2026 Not-for-Profit Conference
Thursday, July 23, 2026
502 East Event Centre – Carmel, IN

CPE: 8 hours (includes up to 4.00 hours of A&A and/or 1 hour of Ethics)
Yellow book: 1 hour
CLE: 6.8 hours (Includes 1.2 hours of Ethics)

7:30–8:20 a.m. Bonus Session (50 minutes)

Economy, Demographics, and Your Donor Community

Bob Mims, CPA, The Knowledge Institute, LLC

Economic conditions and demographic shifts play a significant role in shaping fundraising strategies. This session will examine recent data trends and how they intersect with donor engagement and stewardship. It will also highlight the importance of emotional intelligence, active listening, and cross-team collaboration in successful fundraising efforts.

8:30–9:30 a.m. General Session (60 minutes)

Supercharge Your NFP: How AI and Hyper Automation Is Within Reach

Karen Bodach, CPA, Forvis Mazars and *Ryan Kauzlick, Forvis Mazars*

As organizations face increasing pressure to deliver more value with fewer resources, AI and hyper automation are emerging as critical enablers of efficiency, accuracy, and scalability. This session explores how organizations can move beyond isolated automation efforts and adopt a disciplined, business-driven approach to hyper automation—combining AI, robotic process automation (RPA), low-code/no-code tools, and system integration to deliver measurable results.

Attendees will learn how to identify high-impact automation opportunities, prioritize initiatives based on value and feasibility, and avoid common pitfalls that prevent AI investments from reaching production. Through practical, industry-agnostic examples, the session highlights how automation can reduce manual work, improve decision-making, and enhance employee engagement—while maintaining appropriate governance and risk awareness.

Participants leave with a clear roadmap to begin or accelerate their automation journey and turn innovation into sustainable business value.

9:30–9:40 a.m. Break (10 mins)

9:40–10:50 a.m. Breakout sessions (70 minutes)

A. Designing Competitive and Compliant Compensation Programs in the Nonprofit Sector

Megan Nail, NFP

Nonprofit compensation isn't designed in a vacuum—it requires the right balance of mission, market data, and governance. In this practical and engaging session, we will break down how thoughtful pay design and disciplined decision-making can help organizations attract talent, manage risk, and support long-term impact.
Whether you're a small nonprofit navigating pay decisions with limited resources or a larger organization refining programs for leadership and staff, this session delivers actionable insights you can apply immediately.

During this webinar, you will explore:

- How to design competitive, mission-aligned compensation programs
- Best practices for benchmarking nonprofit roles and interpreting market data
- Governance and compliance considerations that boards and leaders must understand
- Practical approaches to executive and staff compensation that support performance and retention

B. Friction or Flow: Multigenerational Hybrid Shifts
Judy Hissong, Nesso Strategies
Five generations in your organization combined with different working locations creates a necessity for setting expectations, and developing skills in feedback, resilience, communication, and technology. We will explore how generational perspectives shape behavior and create assumptions in hybrid environments, along with the antidote to those assumptions.

Objectives:
- Explore different workplace values in the workplace
- Identify how hybrid work amplifies misunderstandings
- Practice communication strategies to build trust and alignment

C. Charitable Giving Under OBBB: Implications for Donors and Nonprofits
Casse Tate, CPA, CAP, Katz, Sapper & Miller
The One Big Beautiful Bill (OBBB) introduces several key tax provisions with implications for not-for-profit organizations. Most significant is a provision that affects the deductibility of charitable contributions for individuals who itemize their deductions. Additionally, new opportunities have arisen for charitable deductions for non-itemizers.

While organizations should not advise donors on individual tax impact, it is important to recognize how this new legislation may influence donors and, ultimately, charitable giving.

Join us for a timely discussion on the highlights of the new legislation related to charitable contributions and other matters that affect not-for-profits.

10:50–11:00 a.m. Networking Break (10 mins)

11:00 a.m.–12:10 p.m. Breakout sessions (70 minutes)

A. Cybersecurity Essentials for CPAs and Financial Advisors: Practical Guidance
Scott Alldridge, VisibleOps AI
Cybersecurity is no longer just a technology issue—it's a business issue that needs "emergency status." Best practices with cybersecurity is paramount for financial stability, compliance, and business continuity cybersecurity is now a high risk issue that impacts firms of every size. As trusted advisors, CPAs and Financial Advisors are increasingly on the front lines, guiding clients through risks that can directly affect their bottom line, reputation, and regulatory standing.

In this engaging session, Amazon bestselling author Scott Alldridge will share insights from his book VisibleOps Cybersecurity, weaving the "Golden Thread" of cybersecurity through real-world stories, case studies, and practical frameworks. You'll gain a clear understanding of the current state of cybersecurity threats, regulatory pressures, and evolving risks across industries. More importantly, you'll leave with practical, plain-English guidance that you can apply immediately to strengthen both your firm's security posture and your advisory role with clients.

B. HR/Fractional Accounting
Amy Hehman, PHR, SHRM-CP, Barnes Dennig
Session Description Coming Soon

C. GAAP Update and Refresher (A&A)
Daniel Waninger, CPA, Forvis Mazars
This session will review recently issued GAAP pronouncements which may impact nonprofit organizations, give an overview FASB projects in process, and include a discussion of common errors in nonprofit accounting and reporting.

12:10–12:40 p.m. Lunch (30 mins)

12:40–1:40 p.m. General Session (60 minutes)

Culture in Motion: Leading Change that Brings People Along
Judy Hissong, Nesso Strategies
Change is constant. Technology, client expectations, and increasing pressure for performance put focus on efficiencies in both strategies and systems. And while systems can be updated overnight, culture changes at the speed of trust. We will explore the invisible (yet powerful) role culture plays in determining whether change efforts stall, succeed, or transform your organization.

Objectives:
- Identify cultural forces shaping behavior
- Understand how resistance to change shows up
- Examine leadership behaviors that work in your culture for the future of your organization

1:40–2:00 p.m. Break (20 minutes)

2:00–3:10 p.m. Breakout sessions (70 minutes)

A. Fraud Protection & Mitigation
Penelope (Penny) Lewis, CFP, Huntington National Bank, *Jim Kramer, Cherry Bekaert Advisory LLC, Rebekah Payne, CPA, Cherry Bekaert Advisory LLC*
Explore practical strategies to prevent, detect and respond to fraud across financial operations within your not-for-profit organization. This session connects banking controls with accounting safeguards and the IT capabilities that enable them. Attendees will leave with ideas for reducing exposure and improving controls to prevent losses.

B. Using Data Effectively
Bob Mims, CPA, The Knowledge Institute, LLC
Session Description Coming Soon

C. Navigating Uniform Guidance and Single Audits: Overview & Update (A&A – Yellow Book)
Eric Wildermuth, CPA, Crowe and *Lucy Hobson, CPA, Crowe*
The requirements of Uniform Guidance can feel overwhelming for many not-for-profit organizations that receive federal grants. This session provides a high-level overview of Uniform Guidance fundamentals and related compliance requirements, along with a discussion of recent updates to the Compliance Supplement.

3:10 – 3:20 p.m. Break (10 minutes)

3:20–4:30 p.m. General Session (70 minutes)

Ethics in a World of AI: Managing Risk for Not for Profits (Ethics)

Karl Ahlrichs, ExpertSpeaks

AI is no longer a "future issue" for accountants—it's already embedded in audit tools, fraud detection, grant reporting, and everyday spreadsheets, often without clear rules or safeguards. In this closing general session, we'll take a practical, non-hype look at how AI can help and how it can hurt—especially in nonprofit and governmental environments where mistakes and fraud have real human consequences.

You'll see real-world examples of AI gone right and wrong, learn a simple framework for questioning AI outputs, and get language you can use with executives, boards, and clients who want speed without understanding the risk. You'll leave with checklists, sample policy elements, and prompts tailored to accounting, audit, and fraud scenarios—plus a clearer sense of when to trust AI, when to verify, and when to say "no."

Adjourn