

2017 Not-for-Profit Conference Agenda

July 20, 2017

Indianapolis Marriott East

7:30-8:15 a.m. CFO Roundtable Breakfast (optional)

Table topic discussions you can choose from include: Engaging the Younger Donor Population; Introduction to the State Board of Accounts – FAQs When Completing an E1; Form 990; Board Engagement; and PCI Compliance.

8:30-9:50 a.m. Opening General Session

Accounting Update (A&A) (Yellow Book)

[Richard Cole, CPA, CGMA, Financial Accounting Standards Board](#)

This session will provide an overview of recent Accounting Standards Updates (ASUs) that impact not-for-profits, including the recent ASU on Presentation of Financial Statements of Not-for-Profit Entities. It will also provide an overview of projects the FASB is working on that could impact not-for-profit entities.

10-11 a.m. Breakout Sessions

A. Excel - Auditing Your Spreadsheets for Maximum Accuracy

[Bryan Smith, CPA, CISA, CITP, CPA Crossings, LLC](#)

Did you know Excel has 400-500 functions depending on your version? Did you know there are 12 different function categories? Did you know you could create your own functions? After you attend this session, you will be in the know! We will focus on proofing and auditing your spreadsheets. You will learn how to build spreadsheets that validate the accuracy of your calculations and techniques to use the Data Validation feature to validate data entry. You will also learn techniques to cross-foot your data to ensure accuracy as well as how to use the various Excel Auditing Tools.

B. Simple & Effective Methods for Strengthening Internal Controls to Combat Fraud Opportunities (A&A)

[Chris DuKate, CPA, Crowe Horwath LLP](#)

[Kevin Kerswick, CPA, Crowe Horwath LLP](#)

[Ann Merkel, The National Bank of Indianapolis](#)

This session will focus on strategies and best practices to strengthen your internal control environment that are both simple to implement and cost-effective without placing an undue burden on staff. It will also provide a discussion on the breakdown in controls that allow fraud to occur, tackle fraud from a banking perspective, provide examples of business email compromise and suggestions for combating.

C. Maximizing the Lifetime Value of Your Donors for Fundraising Success

[Jay Love, Bloomerang](#)

Within your donor database lies untold lifetime value. Unfortunately, many nonprofits fail to properly nurture and steward their donors, and are content with high acquisition and high churn.

Why let this enormous asset go underutilized? In this session, we will cover the tenets of effective database management, no matter what program or vendor you use. We will show examples of best practices in data management, communication segmenting, engagement tracking and reporting in order to help your team work smarter, not harder.

11:15 a.m.-12:15 p.m. Breakout Sessions

A. Introduction to Data Analytics and Microsoft's Power BI Tools

[Bryan Smith, CPA, CISA, CITP, CPA Crossings, LLC](#)

Excel is the #1 data analysis tool for CPAs. Yet most CPAs have never learned the basics of data analysis using Excel or the tools that Excel offers to help with data analysis. Those that learned to analyze data using PivotTables, soon learned there were many weaknesses in PivotTables that resulted in elaborate calculations in order to perform simple tasks. In this session, we will provide an overview of the various PowerBI tools and discuss Microsoft's PowerBI Strategy. We will begin by explaining the challenges faced by many accountants when it comes to analyzing data in Excel. You will learn how each PowerBI tool reduces the challenges and improves your data analytic skills. You will also gain a complete understanding of when to use which tool.

B. Time for a UBI Check-Up (A&A)

[Emilie Knieriem, CPA, Crowe Horwath LLP](#)
[Rachel Spurlock, CPA, Crowe Horwath LLP](#)

The IRS has increased its focus on Unrelated Business Income (“UBI”) activities and, with changes in the Information Document Request (“IDR”) process being implemented later this year, there may be more audits on the horizon. During this session, we will help you identify risks and share best practices on documentation and recordkeeping to support UBI or non-UBI positions.

C. Revenue Recognition (A&A)

[Richard Cole, CPA, CGMA, Financial Accounting Standards Board](#)

This session will provide an overview of the Revenue Recognition accounting standard, implementation examples for the standard and an update on the FASB's Revenue Recognition of Grants and Contracts for Not-for-Profit Entities project.

12:15-1 p.m. Luncheon

1-2 p.m. General Session

CFO, Controller, or Both: How to Wear Multiple Hats and Deliver Exceptional Value

[Jon Lokhorst, CPA-Inactive, Lokhorst Consulting LLC](#)

Many small organizations do not have the resources to employ both a chief financial officer and a controller, requiring one person to wear both hats. Beyond that, business leaders often use these titles interchangeably or don't understand the different focus and skillset they require. This session explores the unique challenges of each role and how the person who fills both can successfully navigate those changes and provide exception value to their organization.

2:10-3:10 p.m. Breakout Sessions

A. Managing NFP Information Technology Risks

Ryan R. Elmore, *Katz, Sapper & Miller, LLP* and Dan Resnick, *KSM Consulting*

Do you find Information Technology (IT) intimidating? This session will serve as a primer on basic IT issues relative to data security and compliance risks, including an exploration of the basic IT risks and controls from the mindset of an IT auditor, a discussion on how organizations should evaluate critical third-party services and applications, and how to go the extra mile in securing your network and data.

B. Presenting Financial and Complex Information

[Rhonda Tamulonis, *When You Leave the Room*](#)

[Rob Norris, *When You Leave the Room*](#)

Turning dry data into compelling visuals that create “aha!” moments is both an art and a science. In this session, you will learn the best practices in determining which type of image to use in developing charts, graphs and tables that clearly support good business decisions. You will leave knowing how to simplify complex information, how to display more powerful graphics, how to accentuate trends and patterns, and how to take advantage of PowerPoint SmartArt (an easy-to-use feature for turning text into more visually appealing information).

C. The Ticking Time Bomb: Don't Get Caught Without a Succession Plan

[Jon Lokhorst, *CPA-Inactive, Lokhorst Consulting LLC*](#)

Successful leadership transitions are critical to the sustainability and vitality of nonprofit organizations. Yet, the 2016 Nonprofit Sector Leadership Report states that 77% of organizations have no formal succession plan. To make matters worse, recent surveys show that two-thirds of executive directors plan to retire or leave in the next five years at any given time. And less than one-third of organizations have a structured approach to leadership development. That leaves many organizations sitting on a ticking time bomb that could derail their future, if not threaten their existence. Unfortunately, although succession planning involves many participants, few know where to begin. This session is designed to help nonprofit CEOs, CFOs, auditors and board members jump start the conversation by identifying common barriers to the planning process. The presentation addresses the keys to effective succession planning, along with steps for organizations to take now to develop their next wave of leadership.

3:25-4:45 p.m. Closing General Session

Ethics Don't Come In 31 Flavors (Ethics)

[Daniel Porter, *CFE*](#)

I scream you scream, we all scream for ice cream! Most of us love ice cream, and we all have a preferred flavor. Some choose vanilla, some choose chocolate, some choose pistachio almond. Unlike choosing ice cream flavors, ethical decisions are more important and have far greater consequences. This session explores ethics and the decision-making process.