

# BOARD OF DIRECTORS ELECTIONS



## **Jerry Bertrand, CGMS**

Director

Public Impact Advisors

### **Background**

I have a bachelor's degree in accounting and am a Certified Grants Management Specialist (CGMS), and am involved in various professional associations and professional development programs. My background includes 11 years in state government (unemployment insurance program management; accountant, budget analyst and senior grants officer); 12 years in the nonprofit sector (senior grants officer); and 11 years leading a private consulting company. I currently serve as director of the consulting and training firm Public Impact Advisors, where we assist organizations and their staff with navigating the full lifecycle of federal grants. I have delivered approximately 1,000 full days of grants/financial management training and led approximately 50 consulting engagements, including services provided for over 20 federal agencies, 10 state governments and numerous nonprofit organizations and institutions of higher education. Having provided consulting and training services to a large variety of organizations and organization types gives me the ability to bring board leadership that is considerate of the needs of all constituents: federal, state, local, tribal, higher education, nonprofit and commercial organizations.

### **Candidate Profile: Financial Operations**

Financial operations experience: My background includes serving as accountant in a general ledger accounting operation and budget analyst for a large state agency, including accurate financial tracking and reconciliations, budget preparation, oversight of spending of various agency programs/associated recommendations, and budget to actuals comparisons. In later roles in government and nonprofit sectors, I performed fiscal oversight of grantee organizations, ensuring strong fiscal systems and cost compliance.

As lead consultant at Public Impact Advisors, I have advised organizations across the spectrum of financial management, including:

- Intensive monitoring reviews of grantee organizations, analyzing spending and policies/procedures, leading to operational improvement and safeguarding of funds;
- Review of hundreds of budgets and single audits to ensure proper funds utilization, appropriate fiscal systems, and safe guarding of resources;
- Creation of systems leading to better fiscal management/oversight;  
*Example: I led work building a grantee risk assessment and oversight protocol (including various procedures and tools) for a seven-state consortium.*
- Training and education for hundreds of organizations on implementing financial management requirements;
- Creating indirect cost rate proposals; and
- Coaching, mentoring, and technical assistance for financial staff.

### **Board Experience**

I have served as treasurer on two boards, HFG Home for Young Men and Howard Payne University Alumni Association. As a consultant, I have provided training to a nonprofit board.

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## **NGMA Experience/Volunteering**

I have led the following Annual Grants Training (AGT) sessions:

- 2013 - Grant Compliance as a Team Effort and Financial Management Round Robin
- 2014 - Solving Grants Management Problems
- 2019 - Uniform Guidance Overview and Monitoring Federal Grants
- 2022 - Grants Management Scorecard
- 2025 - Federal Grant Myths and Misunderstandings

I led the following sessions for the NGMA Austin, TX Chapter (now defunct):

- 2015 - Supercircular-What are the Key Changes?
- 2016 - Grant Compliance Strategies for Success
- 2018 - Internal Controls for Grants Management

I led the following presentation for the NGMA Dallas/Fort Worth Chapter:

- 2024 - Uniform Guidance Updates

I currently serve as a Grants Management Body of Knowledge (GMBok) trainer and have also served as a mentor/adviser to groups preparing for the Certified Grants Management Specialist (CGMS) exam.

## **Goal of NGMA's Strategic Framework That Most Resonates with Me**

Strategic Goal #1: "NGMA will elevate the vital role of grants management professionals in stewardship of grant funds and will promote the profession to future professionals and stakeholders," resonates most with me. It is important that we continue to attract talented and skilled individuals into the grants profession, and work to help organizations understand the importance of having qualified grant managers on staff. I am particularly passionate about bringing new personnel into grants management, and promoting the profession to those who are not aware of it. This effort could include more NGMA staff, board, and/or member presentations to students, groups, and other associations.

## **Top Two Challenges Over the Next 3-5 Years for the Profession**

Navigating the changing funding landscape. The 2025 funding landscape has brought new challenges, and NGMA can continue to serve a key role and assisting its memberships understand and navigate the new environment. Bringing clarity (when possible) and guidance is an important function of NGMA.

Leveraging technology effectively and ethically. It is critical that organizations embrace technology solutions to remain effective. The emergence of artificial intelligence has created new considerations, possibilities, solutions, and in some cases, ethical dilemmas. NGMA can serve an important role in assisting organizations in this environment.