2024 | BOSTON
INNOVATE
JMT CONSULTING
MAY 1-3, 2024

~ AGENDA ~

INNOVATE 2024

Wednesday
May 1, 2024

- Registration
- Pre-Con Sessions
- Welcome Reception
- Sponsor Booths Open

Thursday
May 2, 2024

- Breakfast
- Welcome
- Day One Keynote
- Breakout Sessions
- Lunch
- Breakout Sessions
- Dinner & Outing

Friday
May 3, 2024

- Breakfast
- Day Two Keynote
- Breakout Sessions
- Lunch
- Lunch Presentation

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JMT CONSULTING
THE EXPERTS IN MISSION-DRIVEN NONPROFIT FINANCE

Sage Partner

Innovate 2024 Agenda

Wednesday, May 1st Pre-Conference Workshops – Sage Intacct User Training - Lunch Provided	
9:00 – 9:30 AM	Registration for Pre-Conference (space is limited)
9:30 AM – 4:30 PM	Sage Intacct Masterclass: Unleashing the Power of Basic and Intermediate Skills Training
9:30 AM – 4:30 PM	Sage Intacct Insights Elevation: Harnessing Advanced Reporting and Dashboards Mastery
10:00 AM - 3:00 PM	Budgeting Brilliance: Sage Intacct Planning Unleashed

Wednesday, May 1st Welcome to Innovate!	
6:00 – 8:00 PM	Registration, Welcome Reception, Sponsor Booths Open

Thursday, May 2nd Conference Agenda				
~ Learning Lab Open by Appointment ~ Davidoff Strategy Consultations by Appointment ~				
7:00 – 8:00 AM	Breakfast			
8:00 – 8:15 AM	Welcome by Founder & CEO Jacqueline M. Tiso			
8:15 – 9:30 AM	Keynote presented by Sage - Aaron Harris, Chief Technology Officer			
	Sage Intacct **Track 1**	Leadership/Third Party **Track 2**	MIP Accounting **Track 3**	Potpourri **Track 4**
9:45 – 10:45 AM	Intacct Unveiled: A Deep Dive into the Latest Enhancements and Tips for Nonprofits (1A)	Exploring Financial Planning and Analysis: Best Practices Unveiled (2A)*	Streamlining Operations: Embracing MIP's Import Functionality for Peak Efficiency (3H)	Conquering Depreciation: Navigating the Sage Intacct Fixed Assets Galaxy (1H)*
10:45 – 11:00 AM	Break			
11:00 – 12:00 NOON	Financial Reporting and Dashboards in Sage Intacct: Unleashing the Power of Customization (1B)	Seamless Transition: Looking at New Accounting Software (2B)	The Art of Strategic Reporting: Unveiling MIP Reports Overview (3C)	Money Management for CFOs - (2E)*
12:00 – 1:30 PM	Lunch and Learn: Live Podcast - The Nonprofit Show with Julia Patrick 12:30-1:00 PM 1:00-1:30 PM Lunch Speaker David Greco - Ukraine: Lessons in Innovation - How Lessons Learned in the US Nonprofit Sector Are Being Applied in Ukraine - Introduction by Arreva			
1:40 – 2:40 PM	Overview to Sage Intacct Planning SIP (1C)	Negotiating the Regulatory Landscape: Nonprofit Compliance Essentials (2C)	Strengthening MIP Financial Reports: Crafting Internal and Audit Reports (3D)	Acing Intacct Importing: Unleashing Templates and Best Practices (1G)*
2:50 – 3:50 PM	Beyond Numbers: The Real Power of Intuitive Reporting (1D)	Adapting to Change: Maneuvering New Accounting Reporting Requirements for Nonprofits (2D)*	Cracking the MIP Budget Module Code: Tips and Tricks Unveiled (3E)	Exploring Financial Planning and Analysis: Best Practices Unveiled (2A)*
3:50 – 4:05 PM	Break			

4:05 – 5:05 PM	Dynamic Allocations Demystified: Real-world Efficiency for Time and Cost Saving (1E)*	Money Management for CFOs (2E)	Software Showcase with Sage and Martus	Adapting to Change: Maneuvering New Accounting Reporting Requirements for Nonprofits (2D)*
5:15 – 6:00 PM	Nonprofit Industry Trends panel discussion hosted by Julia Patrick, American Nonprofit Academy - Introduction by Martus			
6:30 – 9:00 PM	Buffet and Cocktails + Rodman for Children Charity Event - The Tower - Sponsored by Sage			

Friday, May 3rd Conference Agenda				
~ Learning Lab Open by Appointment ~ Davidoff Strategy Consultations by Appointment ~				
7:00 – 8:00 AM	Breakfast			
8:00 – 9:00 AM	Keynote - Jacki Davidoff - Developing Yourself as a Leader - Introduction by BILL			
	Sage Intacct **Track 1**	Leadership/Third Party **Track 2**	MIP Accounting **Track 3**	Potpourri **Track 4**
9:15 – 10:15 AM	How to Make the Monthly Close Pain Free - Presented by Sage (1F)	Innovation with BILL and Arreva (2F) Women Leading the Future: Navigating Finance and Technology - BILL The Biggest Challenge Facing Nonprofits Today: Executable Strategies for Increasing Donor Acquisition - ARREVA	Ascending MIP Advanced Allocations: Power to Allocate Indirect Costs (3F)	Mission: Light Speed Integration (4A)
10:25 – 11:25 AM	Acing Intacct Importing: Unleashing Templates and Best Practices (1G)*	Guardians of Data: Finance Professionals Unveiling Data Privacy, Protection, and Security (2G)	Fortifying Your Financial Fortress: MIP Security Mastery (3G)	Dynamic Allocations Demystified: Real-world Efficiency for Time and Cost Saving (1E)*
11:35 - 12:35 PM	Conquering Depreciation: Navigating the Sage Intacct Fixed Assets Galaxy (1H)*	Leadership From the Inside Out: A Guide for Women with Jacki Davidoff (2H)	Mastering MIP: Essential Skills Unleashed (3A)	Software Showcase with ADP, Velixo, and Venn
12:45 – 1:45 PM	Lunch			
1:45 – 2:30 PM	Closing Session: Raffle Prizes, Closing Remarks, etc.			
	Agenda is subject to change.			

WEDNESDAY, MAY 1, 2024

Pre-Conference Workshops

Sage Intacct Masterclass: Unleashing the Power of Basic and Intermediate Skills Training

For beginning to intermediate level users (or those who would like a refresher course), we'll spend the day going above and beyond what is typically covered during Sage Intacct Core Training. We'll dive deeper into modules like General Ledger, Company, Accounts Payable, Accounts Receivable, Cash Management, and Reports. You'll come away with tips and tricks to help you get additional value out of Sage Intacct. Presented and facilitated by Megan Madden and Adam Beyer from JMT Consulting. You will learn:

Company

- Personal Preferences; Checklists; QA

General Ledger

- Reporting books default settings
- Trial balance report enhancements
- Dimension balances report options
- QA

Accounts Payable

- Vendors – additional options
- AP automation
- Credits – adjustments vs negative AP Bills
- How to fix:
  - Credit memos
  - Adjustments – debit or credit
  - Incorrectly applied payments
- QA

Accounts Receivable

- Customers – additional options
- Customized invoices
- Overpayments
- Advances
- Importing payments
- How to fix:
  - Incorrectly applied advances
  - Credit memos incorrectly applied
  - Reverse deposits – cause and effects

- QA

Cash Management

- Cash Receipts
- Funds Transfer
- Service charges and interest
- Credit Card tracking using Cash Management
- QA

Reports

- Custom Reports
    - Data Sources
    - Fields
    - Custom calculations
    - Customizing
    - Saving and Running Custom Reports
- Financial Reports
    - New Enhancements
    - Dimension structure vs Account structure reports
    - Report Groupings
    - Scheduling reports
    - Security and Reports
- QA
- Dashboards
    - Overview
    - Dashboard components
    - Enhancements
    - QA

Sage Intacct Insights Elevation: Harnessing Advanced Reporting and Dashboards Mastery

For more advanced users, we'll spend the day learning how to produce powerful reports and dashboards. You'll learn not only how to help your leadership make better, faster, and more informed decisions, but also display your data in ways to make your day-to-day operations more effective. You'll learn how to easily display key performance indicators, graphical representations of data, as well as your financial and operational reports. You'll leave the session armed with powerful knowledge you'll be able to implement in your organization immediately. Presented and facilitated by Dagi Stanton and Taylor Bost from JMT Consulting. You will learn:

- Grouping Dimensions to be used as filters or dimension structures.
- The difference between dimension structures and account structure type reports.
- Financial report "extras" such as notations, column spacing, etc.

Budgeting Brilliance: Sage Intacct Planning Unleashed

Join our Budgeting & Planning experts on the journey of creating budgets that are designed with ease, include a wealth of knowledge, and drive the solutions that organizations are looking for in budgeting using Sage Intacct Planning. This session is beneficial for novices or well-versed finance professionals in the budgeting world. Presented by Dan Holcomb and Declan Lawlor from JMT Consulting. You will learn:

- How to create a more collaborative experience by working with data and sharing information.
- How to build what-if scenarios and complete a comparative analysis with Forecast and Budgets.
- Model Builds and leveraging calculations to derive data that feeds directly back into the budget.
- Experience the ability to pull and push data to Intacct.
- Learn to Design hierarchies that fit the needs of your organizations budgeting needs.
- Tips & Tricks to have a more successful budgeting season.
- Working with Dashboards and Sheets to visualize your data for different audiences.
- Understanding Statistical data and how it can drive decision making based on the results produced via Modeling.
- Additional insights via discussion, as well as Q & A.

THURSDAY, MAY 2, 2024

Welcome by Founder and CEO Jacqueline M. Tiso

- Introduction by Sage

Keynote by Aaron Harris, CTO Sage

- Introduction by JMT

Meet Aaron Harris, Sage's visionary Chief Technology Officer, steering emerging tech investments, AI-powered innovations, and driving the company's SaaS excellence. Aaron's passion lies in powering the accounting industry forward with transformative technology and building the next generation of diverse tech talent.

Keynote: The Value of Continuous Accounting

In this tech-focused keynote, Sage CTO Aaron Harris explains the value of continuous accounting, which represents the evolution from periodic financial reporting to an ongoing, real-time process. Continuous accounting uses artificial intelligence (AI) and automation to integrate financial recording and analysis into daily operations. This ensures financial data is always current and actionable. For finance professionals, this offers several advantages:

- Enhanced decision-making: Access to real-time financial data enables better-informed and timely decisions, which is critical in today's fast-paced business environment.
- Increased efficiency: Automation reduces manual tasks, allowing finance teams to focus on strategic activities and analysis.
- Improved accuracy and compliance: Continuous monitoring and AI-driven anomaly detection help to maintain accuracy and ensure compliance with financial regulations.

By moving to continuous accounting, finance leaders can steer businesses with greater agility and foresight.

Lunch and Learn 12 noon - 1:30 PM

- Live Podcast: "The Nonprofit Show" hosted by Julia Patrick 12:30 - 1:00 PM
- Lunch Speaker David Greco: Ukraine: Lessons in Innovation 1:00 - 1:30 PM

David Greco, President & CEO of Social Sector Partners

- Introduction by Arreva

Ukraine: Lessons in Innovation
How Lessons Learned in the US Nonprofit Sector Are Being Applied in Ukraine
In this engaging and interactive session, David Greco, a nationally recognized nonprofit leader with nearly 30 years in nonprofit finance and leadership roles, will share how some of the US nonprofit sector's best practices are helping to save lives by providing humanitarian aid to people and communities impacted by the Russian invasion of Ukraine. The saying that "necessity is the mother of invention" has never been truer than in Ukraine. Outmanned, outgunned, and outspent, Ukraine managed to repel the Russian's attempt to take Kyiv, recaptured occupied territory, and has fought a bigger adversary to a standstill. This was due in large part to an innovative and adaptive capacity – and it was not business innovators but social sector and community innovators that lead the charge.

- Understanding the US Nonprofit Sector: It is not about charity!
- We Know What Works (and we can prove it!)
- The Role of NGO's in Defending Ukraine
- Best Practices on the Ground (and Some Bad Best Practices too!)
- Think Money First!

David Greco is a nationally recognized nonprofit leader, speaker, and author on creating a more sustainable and effective social sector. Today David serves as President & CEO of Social Sector Partners helping nonprofits and funders better understand what it really costs for nonprofits to be sustainable and achieve long-term impact. Since May 2023, David has been volunteering in Ukraine helping people and communities that have been devastated by the full-scale Russian invasion and on-going atrocities. He is providing humanitarian aid and medical supplies to combat medics and front-line defenders as well as helping to rebuild schools, homes, and communities damaged by shelling, flooding, and other acts of war.

Learning Lab

By appointment only. Want to learn more about how to use your existing finance software more effectively? Take this opportunity to work through real-world scenarios with a JMT consultant.

Sage Intacct Track 1

Intacct Unveiled: A Deep Dive into the Latest Enhancements and Tips for Nonprofits (1A)
Review of all the Intacct enhancements for the past year specific to the nonprofit sector. Presented by Dagi Stanton from JMT Consulting. You will learn:

- Enhancements to current functionality
- New features for nonprofits

Financial Reporting and Dashboards in Sage Intacct: Unleashing the Power of Customization (1B)
Sage Intacct offers a variety of financial reports and dashboards that can be customized to meet the specific needs of nonprofit organizations. This session will provide you with an overview of the Sage Intacct financial reporting capabilities. Attendees will learn about and how to customize the different types of financial reports and dashboards that can be generated in Sage Intacct. Presented by Dagi Stanton from JMT Consulting and Rob Caluori, CFO Westchester Library System. You will learn:

- The different types of financial reports that can be generated in Sage Intacct, including:
    - Balance sheet, income statement, statement of cash flows, statement of changes in net assets, grant reports, program reports, fund reports
- How to customize financial reports in Sage Intacct
- How to create dashboards in Sage Intacct
- Best practices for using Sage Intacct financial reports
- Help your leadership make better, faster, and more informed decisions
- Display your data in ways to make your day-to-day operations more effective
- Display key performance indicators, graphical representations of data, as well as your financial and operational reports

Overview to Sage Intacct Planning (SIP) (1C)
Looking to add Sage Intacct Planning (SIP) to your current Intacct software? Already have SIP and looking to gain additional insights, tips, and tricks on how to make the most of it? SIP helps finance teams collaborate, plan, budget, and forecast more efficiently and effectively. SIP integrates seamlessly with Sage Intacct Core Financials, so you can be sure that your data is always accurate and up-to-date. Presented by Dan Holcomb and Declan Lawlor from JMT Consulting. You will learn more about the benefits of using SIP:

- Improved accuracy: Help eliminate errors by automating data entry and calculations.
- Increased efficiency: Save time and money by streamlining your planning and budgeting process.
- Better decision-making: SIP provides you with the information you need to make better decisions about your organization.
- Increased transparency: SIP can help to improve communication and collaboration between different parts of your organization.

Beyond Numbers: The Real Power of Intuitive Reporting (1D)
Step into a world where dynamic dashboards act as gateways to a treasure trove of strategic information. Learn how reporting transforms beyond mere numbers, weaving a powerful narrative that not only informs decision-making but also shapes the future of your endeavors. Gain firsthand insights from an organization successfully navigating this path today. Join us for a session that unveils the true

potential of strategic dashboards in your Sage Intacct journey. Presented by John Tiso from JMT and Walt Hicks from Sage.

Dynamic Allocations Demystified: Real-world Efficiency for Time and Cost Saving (1E)
Join us for this real-world example of how dynamic allocations can save time and money. Presented by Lucy Brennan and Shazeeda Teekah from JMT Consulting along with Jackie Mottola, Controller - MADD. You will learn:

- How to set up a dynamic allocation
- How to generate a dynamic allocation
- How to view and analyze the results of the allocation

Leadership/Third Party Track 2

Exploring Financial Planning and Analysis: Best Practices Unveiled (2A)
Presented by Taylor MacDonald - Martus, along with Dan Holcomb and Bob Martin - JMT Consulting. While budgeting is an annual process, further planning and forecasting are essential for any nonprofit organization, regardless of size or budget. After the budget is set, planning and forecasting models help nonprofit management plan for contingencies so they can make informed decisions about their resources, programs, and impact. This session will provide you with an overview of the best practices in budgeting, planning, and forecasting, including:

- How to develop a strategic financial plan
- How to create accurate and timely forecasts
- How to analyze financial performance
- How to communicate financial information to stakeholders
- How to use budgeting and planning to improve decision-making
- Overview of budgeting and planning tools (SIP, Vena, and Martus)

Seamless Transition: Looking at New Accounting Software (2B)
Thinking it's time to upgrade from your current accounting software? Join the discussion of the decision-making processes, best practices, perils, and benefits. Learn about the key steps involved in the migration, as well as the best practices for ensuring a successful outcome. Presented by Jacqueline Tiso from JMT Consulting. You will learn:

- The benefits of migrating to a new accounting software
- The key steps involved in the migration process
- Best practices for ensuring a successful migration
- How to manage the change management process
- How to get the most out of your investment

Negotiating the Regulatory Landscape: Nonprofit Compliance Essentials (2C)
Presented by David Goldstein, Chair - Nonprofit/Tax Exempt/Religious Organizations Practice Group, Certilman Balin Adler & Hyman LLP.
Nonprofit organizations are subject to extensive governance and compliance requirements, both at the federal and state levels. It is important for finance professionals working for nonprofits to understand these requirements in order to be able to support their organization's compliance. This session will provide you with an overview of some key aspects of nonprofit governance and compliance. Attendees

will learn about the different types of requirements that nonprofits face, as well as best practices for ensuring compliance. You will learn fundamentals in the following areas:

- Requirements and best practices relating to the flow of information to the organization's officers and to the Board of Directors;
- Federal and state annual filing and reporting requirements (including the IRS Form 990 filing);
- Governance structure and best practices;
- Conflicts of interest and related party transactions;
- Whistleblower protections and requirements;
- Risks of non-compliance, including regulatory risks, regulatory enforcement actions, and breach of fiduciary duty litigation;
- Governance and compliance dos and don'ts, and traps for the unwary

Adapting to Change: Maneuvering New Accounting Reporting Requirements for Nonprofits (2D)
Presented by Ken Cerini, CPA and Managing Partner, Cerini and Associates, LLP

- An overview of new accounting rules and reporting changes for nonprofits.

Money Management for CFOs (2E)
Presented by Jeff Young, Senior Vice President, FirstBank; Matt Thompson, Financial Advisor & Portfolio Management Director, Morgan Stanley; Christian Templeman, Financial Advisor, Morgan Stanley
Designed for CFOs, this session brings together experts in the industry to discuss:

- Best practices in banking and investing for nonprofit organizations
- General investing strategies
- How to help your staff invest in their own future

MIP Accounting Services Track 3

Streamlining Operations: Embracing MIP's Import Functionality for Peak Efficiency (3H)
Overview of MIPs' Import functionality. Presented by Dennis Guiney. You will learn:

- How to identify areas in your workflow that would be better executed with importing
- Run a basic import into MIP
- Review MIP error messages and modify data before and after importing

The Art of Strategic Reporting: Unveiling MIP Reports Overview (3C)
Leveraging basic reporting features to increase productivity. Presented by Lucy Brennan from JMT Consulting. You will learn:

- How to customize predefined reports
- Basic reporting features
- How to utilize the program manager

Strengthening MIP Financial Reports: Crafting Internal and Audit Reports (3D)
Learn how to produce your internal departmental reports as well as audit reports within MIP. Presented by Dagi Stanton from JMT Consulting. You will learn:

- Creating a report outline/format
- Grouping accounts to also use segment substitution
- Editing/changing existing reports

Cracking the MIP Budget Module Code: Tips and Tricks Unveiled (3E)
MIP Budgets Tips and Tricks. Presented by Dennis Guiney from JMT Consulting. You will learn:

- Manual entry of budget information into MIP
- How to create budget worksheets in various formats
- How to Copy/Paste data from Excel into a budget worksheet and transfer to accounting

Software Showcase

Learn the latest in nonprofit accounting financial software from the experts. Join Sage and Martus as they showcase their offerings. Track 3, 4:05 – 5:05 PM

Potpourri Track 4

This track features repeats of our most popular sessions and more!

Day 1 Closing Session

Nonprofit Industry Trends Panel Discussion 5:15 - 6:00 PM

- Hosted by Julia Patrick - CEO and Founder, American Nonprofit Academy
    - Introduction by Martus

FRIDAY, MAY 3, 2024

Welcome by Founder and CEO Jacqueline M. Tiso

Keynote by Jacki Davidoff, Principal of Davidoff Strategy

- Introduction by BILL

Keynote - Developing Yourself as a Leader: Articulating Your Vision of Contribution
Do you see possibilities for greater contribution as a leader? This interactive workshop helps each attendee explore their capacity for personal and professional development in order to be of greater service to the missions, departments, and organizations they lead.

Based on years of consulting, training, and coaching with social sector leaders and organizations nationally, Jacki Davidoff, Principal of Davidoff Strategy, and Executive Leadership Coach, shares concepts that invite personal reflection and learning through small and large group exercises. Each participant will be guided to define a vision of the next level of their effectiveness and leadership within their organization – and come to recognize they have much more capacity than they know. This work involves understanding we each have internal, habitual ways we think and act - - our “internal system” - - and that our missions call us to develop skills to intentionally disrupt our “systems” and make choices as Mission-Drivers.

Concepts include: applying systems theory to individual and organizational growth, risk-taking, self-awareness, and addressing gaps and opportunities for greater personal and professional contribution.

Attendees will:

- Develop a clear vision for the next level of their leadership and contribution as Mission-Drivers.
- Identify blocks and barriers to their effectiveness as well as facilitators of their effectiveness.
- Tune into and use their emotions to drive positive outcomes including building relationships with colleagues and learning to address conflict in a responsible way to move their organization forward.

Learning Lab

By appointment only. Want to learn more about how to use your existing finance software more effectively? Take this opportunity to work through real-world scenarios with a JMT consultant.

Sage Intacct Track 1

How to Make the Monthly Close Pain Free - Presented by Sage (1F)
Presented by Andrea Small, Sr. Product Manager - Sage Intacct, Inc.
In this session, we will delve into the intricacies of streamlining the monthly close process for nonprofit organizations. The monthly close is a crucial aspect of financial management, ensuring accuracy, compliance, and transparency in reporting. However, it can often be a daunting and time-consuming task, especially for nonprofits with limited resources. This session aims to provide practical strategies and best practices to make the monthly close a smoother and less burdensome process.

Acing Intacct Importing: Unleashing Templates and Best Practices (1G)
Learn about the Intacct importing templates. Presented by Dennis Guiney from JMT Consulting. You will learn:

- Review Intacct COA templates
- Review Intacct General Ledger transaction templates
- Review Intacct best practices, reading error reports, etc. when importing

Conquering Depreciation: Navigating the Sage Intacct Fixed Assets Galaxy (1H)
Learn how to depreciate fixed assets for the life of an asset. Review the Fixed Asset Dashboard to get a summary of your assets using multiple Fixed assets reports that are standard with the system. Presented by Walt Hicks from Sage and Adam Beyer from JMT Consulting. You will learn:

- Review asset classes like equipment or furniture and fixtures with their varying depreciation methods
- Review assets and dimensions they are coded to for calculating depreciation. Learn about depreciation methods (SL)
- Review asset import and validating data requirements

Leadership/Third Party Track 2

Innovation with BILL and Arreva (2F)
Women Leading the Future: Navigating Finance and Technology - Presented by BILL
Join us for an insightful session as we explore the intersection of finance, technology, and female leadership. Our panel of accomplished women in finance will share their career journeys, insights on

leadership, and perspectives on leveraging technology to address challenges and opportunities in the industry.

The Biggest Challenge Facing Nonprofits Today: Executable Strategies for Increasing Donor Acquisition - Presented by ARREVA
Increasing Donor Acquisition: successful new ideas that are helping overcome the nonprofit industry's biggest challenge. In this highly interactive session, you'll learn strategies for increasing donor acquisition and how to future-proof your fundraising and ensure long-term sustainability and success in achieving your mission. Features David Blyer, President & CEO of Arreva, and Chris Fink, COO of Arreva.

Guardians of Data: Finance Professionals Unveiling Data Privacy, Protection, and Security (2G)
Presented by Bart Holzer, Chief Information Security Officer - Affinity Technology Partners
Finance professionals are responsible for managing some of the most sensitive data in the world. From customer financial information to employee payroll data, finance professionals need to take steps to protect this data from unauthorized access, use, or disclosure. This session will provide finance professionals with an overview of data privacy, protection, and security. Attendees will learn about the latest threats to data security, as well as the best practices for protecting data. You will learn:

- The different types of data privacy and protection laws and regulations
- The latest threats to data security
- Best practices for protecting data from unauthorized access, use, or disclosure
- How to respond to a data breach

Leadership From the Inside Out: A Guide for Women with Jacki Davidoff (2H)
Do you see possibilities for yourself in your professional life but aren't sure how to go about "getting there?" This workshop helps each participant explore their capacity for personal and professional development. You'll learn key skills of social and emotional intelligence that lead to self-awareness, growth, nourishment, and greater personal and professional satisfaction. Participants will discover possibilities for greater satisfaction and authorship of their life. We'll provide guided exercises and small group activities that lead each woman to define a vision of who they seek to become. They'll also have opportunities to support each other towards their visions.

MIP Accounting Services Track 3

Ascending MIP Advanced Allocations: Power to Allocate Indirect Costs (3F)
Use MIP's allocations to allocate Indirect Cost. Presented by Shazeeda Teekah and Lucy Brennan from JMT Consulting. You will learn:

- Setting up allocation codes
- Processing allocations
- Review allocation results

Fortifying Your Financial Fortress: MIP Security Mastery (3G)
In this session you will learn about the levels of security in the MIP application, how to review the MIP system logs, and the functionality of the MIP Advanced Security Module, and Alerts. Presented by Dagi Stanton from JMT Consulting. You will learn:

- How to create a user in MIP and apply permissions for specific user access
- How to restrict a user's access based on MIP segment codes
- How to review the MIP Audit Logs and set up Alerts within the system

Mastering MIP: Essential Skills Unleashed (3A)
Introduction for new users as well as long time users. Presented by Lucy Brennan from JMT Consulting. You will learn:

- Set and customize workstation settings, navigate through MIP and review your organization's setup.
- Hidden functions and how to use them including default coding
- Distribution Codes and how they are used
- Basics of transaction entries
- Overview of AP
- Overview of AR Billing

Potpourri Track 4

This track features repeats of our most popular sessions and more!

Mission: Light Speed Integration (4A)
There's not enough time in the day. We've all had that thought at one point or another. But what if the problem wasn't having enough time? What if the problem was speed? Join this session to learn more about integrating programs and systems together so they can communicate directly. In other words - at the speed of light! Presented by John Tiso from JMT Consulting and Jigar Darji from Sage.

Software Showcase

Learn the latest in nonprofit accounting financial software from the experts. Join ADP, Velixo, and Venn as they showcase their offerings. Track 4, 11:35 AM – 12:35 PM

Lunch and Closing Session - Raffle Prizes, Closing Remarks

- Marty Bird from JMT Consulting

*Schedule is subject to change.