

# Grants Technical Assistance Workshop Agenda

**OCTOBER 12-13, 2010**

**KEY BRIDGE MARRIOTT INTERNATIONAL  
 1401 LEE HIGHWAY  
 ARLINGTON, VA 22209**

**TUESDAY, OCTOBER 12, 2010**

7:00- 9:00 a.m.	Registration	Marriott Foyer
9:00-9:30 a.m.	Welcome/GTAW vision/Outline of Day Michael J. Nelson, Associate Administrator	Potomac Ballroom
9:30-10:00 a.m.	<i>Plenary Session</i> "Understanding your Notice of Award (NoA)"- Bruce Holmes	Potomac Ballroom
10:00-10:15 a.m.	Break (On your own)	Marriott Foyer
10:15-11:00 a.m.	<i>Plenary Session</i> "Payment Management System & Federal Financial Report" –Janet Fowler	Potomac Ballroom
11:00- 11:30 a.m.	Question and Answer	
11:30 a.m.-12:30 p.m.	Lunch on Your Own/Networking	
12:30-1:30 p.m.	Concurrent Workshops	
	<ul style="list-style-type: none"> <li>▪ Financial Management 101</li> <li>▪ Grants Architecture 101</li> <li>▪ Administrative Management</li> <li>▪ All things fiscal/budget</li> <li>▪ Peer Exchange</li> <li>▪ Open Space/Resource Library</li> <li>▪  Noncompeting Continuation-Streamline Process</li> <li>▪ PMS Demonstration</li> </ul>	Monroe Jefferson Washington Madison Adams Lincoln Potomac Salon A Potomac Salon D
1:30-1:45 p.m.	Break (On your own)	Marriott Foyer
1:45- 2:45 p.m.	Concurrent Workshops	
	<ul style="list-style-type: none"> <li>▪ Financial Management 101</li> <li>▪ Grants Architecture 101</li> <li>▪ Administrative Management</li> <li>▪ All things fiscal/budget</li> <li>▪ Peer Exchange</li> <li>▪ Open Space/Resource Library</li> <li>▪  Noncompeting Continuation-Streamline Process</li> <li>▪ PMS Demonstration</li> </ul>	Monroe Jefferson Washington Madison Adams Lincoln Potomac Salon A Potomac Salon D
2:45-3:15 p.m.	Networking/Adjourn	



## WORKSHOP DESCRIPTIONS-DAY 1

### 1. Financial Management 101

Monroe

Presenters: Wayne Bulls, Auditor and Arnold Silver, Senior Accountant

From the auditing perspective, grantees will learn about what makes an organization fiscally stable. In addition, the presenters will review the cost principles used to determine the allowability of costs charged to a federal grant award.

### 2. Grants Architecture 101

Jefferson

Presenter: Bruce Holmes, Grants Management Specialist

Audience: Grantees who would like an overview of the grants process from cradle to grave.

Grantees will receive an overview of the pre-award and post-award process; understand the difference between the responsibilities of the HRSA Project Officer versus the HRSA Grants Management Specialist as well as understand how HRSA DGMO interacts with the grantee business/fiscal and program offices. The facilitator will explain the DGMO acronyms of the HRSA grant world. Grantees will receive a clear overview of both the OFAM's infrastructure and the grant process.

### 3. Administrative Management:

Washington

Presenters: Vera M. Messina, Lead Grants Management Specialist

Grantees will walk-through post-award actions that are involved in the day-to-day administration of a HRSA grant. Grantees will receive detailed guidance regarding Prior Approval Actions such as change of program director, change/transfer of grantee or carryover of unobligated balances or submissions in response to terms and conditions.

### 4. All Things Fiscal/Budget

Madison

Presenters: Mickey Reynolds and Brian Feldman, Grants Management Specialist

*Audience:* Grantees who want to manage their spending... and not let their spending manage them, plus those who has fiscal questions of any kind.

This workshop will provide an introduction to the Federal cost principles for all types of grantees such as, but not limited, to Colleges and Universities; Non-profit and For-profit organizations and State and Local Government and Indian Tribes. Grantees will learn about the important factors that determine generally allowable costs.

### 5. Peer Exchange

Adams

Presenter: Kendra Williams, Program Officer

Audience: Grantees who would like to hear about real life examples from the field. Sufficient time will be set aside for question and answers. This workshop is designed to provide grant information from the grantee's perspective.

### 6. Non-Competing Continuation Streamline Process

Potomac Salon A

Presenters: Shonda Gosnell and Frances Woodburn, Grants Management Specialist

Audience: Project staff from all HRSA grants that typically submit applications for non-competing continuation funding (multi-year projects)

This workshop will provide grantees with an overview of the new streamlined grant continuation process. Grantees will learn about the Non-Competing Continuation Progress Report, the elimination of the Non-Competing continuation guidance, and the submission process within HRSA's EHBs. The presenters will describe the difference between the Project Officer and Grants Management roles for this process.



**7. Open Space/Resource Library**

Lincoln

Facilitators: Sign-up during registration or at break

Discussion Topics: TBD

Concept-Grantees will have the opportunity to facilitate table topic discussions. Grantees will sign up for a topic of interest. Geared for “out-of-the-box” type thinkers in an informal setting.

**8. Payment Management System-Demonstration**

Potomac Salon D

Presenter: Janet Morgan Fowler,

The Division of Payment Management has over 30 years of experience providing grant and grant like payments, cash management, and grant accounting services to Federal Agencies. DPM uses a custom-developed Payment Management System that provides grant recipients the tools to manage grant payment requests, financial inquiry options and disbursement reporting activities.

The PMS workshop will demonstrate the following:

- Operating the PMS
- How to make payment requests
- Manage Cash Flow
- Perform financial inquires for authorization and payment information
- Report quarterly disbursement data



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**WEDNESDAY, OCTOBER 13, 2010**

7:00- 9:00 a.m.	Registration	Marriott Foyer
9:00-9:15 a.m.	Welcome Back/Outline of Day Rick Goodman, Director	Potomac Ballroom
9:15-9:30 a.m.	<i>Plenary Session</i> “Recap-Understanding your Notice of Award (NOA)”	Potomac Ballroom
9:30 -9:45 a.m.	Break (On your own)	Marriott Foyer
9:45-10:45 a.m.	<i>Plenary Session</i> “Electronic Handbooks (EHBs)” –Melissa Amin	Potomac Ballroom
10:45- 11:00 a.m.	Question and Answer	
11:00-12:00 p.m.	Lunch-On Your Own/Networking	
12:00-1:00 p.m.	Concurrent Workshops	
	▪ Close-out and Federal Financial Report	Jefferson
	▪ Terms and Conditions	Washington
	▪ American Recovery and Reinvestment Act (ARRA) Federal Reporting	Madison
	▪  Federal Funding Accountability and Transparency Act (FFATA) Reporting Requirements: Subawards and Executive Compensation	Adams
	▪ Resource Library	Lincoln
	▪ EHB Demonstration	Potomac Salon A
	▪ DGMO Panel	Potomac Salon D
1:00-1:15p.m.	Break (On your own)	Marriott Foyer
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	▪ DGMO Panel	Potomac Salon D
2:30-3:00 p.m.	Town Hall featuring Michael J. Nelson, Associate Administrator, OFAM	Potomac Ballroom

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## WORKSHOP DESCRIPTIONS-DAY 2

### 1. Closeout Process and the Federal Financial Report

Jefferson

Presenters: Kelly Long and Jamie King

This workshop provides the grantee with an overview of how to successfully closeout their grant or cooperative agreement. Grantee's will learn how to report the grant's financial progress annually, through the Federal Financial Report (FFR) and will learn the importance of reconciling financial data and complying with all reporting requirements for closing their grant or cooperative agreement. Grantee's will understand how to manage grant closeout effectively and avoid cost overruns and deficits.

### 2. Terms and Conditions

Washington

Presenter: Darren Buckner

This workshop is designed to review an important part of the Notice of Award.

Grantees will gain an understanding of the differences between the Grant Terms, Grant Conditions and Reporting Requirements. At the end of the session, attendees will gain a better insight on managing their HRSA Awards.

### 3. ARRA Federal Reporting

Madison

Presenter, Erika Taylor, Grants Management Specialist

This workshop will provide grantees with an overview of the Recovery Act (ARRA) and FederalReporting.gov. The workshop will be presented from a grants management perspective, and will focus on financial reconciliation between the Payment Management System and FederalReporting.gov. Grantees will also learn how to determine when their 1512 Report can be marked final, as well as how to avoid noncompliance with the Recovery Act reporting requirements.

### 4. FFATA Reporting Requirements: Subawards and Executive Compensation

Adams

Presenter, Doretha Dixon, Grants Policy Analyst

Learn about the new Federal Funding Accountability and Transparency Act (FFATA) reporting requirements for new grants and cooperative agreements awarded on/after October 1, 2010. If you currently receive federal funds, plan to receive federal funds, or make subawards, this workshop is for you! In addition, there will be new information on other related requirements.

### 5. Division of Grants Management Operations Panel

Presenters: Shelia Gale, Vera Messina, Brad Barney and Neal Meyerson

Potomac Salon D

Facilitator, Nandini Assar

This workshop will be an open Question & Answer session on the management of HRSA's grant programs. Three senior grants management specialists will provide a brief overview of their area of expertise regarding specific grant programs and will be available to answer questions related to managing HRSA grants. Attendees will have ample time to ask questions.

### 6. Open Space/Resource Library

Lincoln

Facilitators: Sign-up during registration or at break

Discussion Topics: TBD

Concept-Grantees will have the opportunity to facilitate table topic discussions. Grantees will sign up for a topic of interest. Geared for "out-of-the-box" type thinkers in an informal setting.



## Office of Federal Assistance Management (OFAM)

Division of Grants Management Operations (DGMO)

### **7. Electronic Handbooks-Demonstration**

Potomac Salon A

Presenter: Melissa Amin, Grants Management Specialist

This workshop will demonstrate registering and adding the grant to the portfolio in the EHBs. The workshop will also demonstrate how to get assistance for registering in the EHBs or troubleshooting EHBs errors. There will also be a general Q & A session for grantees that have additional questions



## Office of Federal Assistance Management (OFAM)

Division of Grants Management Operations (DGMO)

### **DHHS/HEALTH RESOURCES SERVICES ADMINISTRATION**

Michael J. Nelson, Associate Administrator, Office of Federal Assistance Management  
Rick Goodman, Director, Division of Grants Management Operations

### **PRESENTERS BIO'S**

Melissa Amin is a Program Analyst in the Systems and Reporting Group of the Division of Grants Management Operations. She serves as the primary point of contact for the Electronic Handbook (EHBs). Previously, she worked at the HRSA Call Center for 3 years as a lead for the EHBs.

Brad Barney is a Grants Management Specialist with the Division of Grants Management Operations, Research and Training Branch, where he has worked since 2002. He holds a Masters Degree in Public Administration, with an emphasis in non-profit administration.

Darren S. Buckner serves as a Lead Grants Management Specialist & Team Leader in the Systems and Reporting Group of the Division of Grants Management Operations (DGMO) of the Office of Federal Assistance Management (OFAM) of HRSA. In this capacity, he assists in the development of innovative policies and procedures in structuring an E-grants System. Additionally, Mr. Buckner assists in facilitating the awarding of federal financial assistance to grantees in a HHS sanctioned system Center of Excellence (COE) for government wide reporting purposes. Mr. Buckner has represented OFAM, at grantee meetings, Government Partners meetings in the United States as well as abroad. Prior to coming to HRSA, Mr. Buckner served as a Senior Accountant with the National Minority AIDS Council, and a Financial Information System Analyst with Scheduled Airlines Traffic Offices (SATOTRAVEL). He has obtained a BA in accounting from Dillard University.

Wayne Bulls-Mr. Bulls is an auditor with HRSA's Office of Federal Assistance Management Division of Financial Integrity since 2008. Mr. Bulls currently serves as a point of contact with the Office of Inspector General with a focus on investigating complaints filed against HRSA grantees. Mr. Bulls obtained a Bachelor Degree in accounting from Strayer University in 2000.

Doretha Dixon is a Grants Policy Analyst in the Division of Grants Policy, Office of Federal Assistance Management at HRSA. She has prior grants experience as a Coordinator with the Epilepsy Foundation's National Education Programs and a Grants Specialist with the National Endowment for the Arts. Her joys are billiards, family, film and long road trips.

Brian Feldman is a Grants Management Specialist with the Health Services Branch, Division of Grants Management Operations, Office of Federal Assistance Management, Health Resources and Services Administration (HRSA), since July 2008. Mr. Feldman participated in the HRSA Scholars' program, rotating through 4 different offices within HRSA before being permanently placed as a Grants Management Specialist. From October 2004 through June 2007 Brian was employed as a Grants Clerk at the National Institute of Child Health and Human Development, one of the 27 institutes of the National Institutes of Health.



## Office of Federal Assistance Management (OFAM)

### Division of Grants Management Operations (DGMO)

Janet Morgan Fowler joined the US Department of Health and Human Services (HHS), Division of Payment Management (DPM) as the Team Leader of the Government and Tribal Payment Branch in March 2005. During her tenure as an Accountant with DPM, she has served as the Training Coordinator for both domestic and international grant recipients as well as for awarding agencies throughout several regions in the United States. She has also held the distinct pleasure of traveling abroad to facilitate training presentations regarding the Payment Management System (PMS) in Kenya, East Africa, Cairo, Egypt and Abidjan, Cote D'Ivoire (Ivory Coast) in conjunction with other HHS colleagues from the Center for Disease Control and Prevention (CDC) in Atlanta, GA. Prior to joining DPM, Ms. Fowler performed her duties as a Supervisory Accountant at the United States Government Accountability Office in Washington, DC for five and one half years. She also gained extensive accounting experience while employed within the banking industry, state universities and other facets of the private sector industry. Ms. Fowler earned her Bachelor of Science degree in Accounting from Hampton University in May 1990 is currently pursuing a Masters Degree in Taxation.

Sheila Gale is a Quality Control Grants Management Specialist with 12 years experience with grants. Ms. Gale leads a team of eight Grant Specialists in the Health Services Branch which handles the Community Health Center Grants, Ryan White Grant Program, Poison Control, as well as other grants. Previous grants experience was gained in the HIV/AIDS Bureau which handled the Ryan White HIV/AIDs program.

Shonda Gosnell is a Senior Grants Management Specialist within the Division of Grants Management Operations, Government and Special Focus Branch. She came to the Department of Health and Human Services in 2002 as part of the HRSA Scholar's program. As a senior grants management specialist, she has been the program lead on the Ryan White Part A and B program, the Bioterrorism Hospital Preparedness program as well as other politically recognized programs. Ms. Gosnell has been frequently selected to represent the HRSA Office of Federal Assistance Management on a variety of in house and interagency workgroups and special projects. Specifically, she has been a lead participant in the Non Competing Continuation Streamlining workgroup since its onset in 2009. Shonda is a recognized spokesperson on the topic of grants and financial management. She earned her Bachelor of Science degree from Old Dominion University.

Bruce Holmes- Mr. Holmes has been a part of the HRSA Division of Grants Management Operations Team for about 10 years. He started in the Grants Management Field at the ground level and is now a Senior Grants Management Specialist within the Office of Federal Assistance and Management's Division of Grants Management Operations, Research and Training Branch Team. His grants experience ranges from within the private for-profit, non-profit and the military sectors. Mr. Holmes' motto is "It is my good pleasure to serve."

Jamie King is a Lead Grants Management Specialist with over 15 years experience. Mr. King leads a team of seven Grant Specialists in the Research and Training Branch which handles the Health Profession and Maternal and Child Health training grants, research grants as well as other grants. Prior to becoming a Grants Specialist, Mr. King's background was Computer Information Systems.

Kelly Long serves as the Lead Program Analyst and Team Leader in the Grants Monitoring and Contract Support Section of the Division of Grants Management Operations (DGMO), Office of Federal Assistance Management (OFAM) of HRSA. She has been with HRSA since 2000. In her capacity, she provides oversight and administration in the management of the Division's contract activities including HRSA's application center and grant closeout support. She leads and directs staff in post-award monitoring of HRSA grant awards to ensure grantees are making adequate progress, reporting consistent financial data, and spending federal dollars at an acceptable rate. She also provides leadership and oversight to ensure grantee's are in compliance with closeout requirements. She earned her Bachelor of Science degree at the University of Maryland



## Office of Federal Assistance Management (OFAM)

### Division of Grants Management Operations (DGMO)

Vera Messina is a Lead Grants Management Specialist in HRSA's Division of Grants Management Operations, Health Services Branch. Vera has worked in the Federal grants management field for twelve years – eight years with the US Department of Education, managing grants to schools, educational agencies, and non-profits that facilitated programming to create safe and drug-free schools and to assist students to succeed. In the four years that Vera has been at HRSA, as a grants management specialist she monitored over 125 grants to entities that provide health services to those most in need. As a Team Leader, she presently leads a team of eight grants management specialists, acting as the Quality Controller to insure the accuracy of all grant-making documents and the expert on HRSA policies and procedures as related to the grant timeline, especially the award and post-award phases.

Neal Meyerson- Team Leader, Government and Special Focus Branch, Division of Grants Management Operations, OFAM. Neal has been at HRSA since 1989, working as a grants management specialist for the Bureau of Health Profession, HIV/AIDS Bureau, and Bureau of Primary Healthcare, and as a Team Leader in the Division of Grants Management Operations since 2004. He previously worked at the National Cancer Institute/NIH. He has been an active member of the National Grants Management Association, serving both as the treasurer and member of the board of directors. He is a graduate of Clark University and also earned a MPA degree from American University.

Mickey Reynolds-Mrs. Mickey Reynolds is a Grants Management Specialist within the Division of Grants Management Operations, Government and Special Focus Branch. Mrs. Reynolds has 32 years of grants management experience: 13 years with National Institute of Health and 19 years with the Health Resources and Services Administration. Mrs. Reynolds has mentored 15 new grants management specialist and served on several grant committees.

Arnold H. Silver-Staff Accountant, Division of Financial Integrity, Office of Federal Assistance Management, HRSA  
1971, B.S. Degree in Business Administration from University of Maryland  
1973, M.B.A. from Loyola College, Baltimore, Maryland  
1983, B.S. Degree in Accounting from University of Maryland  
1973-1978, Statistician with District of Columbia Government performing surveys of wage rates  
1978-1983, MIS with U.S. Department of Education analyzing data relative to grant programs.  
1983-Present, Staff Accountant with HRSA.

Mr. Silver, in all 27 years with HRSA, worked as an audit resolution official resolving audit findings and recommendations relative to HRSA grantee organizations.

Erika Taylor is a Grants Management Specialist within the HRSA Division of Grants Management Operations. She was hired as a temporary employee under the American Recovery and Reinvestment Act (ARRA) in 2009 and has since accepted a permanent position within the agency. In her position, she is primarily responsible for post-award monitoring of HRSA ARRA grant awards to ensure timely, accurate, and consistent reporting of financial data, as well as grant closeout. Prior to HRSA, Ms. Taylor worked at the Minnesota Department of Education, where she oversaw the financial, as well as the programmatic aspects of grants; she also served as the agency's grant review coordinator for a period of time. Ms. Taylor has a Master's degree in School Psychology from the University of Minnesota, and received her undergraduate degree from Duke University.

Kendra Williams, MPA, Public Health Analyst, HIV/AIDS Bureau, Division of Community Based Programs Southern Region-Ms. Williams is a Project Officer in the HIV/AIDS (HAB) at the Health Resources and Services Administration (HRSA). As Project Officer, Kendra Williams is responsible for managing and providing technical assistance to Part C and Part D Ryan White funded programs in Mississippi and South Carolina. Kendra Williams received her undergraduate degree in Health Education and Masters of Public Administration from North Carolina Central University in Durham, North Carolina. She completed the Non-profit Certificate program at Duke University. Kendra Williams joined HRSA in September 2007 as a HRSA Scholar and later joined HAB in 2008 as a Project Officer.



## Office of Federal Assistance Management (OFAM)

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### Division of Grants Management Operations (DGMO)

Frances Woodburn is a Grants Management Specialist within the Division of Grants Management Operations, Health Services Branch. She has been with HRSA since 2007, but prior to coming to HRSA, she worked on the grantee side as a Contract and Grants Specialist for an International Non-Profit Public Health Organization in Washington D.C. Frances has also served on the NCC streamlining workgroup and brings a wealth of knowledge regarding the new process.

### **DIVISION OF GRANTS MANAGEMENT OPERATIONS WORKGROUP:**

Kevin Arnone  
Nandini Assar  
Renetta Boyd  
Bruce Holmes  
Kelly Long  
Donna Marx

### **SPECIAL THANKS TO ALL OF OUR HRSA VOLUNTEERS!**

Denise Boyer  
Cecelia Maryland Twyman  
Patrick Lockett  
Tracy Worley