and record deficiencies in your program
- Understand the elements of a corrective action plan
- Learn the role of a Senior Assessment Team in evaluating material weaknesses

J. SEAN HOFFMAN, Partner, Service Group Risk Management Leader, Performance & Technology, KPMG LLP

Tim Comello, Senior Manager, KPMG LLP

**4:30**

Conference 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 Chris Hicks at 202-739-9548 or email him at [Chris.Hicks@PerformanceInstitute.org](mailto:Chris.Hicks@PerformanceInstitute.org)

## POST-CONFERENCE WORKSHOPS

are designed to be an interactive way for participants to learn the latest techniques and implement them in their workplace. This workshop provides a platform to learn practical applications of current best practices. Space in this comprehensive workshop is limited, so be sure to reserve your seat today!

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

**9:00** Workshop: Successful Project Management Strategies for Financial Leaders

Agency leaders are continually asked to improve project management results as advanced financial management systems and practices are put into place. However, issues of transparency, oversight and deadline objectives are always challenging managers to set higher goals and expectations. There are many options to consider when choosing and designing a strong project management approach. This workshop will address the real-life lessons learned from implementing a successful project in order to better align results and impact the organization.

- Discover how to create clear and obtainable deliverables
- Identify problematic issues that may arise and learn how to increase business efficiency
- Establish how to ensure transparency and oversight within your project plans and deadlines

**12:00** Workshop Adjourns

## 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 bestpractices foundation to deliver the most effective and tested methodologies for improving performance.



# 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-Based Contracting
- 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 her at **[Jennifer.Mueller@PerformanceInstitute.org](mailto: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 solutions providers.

The Institute offers four different pre-designed sponsorship packages:


- Event Co-Sponsor
- Luncheon Sponsor
- Session 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](mailto:Meredith.Mason@PerformanceInstitute.org)**


# Venue & Hotel

## VENUE & HOTEL:

**Federal Financial Management Forum** will be held at The Performance Institute in Arlington, VA, just one block east of the Courthouse Metro stop on the Orange Line. A public parking garage is located just inside of the building.

 The Performance Institute Conference Center  
1515 N. Courthouse Rd., Suite 600  
Arlington, VA 22201  
877-992-9521

A limited number of rooms have been reserved at the Arlington Rosslyn Courtyard by Marriott at the prevailing rate of \$207. This rate is based on the Government Per Diem and is subject to change. Please call the hotel directly and reference code **"Federal Financial Management Forum"** 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](http://www.CourtyardArlingtonRosslyn.com)

## TUITION & GROUP DISCOUNTS:

The tuition rate for attending **Federal Financial Management Forum** is as follows:

Offerings	Early Bird	Regular Rate
Conference Registration	\$799*	\$899
Project Management Workshop		\$299

\* For the Early Bird rate, please register before:  
September 7, 2010.

For more information on group discounts, please contact Chris Hicks at 202-739-9548 or email him at [Chris.Hicks@PerformanceInstitute.org](mailto:Chris.Hicks@PerformanceInstitute.org).



## CPE CREDITS: 18

Delivery Method: Group-Live  
Program Level: Basic  
Prerequisite/Preparation: None

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](http://www.nasba.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.

# Registration Form



CALL  
877-992-9521



FAX THIS FORM TO  
866-234-0680



VISIT  
[www.PerformanceInstitute.org/FFMF](http://www.PerformanceInstitute.org/FFMF)

## REGISTRATION FORM

- Yes! Register me for Federal Financial Management Forum
- Yes! Register me for the Project Management Workshop
- 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: P802-WEB