

INNOVATE 2018 Schedule

Tue, Apr 10, 2018

6:00pm

INNOVATE HAPPY HOUR

🕒 6:00pm - 8:00pm, Apr 10

Join us as we kick off INNOVATE.

Wed, Apr 11, 2018

7:00am

Breakfast & Registration

🕒 7:00am - 8:00am, Apr 11

📍 Salon A1

A full continental breakfast will be served. Our registration desk will also be open located outside of Salon A1.

8:00am

Keynote: Evidence of Impact – Challenges and Opportunities in the Shift Toward Outcomes

🕒 8:00am - 8:45am, Apr 11

📍 Salon 2,3,4

GuideStar offers a unique value and perspective to leaders in the nonprofit sector. Fundraisers use GuideStar to amplify their organization's voice – helping reach 30M people a year. Donors, researchers and C-suite executives use GuideStar's data and intelligence to shape their thinking about financial health, compensation, and, increasingly, evidence of impact. Adrian will share insights from GuideStar and its network of partners – highlighting the challenges and opportunities in the shift toward outcomes and helpful ways you can drive from planning to execution in an outcomes framework at every level of your organization.

Speaker:



Adrian Bordone

VP of Strategic Partnerships, Guidestar, Inc.

MIP Fundamentals: Use MIP Efficiently by Knowing All the Functions of the Software: Part 1

🕒 9:00am - 9:50am, Apr 11

📍 Weatherly

This session is designed for new Abila MIP users that will teach best practices and shortcuts that enable users to work faster and more efficiently. Topics include workstation customization, use of entry defaults, saving favorite reports in the process manager, using recurring entries, distribution codes examples and the use of short-cut keys (F5 & F6).

Speaker:



Steve Roese

Project Consultant, JMT Consulting Group



Lucy Brennan

Project Consultant, JMT Consulting Group

MIP Mastery: Best Practices for System Setup and Data Entry, Closing Processes

🕒 9:00am - 9:50am, Apr 11

Speaker:



Dennis Guiney

Technical Specialist, JMT Consulting Group

Intacct Fundamentals: Managing Grants

🕒 9:00am - 9:50am, Apr 11

Speaker:



John Tiso

Client Support Manager, JMT Consulting Group

Intacct Mastery: Credit Card Transaction Tracking Within Intacct

🕒 9:00am - 9:50am, Apr 11

Speaker:



Dagi Stanton

Project Consultant, JMT Consulting Group

Financial Leadership: Practical Magic--Taking the Mystery out of Implementing ASU 2016-14

🕒 9:00am - 9:50am, Apr 11

📍 Freedom

If you work with or for a not-for-profit organization, you've probably been watching how the changes is ASU 2016-14 have been unfolding. The AICPA and others have presented overviews and spoken in high-level terms about how the changes are going to affect NFPs, but resources addressing how the changes will truly impact your organization are few and far between...until now. This workshop is designed to provide attendees with fundamental tools necessary to evaluate transaction flow and recording to meet the myriad of changes in the new standard. Using specific examples from the AICPA's guidance, attendees will work through the distinct aspects of the net asset classifications; investment returns and expenses; and expanded disclosure guidelines. This is one session you don't want to miss!

Speaker:



Neely Duncan

Partner, Lane Gorman Trubitt, LLC

10:00am

**MIP Fundamentals: Use MIP Efficiently by Knowing All the Functions of the Software: Part 2
COPY**

🕒 10:00am - 11:10am, Apr 11

This session is designed for new Abila MIP users that will teach best practices and shortcuts that enable users to work faster and more efficiently. Topics include workstation customization, use of entry defaults, saving favorite reports in the process manager, using recurring entries, distribution codes examples and the use of short-cut keys (F5 & F6).

Speaker:



Steve Roese

Project Consultant, JMT Consulting Group



Lucy Brennan

Project Consultant, JMT Consulting Group

MIP Mastery: Produce your Financials in MIP with Advanced Reporting (Hands On)

🕒 10:00am - 11:10am, Apr 11

Speaker:



Shazeeda Teekah

Project Manager, JMT Consulting Group

Intacct Fundamentals: Workforce Go! Engaging Your Entire Workforce Through Best Practices in Human Capital Management

🕒 10:00am - 11:10am, Apr 11

An engaged workforce is satisfied and productive. Organizations need a human capital strategy that enables them to think strategically about managing, engaging and retaining their workforce. Sadly, traditional Human Capital Management (HCM) thinking and solutions have to often failed to address the needs of the workforce. It's time to think differently about your HCM strategy and tools and technologies you use to engage and retain your entire workforce.

Speaker:



Chris Goheen

President, Workforce Go!

Intacct Mastery: Advanced Reports Don't Have to Be So Advanced (Hands On)

🕒 10:00am - 11:10am, Apr 11

Speaker:



Geoff Hearn

Project Consultant, JMT Consulting Group

Financial Leadership: How the Innovative and Mission-Driven Nonprofit CFO Role Can

Transform Organizations and Ultimately the Sector

🕒 10:00am - 11:10am, Apr 11

Nonprofit CFO's primary function used to reflect the ebbs and flows of transactional financial activity. Then they took this information, analyzed it, and put it context in order to partner, sometimes to muscle in, with leadership to react to pre-determined organizational strategies. That too is in the rear view mirror. Nonprofit CFO's now are assumed to be an assertive organizational leadership voice. They must proactively identify and finance compelling mission investment (leadership, infrastructure, compensation structure, technology, program innovation, new programs, research and evaluation among others) to achieve success and aspirational impact. Nonprofit CFO's as a profession must ultimately, as the competitive times require, drive the innovative trends for the sector at large. This presentation explores how the non profit sector will rely on innovative CFO's to build financially sustainable organizations to enable the non profit sector to assert it's unique corporate societal role with appropriate and greater measurable impact.

Speaker:



Russell Pomeranz

Chair Emeritus, Workforce Professionals Training Institute

● 11:10am

Break

🕒 11:10am - 11:30am, Apr 11

● 11:30am

MIP Fundamentals: Use MIP Efficiently by Knowing All the Functions of the Software: Part 3 COPY COPY

🕒 11:30am - 12:10pm, Apr 11

This session is designed for new Abila MIP users that will teach best practices and shortcuts that enable users to work faster and more efficiently. Topics include workstation customization, use of entry defaults, saving favorite reports in the process manager, using recurring entries, distribution codes examples and the use of short-cut keys (F5 & F6).

Speaker:



Steve Roese

Project Consultant, JMT Consulting Group



Lucy Brennan

Project Consultant, JMT Consulting Group

MIP Mastery: Using MIP's Import Functionality to Save Time and Increase Efficiency

🕒 11:30am - 12:10pm, Apr 11

Speaker:



Dennis Guiney

Technical Specialist, JMT Consulting Group

Intacct Fundamentals: What Are Your Fixed Asset Choices with Intacct?

🕒 11:30am - 12:10pm, Apr 11

Speaker:



Dagi Stanton

Project Consultant, JMT Consulting Group

Intacct Mastery: Platform Tools: Advanced Allocations

🕒 11:30am - 12:10pm, Apr 11

Speaker:



John Tiso

Client Support Manager, JMT Consulting Group

Financial Leadership: Data Privacy and Data Security in the Age of the Data Breach -- What Everyone Needs to Know and Do Today

🕒 11:30am - 12:10pm, Apr 11

In this session, Jon will define what constitutes personal and sensitive information, also known as PII, as well as discuss recent statistics to provide some context for this session. He will then cover a general overview of some laws and regulations related to the collection of PII, including first steps as well as some best practices for preventing data breaches. Other data breach scenarios will also be discussed.

Speaker:



Jon Dartley, Ph.D

Counsel, Perlman + Perlman, LLP

12:20pm

Lunch

🕒 12:20pm - 1:15pm, Apr 11

1:20pm

MIP Fundamentals: Relieve Your Budget Headaches -- MIP Budget Tips & Tricks

🕒 1:20pm - 2:10pm, Apr 11

Speaker:



Steve Roese

Project Consultant, JMT Consulting Group

MIP Mastery: Allocate Costs Using Expenses as the Basis to Calculate the Distribution

🕒 1:20pm - 2:10pm, Apr 11

Speaker:



Shazeeda Teekah

Project Manager, JMT Consulting Group

Intacct Fundamentals: Intacct, New and Improved - Highlights of Product Enhancements

🕒 1:20pm - 2:10pm, Apr 11

Speaker:



Dagi Stanton

Project Consultant, JMT Consulting Group

Intacct Mastery: Purchasing with Spend Management

🕒 1:20pm - 2:10pm, Apr 11

Speaker:



Linda Pinion

Principal Sales Engineer, Intacct

Financial Leadership: What Nonprofits Need to Know to Avoid Costly Legal Mistakes in the Workplace: Top 10 Do's and Don'ts for 2018

🕒 1:20pm - 2:10pm, Apr 11

Speaker:



Lisa Brauner

Partner, Perlman+Perlman

● 2:10pm

Break

🕒 2:10pm - 2:20pm, Apr 11

● 2:20pm

MIP Fundamentals: Learn How to Modify Basic General Ledger Reporting (Hands On)

🕒 2:20pm - 3:30pm, Apr 11

📍 Weatherly

Speaker:



Shazeeda Teekah

Project Manager, JMT Consulting Group

MIP Mastery: Requisitions and Purchase Orders in Abila MIP

🕒 2:20pm - 3:30pm, Apr 11

Speaker:



Wes Dubay

Senior Sales Engineer, Abila

Intacct Fundamentals: Easy to Use Report Writer Wizards, Magic or Myth?

🕒 2:20pm - 3:30pm, Apr 11

Speaker:



Geoff Hearn

Project Consultant, JMT Consulting Group

Intacct Mastery: Save Time with Import Templates (Hands On)

🕒 2:20pm - 3:30pm, Apr 11

Speaker:



Dagi Stanton

Project Consultant, JMT Consulting Group

Financial Leadership: How to Survive a Government Audit

🕒 2:20pm - 3:30pm, Apr 11

Speaker:



Ken Cerini

Managing Partner, Cerini & Associates

3:30pm

Break

🕒 3:30pm - 4:00pm, Apr 11

4:00pm

MIP Fundamentals: MIP Advance - New and Improved

🕒 4:00pm - 4:50pm, Apr 11

Speaker:



Dagi Stanton

Project Consultant, JMT Consulting Group

MIP Mastery: Advanced Budgeting, Which Solution Works for Your Organization?

🕒 4:00pm - 4:50pm, Apr 11

Speaker:



Steve Roese

Project Consultant, JMT Consulting Group



Zachary Griggs

FP&A Practice Manager, JMT Consulting Group

Intacct Fundamentals: Approval Workflows for GL, AP and T&E

🕒 4:00pm - 4:50pm, Apr 11

Speaker:



John Tiso

Client Support Manager, JMT Consulting Group

Intacct Mastery: Optimizing Your Intacct Software

🕒 4:00pm - 4:50pm, Apr 11

Speaker:



Geoff Hearn

Project Consultant, JMT Consulting Group

Financial Leadership: Tax Reform - The Effect on Nonprofits

🕒 4:00pm - 4:50pm, Apr 11

The 2017 Tax Cuts and Jobs Act fundamentally changes US tax law affecting all sectors of the U.S. economy, including all types of nonprofits. Whether your organization is a donor-driven charity, a private foundation, trade association, the effects facing your nonprofit are the most impactful the industry has seen in over 30 years. Participants will learn what the 2017 tax legislation means for their organization and understand the impact on nonprofit organizations.

Speaker:



Matt Becker

Director, Nonprofit and Healthcare Practice, BDO

● 5:30pm

Cocktail Hour

🕒 5:30pm - 7:30pm, Apr 11

Sponsored by

sage Intacct

Thu, Apr 12, 2018

● 7:30am

Breakfast

🕒 7:30am - 8:30am, Apr 12

● 9:00am

Efficiencies of Using Microix PO/Requisitions Module with MIP

🕒 9:00am - 9:50am, Apr 12

Speaker:



Steve Roese

Project Consultant, JMT Consulting Group

MIP Security Overview with View into MIP System Logs and Alerts

🕒 9:00am - 9:50am, Apr 12

Speaker:



Dennis Guiney

Technical Specialist, JMT Consulting Group

Ensure that Accounts Payable and Accounts Receivable Subledgers are Balanced

🕒 9:00am - 9:50am, Apr 12

Speaker:



Shazeeda Teekah

Project Manager, JMT Consulting Group

Coming Soon -- the All New Sage Intacct Report Writer

🕒 9:00am - 9:50am, Apr 12

Speaker:



Linda Pinion

Principal Sales Engineer, Intacct

● 10:00am

The Benefits of MIP's HR Suite with Payroll Integration

🕒 10:00am - 11:10am, Apr 12

📍 Weatherly

Speaker:



Wes Dubay

Senior Sales Engineer, Abila

Automating the Entire Invoice-to-Payment Cycle: Extending the Function of Your Abila MIP System

🕒 10:00am - 11:10am, Apr 12

Speaker:



Brian Edgmon

Digital Marketing Manager, ACOM

Build a Better Dashboard - Hands-On

🕒 10:00am - 11:10am, Apr 12

This is a hands-on session, please bring your own laptop to participate.

Speaker:



Dagi Stanton

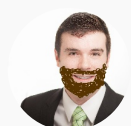
Project Consultant, JMT Consulting Group

Graphing the Change -- Hands-On

🕒 10:00am - 11:10am, Apr 12

Learn about the power of graphing in Intacct

Speaker:



Geoff Hearn

Project Consultant, JMT Consulting Group

11:30am

Tips & Tricks with MIP to Help You Work More Efficiently

🕒 11:30am - 12:20pm, Apr 12

Speaker:



Wes Dubay

Senior Sales Engineer, Abila

Reporting on Non-Financial Data Using User-Defined Fields

🕒 11:30am - 12:20pm, Apr 12

Speaker:



Shazeeda Teekah

Project Manager, JMT Consulting Group

AP Workbench -- Pay Bills More Efficiently

🕒 11:30am - 12:20pm, Apr 12

Speaker:



Linda Pinion

Principal Sales Engineer, Intacct

Advanced Budgeting & Planning With Adaptive Insights

🕒 11:30am - 12:20pm, Apr 12

Speaker:



Zachary Griggs

FP&A Practice Manager, JMT Consulting Group

12:20pm

Lunch

🕒 12:20pm - 1:20pm, Apr 12

1:20pm

Expenses Are Rising -- How Leading Nonprofits Have Become More Efficient with AP Automation

🕒 1:20pm - 2:10pm, Apr 12

Technology is transforming the way nonprofits fulfill their mission. Leading nonprofit finance teams are finding that process efficiency saves time and money, enabling them to be more strategic.

Recently released data shows that nonprofit expenses are on a steady incline, impacting the funding future.

At AvidXchange, we're revolutionizing the way that nonprofits control costs with AP and payment automation.

Join us for an interactive session with Pamela Klein, Nonprofit Sales Manager, and Justin Morrow, Senior Product Marketing Manager, as they discuss:

- The current state of the nonprofit landscape
- Customer insights around efficiencies gained with AP automation and payments
- How going paperless with AP not only helps the environment but also is a key internal control

Speaker:



Brittany Shelley

Partner Marketing Manager, AvidXchange

Saving Time & Money by Using the MIP EFT and Scheduler Modules

🕒 1:20pm - 2:10pm, Apr 12

Speaker:



Steve Roese

Project Consultant, JMT Consulting Group

You Say You Want an Integration?

🕒 1:20pm - 2:10pm, Apr 12

Speaker:



Scott Hollrah

Managing Partner, Venn Technologies

Enjoy a Seamless Month-end & Year-End Close

🕒 1:20pm - 2:10pm, Apr 12

Speaker:



John Tiso

Client Support Manager, JMT Consulting Group

● 2:20pm

Take a Dive into MIP Accrual-Based Modules

🕒 2:20pm - 3:30pm, Apr 12

Speaker:



Wes Dubay

Senior Sales Engineer, Abila

iRecruit Session

🕒 2:20pm - 3:30pm, Apr 12

Speaker:



Brian Kelly
iRecruit

Get to Know the New Sage Intacct User Interface

🕒 2:20pm - 3:30pm, Apr 12

Speaker:



Linda Pinion
Principal Sales Engineer, Intacct

Ad Hoc Reporting in AP and AR - Hands-On

🕒 2:20pm - 3:30pm, Apr 12

Please bring your laptop to participate in this Hands-On session.

Speaker:



John Tiso
Client Support Manager, JMT Consulting Group

● 4:00pm

Extreme Workflows with Sage Intacct Purchasing

🕒 4:00pm - 4:50pm, Apr 12

Speaker:



John Tiso
Client Support Manager, JMT Consulting Group

Why Forward-Thinking Nonprofits Are Automating Expense Management

🕒 4:00pm - 4:50pm, Apr 12