

SERVE

2022 Wipfli National Training Conference

Onsite conference schedule

 Print Schedule

Conference concierge! – Would you like assistance customizing your training experience? We have sessions for nonprofits and governments to choose from and would be happy to help you choose the sessions to best meet your development needs. Please send an email to gfponline@wipfli.com with the subject “Conference concierge,” and you will be contacted to help you build a conference schedule that is personalized for you.

Did you know there are special preconferences before the conference? Learn more:
[OMB's Uniform Guidance regulations overview preconference](#)
[Head Start/Early Head Start regulations overview preconference](#)
[Organizational change management: Building change competency overview preconference](#)

Monday, July 11, 2022

Monday Morning Full Sessions (attend one)

8:30 a.m.-5:00 p.m.

Head Start/Early Head Start Regulations Overview (Preconference)

Date: 07/11/2022 8:30 a.m.-5:00 p.m.
History: Updated
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Specialized Knowledge
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director

Tracks: Boards and tribal councils; Head Start/Early Head Start
Type: Full
Level: Overview
Qualifies for Yellowbook?: Yes
Prerequisites: None
CPE Credits: 7
Trainers:

HS/EHS Program Staff



[Kate Atkins, MS](#)
Client Development Advisor

Learning Objectives:

1. Explore how the Head Start Act and the HSPPS impact each other.
2. Discuss the future of these regulations.
3. Share ideas, thoughts and best practices of ongoing leadership about these requirements.

Session Description:

The Head Start Act identifies pages of guidelines that HS/EHS programs need to follow to stay in compliance. When you are implementing the Head Start Act, there are numerous things to consider, including how decisions impact your program. In this overview, we will explore the Head Start Act and give you time to learn where to find information and dig into the details once you are back at the office. And since the Head Start Act goes hand in hand with the Head Start Program Performance Standards (HSPPS), we will explore the highlights of all of the HSPPS (45 CFR Parts 1301-1305). Our goal is to help you get comfortable with what HS/EHS programs need to follow to stay in compliance. We will pay special attention to the areas of:

- Administrative requirements (definitions, administrative limitations, non-federal match [a/k/a in-kind], following 45 CFR Part 75, recordkeeping)
- Power and functions (governing body, policy council, policy committees and administrative requirements)
- Program requirements overview (health, nutrition, ratios, ERSEA)
- Qualifications and wages (background check and minimum staff requirements)
- And time for your questions too!

 **PRINT**

8:30 a.m.-5:00 p.m.

OMB's Uniform Guidance Regulations Overview (Preconference)

Close Info ▲

Date: 07/11/2022 8:30 a.m.-5:00 p.m.
History: Updated
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Accounting (Governmental)
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 COO
 Clinic Leadership
 Finance Staff
 HR Director/Manager
 HR Staff
 HS/EHS Director/Manager
 HS/EHS Program Staff
 IT Director/Manager
 Program Director/Manager
 Quality Improvement Leader

Tracks: Financial, accounting and tax; Boards and tribal councils; Head Start/Early Head Start; Risk

Type: Full
Level: Overview
Qualifies for Yellowbook?: Yes
Prerequisites: None
CPE Credits: 7

Trainers:



[Denes Tobie, CPA](#)
Partner



[Katherine Eilers, CPA](#)
Senior Manager

Learning Objectives:

1. Explore the guidance and the various sections.
2. Review where to get answers in the regulation.
3. Identify areas for improvement back at the agency.

be a discussion of the general provisions and administrative requirements in 2 CFR Part 200 Uniform Guidance. We'll focus on these key areas:

- Standards for financial management systems and internal controls
- Procurement, property and equipment
- Reporting and record retention requirements

The cost principles cover the costs that a grant-funded program can charge to federal grant awards. General principles, allowable costs, unallowable costs and costs that require prior approval will be discussed. We'll also discuss certain selected items of cost. And we will give an overview of the audit requirements.

 PRINT

8:30 a.m.-5:00 p.m.

Organizational Change Management: Building Change Competency
(Preconference)

Close Info ▲

Date: 07/11/2022 8:30 a.m.-5:00 p.m.

History: New

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Business Management & Organization

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

COO

Clinic Leadership

HR Director/Manager

HS/EHS Director/Manager

IT Director/Manager

Program Director/Manager

Tracks: Performance improvement; Talent

Type: Full

Level: Intermediate

Qualifies for Yellowbook?: No

Prerequisites: Some leadership experience preferred

CPE Credits: 7

Trainers:



[Deron Kling](#)

Senior Manager



[Daniel Bashore, Ph.D.](#)

Consultant II

Learning Objectives:

1. Explore how reactions to change can impact future initiatives.
2. Discuss the process for change management that leaders can implement.
3. Share ideas, thoughts and best practices for tools and actions when implementing change in the agency.

Session Description:

Leaders, bring your team and join us for this one-day preconference session where together you will build skills and competencies around organizational change management. Taking these back to your organizations will help the transformation into a more “change agile” organization. Through a mix of both hands-on and instructional learning, you will explore and discuss the foundations in implementing effective change management efforts.

 PRINT

Monday Lunch

12 p.m.-1 p.m.

Connect with Wipfli Luncheon

Close Info ▲

Date: 07/11/2022 12 p.m.-1 p.m.

History: Updated

Experience: All (All levels of experience)

Tracks: Financial, accounting and tax; Boards and tribal councils; Health care -FQHC only; Head Start/Early

CEO/Executive Director
 CFO/Finance Director
 COO
 Clinic Leadership
 CSBG/Org Standard
 Finance Staff
 HR Director/Manager
 HR Staff
 HS/EHS Director/Manager
 HS/EHS Program Staff
 IT Director/Manager
 Program Director/Manager
 Providers, Nurses
 Quality Improvement Leader

Level: Overview

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: 0

Trainers:



[Brian Gaumont](#)

Principal

Learning Objectives:

N/A

Session Description:

Please join us for our Connect With Wipfli Lunch. A variety of complementary box lunches will be available. During this hour, we want to hear about your organization's success, issues and concerns. The dialogue created will provide insight and ideas on real solutions built around the success of people, process, technology and finances. Registration by July 5 is required to provide enough lunches for attendees.

PRINT

Tuesday, July 12, 2022

Tuesday Morning Full Session

8:30-12 p.m.

Opening Session

Close Info ▲

Date: 07/12/2022 8:30-12 p.m.

History: Updated

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: None

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

COO

Clinic Leadership

Finance Staff

HR Director/Manager

HR Staff

HS/EHS Director/Manager

HS/EHS Program Staff

Tracks: Financial, accounting and tax; Boards and tribal councils; Health care -FQHC only; Head Start/Early Head Start; Performance improvement; Risk; Technology; Talent

Type: Full

Level: Basic

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: 0

Trainers:

Learning Objectives:

Session Description:

Join us for an exciting welcome event!

 **PRINT**



Select a 1st and 2nd Afternoon Mini Session

Choose one session per time slot below

Tuesday 1st Afternoon Mini Sessions (attend one)

1:30-3:05 p.m.

CFO Roundtable: Hot Topic Issues to Discuss With Peers

Close Info ▲

Date: 07/12/2022 1:30-3:05 p.m.

History: New

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: None

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

COO

Finance Staff

Tracks: Financial, accounting and tax

Type: Mini

Level: Basic

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: 1.5

Trainers:



[Amanda Flohr, CPA](#)

Senior Manager



[Denes Tobie, CPA](#)

Partner



[Ciara Leahy, CPA](#)

Senior Manager, Audit

Learning Objectives:

1. Explore financial challenges.
2. Share best practices.
3. Identify areas of improvement to use back in the agency.

Session Description:

Please join us – and your peers – to discuss fiscal-focused hot topic issues. Together we will discuss what other organizations are doing in the face of these issues: cash flow projections, bank financing, allocation of grants, safeguarding assets and more.

 **PRINT**

1:30-3:05 p.m.

Financials for Non-Financial Leaders

Close Info ▲

Date: 07/12/2022 1:30-3:05 p.m.

History: New

Tracks: Financial, accounting and tax; Boards and tribal councils; Performance improvement

Applicable Audience: Board Member
 CEO/Executive Director
 COO
 Clinic Leadership
 HR Director/Manager
 HS/EHS Director/Manager
 HS/EHS Program Staff
 IT Director/Manager
 Program Director/Manager

Prerequisites: None
CPE Credits: 1.5
Trainers:



[Katherine Eilers, CPA](#)
 Senior Manager

Learning Objectives:

1. Explore financials – identify basic financial statements and classifications.
2. Discover where non-financial people struggle with financials.
3. Identify how to hold open discussions and ask questions.

Session Description:

Are you a self-identified non-financially savvy person? Then welcome to a session built just for you. If part of your current or future responsibilities is understanding the financial information of the agency, this session will give you easy-to-understand, practical suggestions for helping to learn agency financials. We will discuss the financials and explain the basics of financials and how to encourage questions and discussion at your agency to expand your understanding.

PRINT

1:30-3:05 p.m.

Situational Awareness in 2022

Close Info ▲

Date: 07/12/2022 1:30-3:05 p.m.
History: New
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Specialized Knowledge
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 COO
 Clinic Leadership
 Finance Staff
 HR Director/Manager
 HR Staff
 HS/EHS Director/Manager
 HS/EHS Program Staff
 IT Director/Manager
 Program Director/Manager

Tracks: Boards and tribal councils; Performance improvement; Risk; Talent
Type: Mini
Level: Basic
Qualifies for Yellowbook?: No
Prerequisites: None
CPE Credits: 1.5
Trainers:



[Andrew Hofstetter](#)
 Director, Organizational Performance

Learning Objectives:

1. Explore the situational environment.
2. Identify when a situation becomes actionable.
3. Discuss the planning process in various situations.

During this session, we will explore the baseline of situational awareness in an environment. We will connect what would be the concentric ring that connects a "normal" situation to one you need to be more aware of as you decide on action. Also, we will explore how having a plan impacts actions.

 **PRINT**

1:30-3:05 p.m.

How Do You Know If You Are Ready for Retirement?

Close Info ▲

Date: 07/12/2022 1:30-3:05 p.m.

History: New

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Management Services

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

COO

Clinic Leadership

HR Director/Manager

HS/EHS Director/Manager

IT Director/Manager

Program Director/Manager

Tracks: Financial, accounting and tax; Boards and tribal councils; Health care -FQHC only

Type: Mini

Level: Basic

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: 1.5

Trainers:



[Lisa Loughry](#)

Executive VP, National Accounts Mutual of America Financial Group



[Earl Jones, Jr.](#)

VP, National Accounts, Mutual of America Financial Group

Learning Objectives:

1. Define retirement planning success and retirement readiness.
2. Identify best practices in selecting plan providers and plan costs.
3. Discuss fiduciary reviews, diversification of portfolios and increase of participation rates.

Session Description:

Mutual of America Financial Group is pleased to present this session that will discuss better positioning your agency for retirement plan success and retirement readiness from an employee perspective.

Hear about best practices agencies should follow when selecting plan providers, understanding the "all in" costs of a retirement plan, due diligence plan fiduciary reviews, diversification of portfolios, achievement of higher participation rates and more.

 **PRINT**

1:30-3:05 p.m.

The Leader's Role in Fostering a Positive Culture

Close Info ▲

Date: 07/12/2022 1:30-3:05 p.m.

History: New

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Specialized Knowledge

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

COO

Clinic Leadership

Tracks: Boards and tribal councils; Talent

Type: Mini

Level: Basic

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: 1.5

Trainers:



[Barbara Low, SPHR, RODC](#)

Manager

Program Director/Manager

Learning Objectives:

1. Self-reflect regarding tone at the top.
2. Discuss how positivity impacts others.
3. Explore practical applications to help implement a positive culture.

Session Description:

Positive culture is often cited as one reason employees stay with their organization. Culture is so important, and this session will explore what role leaders play in creating, changing and/or perpetuating a positive culture. And what happens when you as a leader are not feeling so positive? We will discuss that too!

 **PRINT**

1:30-3:05 p.m.

GFA Health Session coming soon

Close Info ▲

Date: 07/12/2022 1:30-3:05 p.m.

History: New

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Coming soon

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

COO

Clinic Leadership

HR Director/Manager

HS/EHS Director/Manager

IT Director/Manager

Program Director/Manager

Learning Objectives:

Coming soon

Session Description:

Coming soon

 **PRINT**

Tracks:

Type: Mini

Level: Basic

Qualifies for Yellowbook?: Coming Soon

Prerequisites: None

CPE Credits: 1.5

Trainers:

Tuesday 2nd Afternoon Mini Sessions (attend one)

3:25-5 p.m.

COSO and Internal Controls

Close Info ▲

Date: 07/12/2022 3:25-5 p.m.

History: Updated

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Accounting

Tracks: Financial, accounting and tax; Performance improvement; Risk

Type: Mini

Level: Basic

Qualifies for Yellowbook?: Yes

Prerequisites: None



Senior Manager

Learning Objectives:

1. Discuss the requirements for internal controls.
2. Explore internal control components.
3. Identify how to apply internal controls to your organization.

Session Description:

Federally funded organizations are required to establish and maintain effective internal controls. The Uniform Guidance states that your internal controls should comply with the Standards for Internal Control in the Federal Government (Green Book) or the COSO Framework. In this session, we will review the components of internal control, from the control environment to monitoring and risk assessment. We will also discuss ways your organization can continue effective internal controls in our ever-changing world.

 **PRINT**

3:25-5 p.m.

Leadership Roundtable

Close Info ▲

Date: 07/12/2022 3:25-5 p.m.

History: New

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Specialized Knowledge

Applicable Audience: Board Member

CEO/Executive Director

COO

Clinic Leadership

HS/EHS Director/Manager

Program Director/Manager

Tracks: Boards and tribal councils; Talent

Type: Mini

Level: Basic

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: Coming Soon

Trainers:



[Tammy Jelinek, MBA](#)

Principal



[Denes Tobie, CPA](#)

Partner



[Julia Johnson](#)

Director, Organizational Performance

Learning Objectives:

N/A

Session Description:

Join this Wipfli-led panel discussion for leaders to explore what your current challenges are and what's just around the corner. This panel discussion will connect you those from Wipfli with leadership expertise to answer questions and explore ideas and connect you with peers in the audience.

 **PRINT**

3:25-5 p.m.

Human Trafficking Awareness

Close Info ▲

Date: 07/12/2022 3:25-5 p.m.

History: New

Experience: All (All levels of experience)

Tracks: Risk; Talent

Type: Mini

Level: Basic

CEO/Executive Director
 COO
 Clinic Leadership
 HR Director/Manager
 HR Staff
 HS/EHS Director/Manager
 HS/EHS Program Staff
 Program Director/Manager

Trainers:



[Andrew Hofstetter](#)
 Director, Organizational Performance

Learning Objectives:

1. Identify the forms of human trafficking.
2. Discuss the signs of human trafficking.
3. Identify appropriate steps to take if it occurs in the workplace.

Session Description:

As an agency, we deal with crises on a daily basis. Some crises are more subtle than others. During this session, we will discuss the forms of human trafficking. We will explore the signs to be aware of regarding human trafficking. We will talk about trauma bonding and dos and don'ts when it comes to addressing human trafficking in the workplace.



3:25-5 p.m.

ESG Investing – How to Invest With a Social Purpose

Close Info ▲

Date: 07/12/2022 3:25-5 p.m.
History: New
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Management Services
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 COO
 Clinic Leadership
 HR Director/Manager
 HS/EHS Director/Manager
 IT Director/Manager
 Program Director/Manager

Tracks: Financial, accounting and tax; Boards and tribal councils; Health care -FQHC only
Type: Mini
Level: Basic
Qualifies for Yellowbook?: No
Prerequisites: None
CPE Credits: 1.5

Trainers:



[Lisa Loughry](#)
 Executive VP, National Accounts Mutual of America Financial Group



[Earl Jones, Jr.](#)
 VP, National Accounts, Mutual of America Financial Group



[Andrew Kramer, CFA](#)
 Chairman, 320 Park Analytics LLC

Learning Objectives:

1. Explore retirement plan sponsors.
2. Illustrate how to match investments with philosophical views.
3. Identify investments with ESG factors.

Session Description:

Mutual of America Financial Group is pleased to present valuable insights into the recent growth of Environmental,

money in funds that align with one or more recognized ESG factors. ESG investing also considers an investment's potential environmental and social impacts as part of the selection process.

 PRINT

3:25-5 p.m.

GFA Health Session coming soon

Close Info ▲

Date: 07/12/2022 3:25-5 p.m.

History: New

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Coming soon

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

COO

Clinic Leadership

HR Director/Manager

HS/EHS Director/Manager

IT Director/Manager

Program Director/Manager

Learning Objectives:

Coming soon

Session Description:

Coming soon

Tracks:

Type: Mini

Level: Basic

Qualifies for Yellowbook?: Coming Soon

Prerequisites: None

CPE Credits: 1.5

Trainers:

 PRINT

3:25-5 p.m.

Success in Project Management

Close Info ▲

Date: 07/12/2022 3:25-5 p.m.

History: New

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Business Management & Organization

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

COO

Clinic Leadership

HR Director/Manager

HS/EHS Director/Manager

IT Director/Manager

Program Director/Manager

Learning Objectives:

1. Explore best practices for successful project management.

Tracks: Performance improvement

Type: Mini

Level: Basic

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: 1.5

Trainers:



[Jennifer Summers](#)

Manager

Session Description:

Have you been tasked with "doing more with less"? Do you have a project looming but you're not sure where to even start? Join us for an informative session that takes you through project management best practices and common pitfalls to avoid for effective project management. We will review operational efficiencies you can adopt to help you "do more with less" and streamline processes to help alleviate resource constraints and build your team for project success.

 **PRINT**

Tuesday Afternoon Networking

5:30-7:00 p.m.

Evening with Wipfli

Close Info ▲

Date: 07/12/2022 5:30-7:00 p.m.

History: Updated

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: None

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

COO

Clinic Leadership

Finance Staff

HR Director/Manager

HR Staff

HS/EHS Director/Manager

HS/EHS Program Staff

IT Director/Manager

Program Director/Manager

Tracks: Financial, accounting and tax; Boards and tribal councils; Health care -FQHC only; Head Start/Early Head Start; Performance improvement; Risk; Technology; Talent

Type: Mini

Level: Basic

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: None

Trainers:



[Denes Tobie, CPA](#)

Partner

Learning Objectives:

N/A

Session Description:

Do you want to make connections with your peers? How about have a chance to talk with other leaders about the success and/or struggles you've experienced in leading your organization? Would you like to get additional insight from the Wipfli staff and trainers or just get to know them? We want to get to know you, and we hope you'll join us at our Evening With Wipfli.

Join us for an evening of fun that includes opportunities to:

- Network with your peers.
- Talk with Wipfli staff and trainers.
- Win a donation check to your agency just for being in attendance!
- Enjoy appetizers.
- And more!

There will be a cash bar serving beer and wine. Nonalcoholic drinks will be complimentary.

 **PRINT**

Select EITHER one Morning Full Session OR a 1st and 2nd Morning Mini Session

Wednesday Morning Full Sessions (attend one)

8:15-11:45 a.m.

Assessing Readiness and Managing the Risks of Change

Close Info ▲

Date: 07/13/2022 8:15-11:45 a.m.
History: New
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Specialized Knowledge
Applicable Audience: CEO/Executive Director
 COO
 Clinic Leadership
 HR Director/Manager
 HR Staff
 HS/EHS Director/Manager
 HS/EHS Program Staff
 Program Director/Manager

Tracks: Performance improvement; Risk; Talent
Type: Full
Level: Basic
Qualifies for Yellowbook?: No
Prerequisites: None
CPE Credits: 3.5

Trainers:



[Deron Kling](#)
 Senior Manager



[Daniel Bashore, Ph.D.](#)
 Consultant II

Learning Objectives:

1. Identify risks in preparing for change.
2. Explore methods to address change in the agency.
3. Self-reflect about how your way of addressing change impacts how others address change.

Session Description:

Are you ready for change – and are you prepared to mitigate the risks? Assessing readiness and developing a change management strategy for any project are ultimately an attempt to mitigate risk. In this session, we will present ways of self-assessing your organization or team's readiness for change. This will provide a practical approach to assessing risk and developing a risk mitigation plan that informs the larger change strategy.

PRINT

8:15-11:45 a.m.

Business Continuity Planning for Nonprofits

Close Info ▲

Date: 07/13/2022 8:15-11:45 a.m.
History: New
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Specialized Knowledge
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 COO
 IT Director/Manager

Tracks: Performance improvement; Risk; Technology
Type: Full
Level: Intermediate
Qualifies for Yellowbook?: No
Prerequisites: Bring your organizations business continuity plan
CPE Credits: 3.5

Trainers:



[Ryan Peasley](#)
 Senior Technology Manager

Learning Objectives:

Session Description:

Our organizations provide families in need with the services, tools and resources they need to work toward and achieve economic self-sufficiency. As incidents and events such as pandemics, cybersecurity threats, wildfires, etc. continue to threaten the ability of agencies to serve their mission, it has become clear that they need to continue to build resiliency into their operations. Join us in this session to discuss ways you can continue to increase the resiliency of your organization and begin creating your own business continuity plans. You are welcome to bring your own plan to review during the session as we aim to build your own business continuity plan.

 **PRINT**

8:15-11:45 a.m.

HS/EHS Eligibility, Recruitment, Selection, Enrollment and Attendance (ERSEA)

Close Info ▲

Date: 07/13/2022 8:15-11:45 a.m.

History: Updated

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Specialized Knowledge

Applicable Audience: HS/EHS Director/Manager
HS/EHS Program Staff

Tracks: Head Start/Early Head Start

Type: Full

Level: Basic

Qualifies for Yellowbook?: Yes

Prerequisites: None

CPE Credits: 3.5

Trainers:



[Tammy Jelinek, MBA](#)

Principal

Learning Objectives:

1. Review requirements for Regulation 45 CFR Part 1302, Subpart A (ERSEA).
2. Share best practices in implementing ERSEA in the program.
3. Explore future challenges and solutions regarding ERSEA.

Session Description:

Head Start/Early Head Start programs have a specific set of requirements to assist program leaders in identifying, recruiting and selecting those children and families with the most need in their communities. In this session, we focus on all the eligibility, recruitment, selection, enrollment and attendance requirements of Regulation 45 CFR Part 1302, Subpart A, best known by the initials ERSEA, including adjusted guidelines in:

- Determining community strengths
- Documentation
- Definition of family
- Attendance
- Suspension and expulsion
- Fees
- And more!

We will share current best practices with your professional peers and explore challenges and solutions regarding the future of ERSEA in the programs.

 **PRINT**

If you did not select a Morning Full Session, select a 1st and 2nd Morning Mini Session

Choose one session per time slot below

8:15-9:50 a.m.

Connecting Strategy to Budget

Close Info ▲

Date: 07/13/2022 8:15-9:50 a.m.

History: New

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Business Management & Organization

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

COO

Clinic Leadership

Finance Staff

HR Director/Manager

HS/EHS Director/Manager

IT Director/Manager

Program Director/Manager

Tracks: Financial, accounting and tax; Boards and tribal councils; Performance improvement

Type: Mini

Level: Intermediate

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: 1.5

Trainers:



[Katherine Eilers, CPA](#)

Senior Manager



[Ciara Leahy, CPA](#)

Senior Manager, Audit

Learning Objectives:

1. Explore the connection between budget and outcome.
2. Review methods to connect the steps between the strategic plan and budgeting.
3. Discuss a new approach to budgeting.

Session Description:

Completing your strategic plan is not the end of the planning process. So what's next? In this session, we will explore connecting the strategic plan to the budgeting process and what this means for the planned outcomes and eventual impact on our community. As leaders, we need to help ensure our budgeting process identifies our plans and goals, connects them to the dollars and expected outcomes, and impact the communities served.

PRINT

8:15-9:50 a.m.

HS/EHS Governance: What Makes It Unique

Close Info ▲

Date: 07/13/2022 8:15-9:50 a.m.

History: Updated

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Specialized Knowledge

Applicable Audience: Board Member

CEO/Executive Director

HS/EHS Director/Manager

HS/EHS Program Staff

Tracks: Boards and tribal councils; Head Start/Early Head Start

Type: Mini

Level: Basic

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: 1.5

Trainers:



[Denes Tobie, CPA](#)

Partner

Learning Objectives:

1. Explore governing bodies and the policy council working together.
2. Review the governance requirements.
3. Identify how to build the relationship beyond compliance.

Leaders, board members and policy councils of Head Start/ Early Head Start (HS/ EHS) organizations working together is a requirement. It's also an area of risk in an organization. The requirements for boards are like no others. Leadership needs to know what their role is, so their agency does not get into trouble. Over the past few years, much more scrutiny has been placed on boards – and too many members are not fully aware. This is a must-attend session for HS/EHS grantee leaders.

 **PRINT**

8:15-9:50 a.m.

Managing Compensation, Compression and Total Rewards in a Dynamic Labor Market

Close Info ▲

Date: 07/13/2022 8:15-9:50 a.m.

History: New

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Specialized Knowledge

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

COO

HR Director/Manager

Tracks: Financial, accounting and tax; Boards and tribal councils; Talent

Type: Mini

Level: Basic

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: 1.5

Trainers:



[Julia Johnson](#)

Director, Organizational Performance

Learning Objectives:

1. Identify the key components of employee retention.
2. Explore compensation trends of the future.
3. Discuss how non-cash reward considerations impact compensation.

Session Description:

The dynamic labor market we are all operating in is shining a bright light on compensation practices. It is imperative that organizations look through multiple lenses when addressing compensation to attract and retain hard-to-find talent. Whether your wage comparability was just updated or it is time to look at it, this session is for you.

 **PRINT**

Wednesday 2nd Morning Mini Sessions (attend one)

10:10-11:45 a.m.

Connecting Strategy to Budget Workshop: BYON (Bring Your Own Numbers)

Close Info ▲

Date: 07/13/2022 10:10-11:45 a.m.

History: New

Experience: All (All levels of experience)

Advanced Preparation: Bring your information (strategic plan, most recent audit or financial documents)

Field of Study: Business Management & Organization

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

Tracks: Financial, accounting and tax; Boards and tribal councils; Performance improvement

Type: Mini

Level: Intermediate

Qualifies for Yellowbook?: No

Prerequisites: Connecting Strategy to Budget session

CPE Credits: 1.5

Trainers:

[Katherine Eilers, CPA](#)

Senior Manager

HS/EHS Director/Manager
Program Director/Manager



[Ciara Leahy, CPA](#)
Senior Manager, Audit

Learning Objectives:

1. Examine the connection between the strategic plan and budgeting to meet planned outcomes.
2. Apply knowledge of budgeting for strategic priority outcomes.
3. Create a budget plan to meet identified community needs.

Session Description:

Time to bring your own numbers! Attend this workshop – yes, we’ll be working – with your team and practice what you learned. Begin your budget planning process as a team and begin implementing a new budget plan. **Must attend the Connecting Strategy to Budget session.**



10:10-11:45 a.m.

Improve Future Client Experience

Close Info ▲

Date: 07/13/2022 10:10-11:45 a.m.
History: Updated
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Specialized Knowledge
Applicable Audience: Board Member
 CEO/Executive Director
 COO
 Clinic Leadership
 HS/EHS Director/Manager
 Program Director/Manager

Tracks: Boards and tribal councils; Performance improvement; Technology; Talent
Type: Mini
Level: Basic
Qualifies for Yellowbook?: No
Prerequisites: None
CPE Credits: 1.5

Trainers:



[Andrew Potasek](#)
Principal



[Devin Dukes Prosci CCP](#)
Consultant



[Ryan Peasley](#)
Senior Technology Manager

Learning Objectives:

1. Discover why you should focus on a centralized intake strategy.
2. Learn about what options are available on the market.
3. Identify how to move forward with implementing a strategy.

Session Description:

This session will focus on how incorporating a centralized intake strategy can help your organization better serve your clients, increase collaborate across programs and provide holistic, structured data to provide better reporting. We will address the primary challenges a centralized intake strategy aims to solve, as well as share our experiences on how to implement a strategy and cover technology tools that exist in this space.



10:10-11:45 a.m.

Federally Negotiated Indirect Cost Rates and 10% DeMinimis

Close Info ▲

Advanced Preparation: None
Field of Study: Accounting
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 COO
 Clinic Leadership
 Finance Staff
 HR Director/Manager
 HS/EHS Director/Manager
 HS/EHS Program Staff
 Program Director/Manager

Qualifies for Yellowbook?: Yes
Prerequisites: None
CPE Credits: 1.5

Trainers:



[Karl Eck, CPA](#)
 Partner

Learning Objectives:

1. Review implementation of a negotiated or a 10% de minimis rate.
2. Discuss the differences in how funding sources are calculating modified total direct costs (MTDC).
3. Be aware of potential challenges resulting from implementing a 10% de minimis rate.

Session Description:

The Uniform Guidance gave non-federal entities a new method of charging indirect and certain administrative costs to grants using a 10% de minimis indirect cost rate. This session is for non-federal entities that currently utilize the 10% de minimis option, are thinking of implementing it or have subrecipients that use a 10% de minimis rate.

PRINT

10:10-11:45 a.m.

TBD

Close Info ▲

Date: 07/13/2022 10:10-11:45 a.m.
History: Coming Soon
Experience: Coming Soon
Advanced Preparation: Coming Soon
Field of Study: Coming Soon
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 Finance Staff
 HR Director/Manager
 HS/EHS Director/Manager
 HS/EHS Program Staff

Tracks:
Type: Mini
Level: Coming Soon
Qualifies for Yellowbook?: Coming Soon
Prerequisites: Coming Soon
CPE Credits: 1.5
Trainers:

Learning Objectives:

Session Description:

PRINT

10:10-11:45 a.m.

Creating a Vision for the Future Utilizing Career Paths and Blueprints

Close Info ▲

Date: 07/13/2022 10:10-11:45 a.m.

Tracks: Talent

Field of Study: Specialized Knowledge
Applicable Audience: CEO/Executive Director
COO
Clinic Leadership
HR Director/Manager
HR Staff

Prerequisites: None
CPE Credits: 1.5
Trainers:



[Barbara Low, SPHR, RODC](#)
Manager

Learning Objectives:
1. Identify the basics of career blueprints.
2. Explore the power of the plan.
3. Identify next steps.

Session Description:
Preparing employees for promotion is a critical leadership role. Creating an organizational career path program will provide employees with a vision for their future. Developing individual career blueprints will support them with the guidance and direction to achieve their professional goals.

PRINT



Select EITHER one Afternoon Full Session OR a 1st and 2nd Afternoon Mini Session

Wednesday Afternoon Full Sessions (attend one)

1:30-5 p.m.

Employee Retention Strategies

Close Info ▲

Date: 07/13/2022 1:30-5 p.m.
History: New
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Specialized Knowledge
Applicable Audience: Board Member
CEO/Executive Director
COO
Clinic Leadership
HR Director/Manager
HR Staff
HS/EHS Director/Manager
Program Director/Manager

Tracks: Boards and tribal councils; Performance improvement; Talent
Type: Full
Level: Basic
Qualifies for Yellowbook?: No
Prerequisites: None
CPE Credits: 3.5
Trainers:



[Julia Johnson](#)
Director, Organizational Performance



[Barbara Low, SPHR, RODC](#)
Manager

Learning Objectives:
1. Explore critical factors for employee retention.
2. Discuss future employment trends and statistics.
3. Identify best practices as you move forward.

Session Description:
Retention, retention, retention! Much is being written on the "great resignation." Let's turn the tables and explore

resources strategies and practices to remain competitive in an effort to retain employees.

 PRINT

1:30-5 p.m.

General Board Governance

Close Info ▲

Date: 07/13/2022 1:30-5 p.m.
History: Updated
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Specialized Knowledge
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 HS/EHS Director/Manager

Tracks: Boards and tribal councils; Risk
Type: Full
Level: Basic
Qualifies for Yellowbook?: No
Prerequisites: None
CPE Credits: 3.5

Trainers:



[Denes Tobie, CPA](#)
 Partner

Learning Objectives:

1. Build awareness of overall board roles and responsibilities.
2. Discuss board responsibilities related to risk management.
3. Explore how to create a “tone at the top.”

Session Description:

This session is designed for all types of boards. It will cover the following topics:

- Management’s expectations
- Conflicts of interest
- Rights
- Responsibilities
- Board and internal controls
- Risk management
- Board evaluation

It will also include an exercise to explore your level of understanding.

 PRINT

1:30-5 p.m.

The Ins-and-Outs of Cost Allocation

Close Info ▲

Date: 07/13/2022 1:30-5 p.m.
History: Updated
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Accounting (Governmental)
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 COO
 Clinic Leadership
 Finance Staff
 HR Director/Manager
 HS/EHS Director/Manager

Tracks: Financial, accounting and tax
Type: Full
Level: Overview
Qualifies for Yellowbook?: Yes
Prerequisites: None
CPE Credits: 3.5

Trainers:



[Katherine Eilers, CPA](#)
 Senior Manager

Learning Objectives:

1. Discuss the importance of a cost allocation plan and key components it should include.
2. Review allowable methods of cost allocation, including direct allocation and using an indirect cost rate.
3. Discuss the allocation of costs and the effect of administrative cost limitations.

Session Description:

An organization's defined method of allocation should be simple, straightforward, and comply with its approved policies and procedures. Using the Uniform Guidance regulations, we will review allowable methods of cost allocation including direct costing and indirect cost rates (including the 10% de minimis rate), administrative cost limits, and discuss how your organization may use cost allocation to run more efficiently and effectively.



If you did not select an Afternoon Full Session, select a 1st and 2nd Afternoon Mini Session

Choose one session per time slot below

Wednesday 1st Afternoon Mini Sessions (attend one)

1:30-3:05 p.m.

Connecting the Dots to Grant Funded Finances

Close Info ▲

Date: 07/13/2022 1:30-3:05 p.m.
History: Updated
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Accounting
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 COO
 Clinic Leadership
 Finance Staff
 HR Director/Manager
 HS/EHS Director/Manager
 HS/EHS Program Staff
 Program Director/Manager

Tracks: Financial, accounting and tax
Type: Mini
Level: Basic
Qualifies for Yellowbook?: Yes
Prerequisites: None
CPE Credits: 1.5
Trainers:

[Karl Eck, CPA](#)
 Partner

Learning Objectives:

1. Identify common accounting and reporting challenges in grant-funded organizations.
2. Review the impact of applicable accounting standards.
3. Discuss different options and points of view related to grant-funded accounting challenges.

Session Description:

Grant-funded organizations are unique in regard to the innovative programs they provide. Often, accounting for programs and circumstances can be difficult because of the lack of specific accounting guidance on these programs and activities. Connecting the dots of the financial aspects of a grant-funded program can be daunting. This session gives you time to explore accounting for these unique items and the freedom to discuss your organization's unique accounting issues. This session is a great way for you to gain perspective on grant-funded challenges and learn what others are experiencing.

1:30-3:05 p.m.

Communication Plans – Develop and Deliver

Close Info ▲

Date: 07/13/2022 1:30-3:05 p.m.**History:** New**Experience:** All (All levels of experience)**Advanced Preparation:** None**Field of Study:** Specialized Knowledge**Applicable Audience:** Board Member

CEO/Executive Director

COO

Clinic Leadership

HR Director/Manager

HS/EHS Director/Manager

IT Director/Manager

Program Director/Manager

Learning Objectives:

1. Explore tools in writing a change story.
2. Discuss positive methods in communication planning.
3. Identify when a communication plan is needed.

Session Description:

If you have ever wondered why a change was made, this session is for you. Communication is essential. The better we plan our communications, the more effective our efforts are. In this session we will present a practical approach to developing a communication plan and delivering that planned communication.

 PRINT**Tracks:** Boards and tribal councils; Performance improvement; Talent**Type:** Mini**Level:** Basic**Qualifies for Yellowbook?:** No**Prerequisites:** None**CPE Credits:** 1.5**Trainers:**[Deron Kling](#)

Senior Manager

1:30-3:05 p.m.

Managing Digital Assets in the "Great Resignation"

Close Info ▲

Date: 07/13/2022 1:30-3:05 p.m.**History:** New**Experience:** All (All levels of experience)**Advanced Preparation:** None**Field of Study:** Business Management & Organization**Applicable Audience:** Board Member

CEO/ED

CFO

Finance Staff

HR Director

HR Staff

IT Director

Learning Objectives:

1. Identify digital assets of concern.
2. Explore how the loss of digital assets can negatively impact agencies.
3. Discuss how your organization can protect digital assets in the face of staff turnover.

Session Description:

Staff might be leaving as part of the "Great Resignation," but are your digital assets also leaving? Preserving and

Tracks: Financial, accounting and tax; Boards and tribal councils; Technology**Type:** Mini**Level:** Basic**Qualifies for Yellowbook?:** No**Prerequisites:** None**CPE Credits:** 1.5**Trainers:**[Marc Courey, CPA/CFP, JD, LLM, CFE,](#)[CICA, CCEP, CIA](#)

Director – Forensic & Litigation Services

easily overlook. We will also explore the measures that are critical to protecting your organization from the potential aftermath and consequences of an employee's departure.

 PRINT

1:30-3:05 p.m.

Leveraging Team Building For Good (Not Evil)

Close Info ▲

Date: 07/13/2022 1:30-3:05 p.m.
History: New
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Specialized Knowledge
Applicable Audience: CEO/Executive Director
 CFO/Finance Director
 HS/EHS Director/Manager

Tracks: Performance improvement
Type: Mini
Level: Basic
Qualifies for Yellowbook?: No
Prerequisites: None
CPE Credits: 1.5

Trainers:



[Tammy Jelinek, MBA](#)
 Principal



[Teri LeSage](#)
 Curriculum Developer

Learning Objectives:

1. Identify the signs of when you need to do team building.
2. Explore an assortment of team building exercises.
3. Discuss the positive impacts of team building.

Session Description:

In this session, we will explore why team building matters. To build a sense of community among your teams, going above and beyond the day-to-day job is often necessary. Though team building can be used to solve a challenge or build a solution, it can also help leaders identify behavioral areas of concern within the team dynamics. Together, we will “test drive” a few of these team building exercises, explore the purpose behind each exercise and identify how team building can be used to meet your desired outcomes.

 PRINT

Wednesday 2nd Afternoon Mini Session

3:25-5 p.m.

MIDWEEK GENERAL SESSION

Close Info ▲

Date: 07/13/2022 3:25-5 p.m.
History: Coming Soon
Experience: All (All levels of experience)
Advanced Preparation: Coming soon
Field of Study: Coming soon
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 Finance Staff
 HR Director/Manager

Tracks: Financial, accounting and tax; Boards and tribal councils; Health care -FQHC only; Head Start/Early Head Start; Performance improvement; Risk; Technology; Talent
Type: Mini
Level: Coming Soon
Qualifies for Yellowbook?: Coming Soon
Prerequisites: Coming soon
CPE Credits: TBD
Trainers:

Learning Objectives:

Coming soon

Session Description:

Coming soon

 **PRINT**

 **Thursday, July 14, 2022**

Select EITHER one Morning Full Session OR a 1st and 2nd Morning Mini Session

Thursday Morning Full Sessions (attend one)

8:15-11:45 a.m.

Aligning Finance, Talent and Technology to Your Strategic Plan

Close Info ▲

Date: 07/14/2022 8:15-11:45 a.m.

History: Updated

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Business Management & Organization

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

Finance Staff

HR Director/Manager

HS/EHS Director/Manager

Tracks: Financial, accounting and tax; Performance improvement; Technology; Talent

Type: Full

Level: Basic

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: 3.5

Trainers:



[Jeffrey Prottas, MBA, CFRE](#)

Manager

Learning Objectives:

1. Explore managing diversifying revenue in a grant-funded program.
2. Discover how to set a strategy that does not shy away from critical areas due to lack of resources and lack of strategy to secure necessary assets.
3. Assess what your organization should do to eliminate barriers.

Session Description:

This session aligns finance, talent and technology strategies with discussions about resources for long-term organizational success. We will explore ways of diversifying revenue streams that allow for maximum flexibility to meet needs that are unable to be met with restricted funding. Together we will explore how maximizing human capital and managing talent can successfully position organizations for financial growth and how technology is vital to managing the engagement of key stakeholders and funders.

 **PRINT**

8:15-11:45 a.m.

Leadership Styles and Effective Management of Your Teams

Close Info ▲

Date: 07/14/2022 8:15-11:45 a.m.

History: New

Experience: All (All levels of experience)

Tracks: Talent

Type: Full

Level: Intermediate

CEO/Executive Director
 CFO/Finance Director
 HR Director/Manager
 HS/EHS Director/Manager

Trainers:



[Alyson McKinster](#)
 Manager

Learning Objectives:

1. Explore leadership styles and the impact leadership has on teams.
2. Consider the impact of team-style dynamics.
3. Receive and develop recommendations for next steps.

Session Description:

This session is a unique opportunity for leaders to assess and enhance awareness around leadership styles. Explore how to maximize the strength of teams to achieve the organization's mission and vision. There will be lively discussion and exploration of the numerous unique styles of leaders.

PRINT

8:15-11:45 a.m.

The Ever-Evolving Search for In-Kind

Close Info ▲

Date: 07/14/2022 8:15-11:45 a.m.
History: New
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Specialized Knowledge
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 Finance Staff
 HS/EHS Director/Manager
 HS/EHS Program Staff

Tracks: Head Start/Early Head Start
Type: Full
Level: Basic
Qualifies for Yellowbook?: No
Prerequisites: None
CPE Credits: 3.5

Trainers:



[Tammy Jelinek, MBA](#)
 Principal

Learning Objectives:

1. Explore the requirements around allowable in-kind.
2. Determine what in-kind to ask for.
3. Get tools to use when making your ask.

Session Description:

Generating in-kind can be a challenge. In this session, we will discuss the tools, techniques and regulations of generating, calculating and documenting non-federal match. Make generating in-kind the responsibility of everyone in your program. We will also explore methods to plan who to ask, how to ask, and what in-kind to ask for in the community. Leave with specific goals, strategies and tasks to bring more in-kind into your agency. (Imagine if you had all the in-kind you needed!)

PRINT

8:15-11:45 a.m.

Has Your Fraud IQ Kept Pace With Your COVID Fraud Risk?

Close Info ▲

Date: 07/14/2022 8:15-11:45 a.m.
History: New
Experience: All (All levels of experience)

Tracks: Financial, accounting and tax; Boards and tribal councils; Technology
Type: Full

CEO/Executive Director
 CFO
 Finance Staff
 HR Director
 HR Staff
 IT Director

CPE Credits: 3.5**Trainers:**

[Marc Courey, CPA/CFE, JD, LL.M., CFE, CICA, CCEP, CIA](#)

Director – Forensic & Litigation Services

Learning Objectives:

1. Explore new fraud schemes.
2. Share stories and best practices around fraud occurrences.
3. Plan next steps to take back to your agency to address rising fraud concerns.

Session Description:

Occupational fraud was estimated to cost U.S. organizations a whopping five percent of gross revenue – before COVID. COVID, government mandates and staff pressures all increased your organization's risk of occupational fraud. This increase comes through your organization's response and by fueling the components of the fraud triangle – need, opportunity and rationalization. It's a perfect storm that increases the potential for staff to act inappropriately and take advantage of your resources. This session will address the origins of occupational fraud risk, why that risk has increased as a result of the COVID response and what the organization can do to address the increased risk.

PRINT

If you did not select a Morning Full Session, select a 1st and 2nd Morning Mini Session

Choose one session per time slot below

Thursday 1st Morning Mini Sessions (attend one)

8:15-9:50 a.m.

Integrating Digital Strategy in Your Planning

Close Info ▲

Date: 07/14/2022 8:15-9:50 a.m.**History:** Updated**Experience:** All (All levels of experience)**Advanced Preparation:** None**Field of Study:** Computer Software & Applications**Applicable Audience:** CEO/Executive Director

HS/EHS Director/Manager

Tracks: Performance improvement; Technology**Type:** Mini**Level:** Basic**Qualifies for Yellowbook?:** No**Prerequisites:** None**CPE Credits:** 1.5**Trainers:**

[Andrew Potasek](#)

Principal



[Ryan Peasley](#)

Senior Technology Manager

Learning Objectives:

1. Explore technology road mapping.
2. Identifying when to keep (or not keep) your current systems.
3. Discuss next steps.

This session will give you the time and tools to think about technology – current and future. We will discuss how to build a strategy and roadmap, evaluating current technology and needs, exploring future trends, and the process to deciding to replace/integrate and build/buy. How often do you review your technology strategy – maybe it is time?

 PRINT

8:15-9:50 a.m.

Software Selection: How to Maximize Value and Minimize Risk in this Crucial Decision

Close Info ▲

Date: 07/14/2022 8:15-9:50 a.m.

History: Updated

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Computer Software & Applications

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

COO

Finance Staff

IT Director/Manager

Program Director/Manager

Tracks: Performance improvement; Risk; Technology

Type: Mini

Level: Basic

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: 1.5

Trainers:



[Brett Polglaze](#)

Senior Manager

Learning Objectives:

1. Define a process for choosing a software system for your organization.
2. Explore the difference between features, functions and business processes.
3. Develop a framework for minimizing risk when choosing software.

Session Description:

You have been tasked with finding new software for your organization. How do you choose the right one? This session will walk through the steps for minimizing risks when choosing an enterprise software system. From defining key requirements through vendor negotiation, this session will be an education and dialog—removing the mystery from your next system purchase.

 PRINT

8:15-9:50 a.m.

Uniform Guidance Procurement Regulations

Close Info ▲

Date: 07/14/2022 8:15-9:50 a.m.

History: Updated

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Accounting (Governmental)

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

COO

Clinic Leadership

Finance Staff

HS/EHS Director/Manager

Program Director/Manager

Tracks: Financial, accounting and tax; Risk

Type: Mini

Level: Basic

Qualifies for Yellowbook?: Yes

Prerequisites: None

CPE Credits: 1.5

Trainers:



[Katherine Eilers, CPA](#)

Senior Manager

3. Identify procurement internal controls and best practices in the procurement process.

Session Description:

Does your organization know the general procurement standards under the Uniform Guidance? Does it know the allowable methods of procurement and what policies and procedures are affected by the procurement regulations? In this session, we will review the Uniform Guidance procurement regulations in 2 CFR Part 200, and discuss additional steps in the procurement process, including internal controls.

 **PRINT**

8:15-9:50 a.m.

Spend Management Best Practices for Nonprofits

Close Info ▲

Date: 07/14/2022 8:15-9:50 a.m.

History: New

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Specialized Knowledge

Applicable Audience: CFO/Finance Director

Finance Staff

HS/EHS Director/Manager

HS/EHS Program Staff

Tracks: Financial, accounting and tax; Performance improvement

Type: Mini

Level: Basic

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: 1.5

Trainers:



[Rebecca Hurst, CPA](#)

Manager

Learning Objectives:

1. Discuss common headaches organizations have related to spend management.
2. Explore automated spend management functionality in the accounting system.
3. Discuss spend management best practices.

Session Description:

Spend management provides a way for organizations to automatically control spending according to a specified budget. It informs leaders when an expense exceeds the set budget. In this session, we will use Sage Intacct as an example of how this process looks in today's technology. We will also discuss methods different nonprofits are using to incorporate spend management best practices into their everyday finance operations to increase insight and provide valuable data for decision making.

 **PRINT**

Thursday 2nd Morning Mini Sessions (attend one)

10:10-11:45 a.m.

Digital Technology Solutions and Trends

Close Info ▲

Date: 07/14/2022 10:10-11:45 a.m.

History: New

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Computer Software & Applications

Applicable Audience: Board Member

CEO/Executive Director

Tracks: Performance improvement; Technology

Type: Mini

Level: Basic

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: 1.5

Trainers:

HR Director/Manager
 HS/EHS Director/Manager
 HS/EHS Program Staff
 IT Director/Manager
 Program Director/Manager



[Andrew Potasek](#)
Principal

Learning Objectives:

1. Discover the case for nonprofit digital strategy.
2. Assess your current approach to digital strategy.
3. Determine how your digital strategy can transform your impact.
4. Begin your digital transformation.

Session Description:

Nonprofits everywhere are realizing it has become increasingly difficult to continue to drive impact in the communities we serve. If it isn't the unrelenting wave of social issues, it's the decreasing amounts of resources we are given to drive change. What we need is a means to transform the way we work so we can do far more with the resources that are available. Technology has extraordinary power, but technology alone is not the answer. Adopting a well-thought-out digital strategy that connects our people, process and technology can not only improve the way we work but also deliver our mission to our communities. In this session, we'll make the case for why nonprofits need to digitally transform, and we'll provide practical guidance on how to start building a transformative digital strategy.

PRINT

10:10-11:45 a.m.

How Boards and Executive Directors Work Together Related to Finances

Close Info ▲

Date: 07/14/2022 10:10-11:45 a.m.

History: New

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Specialized Knowledge

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

COO

Clinic Leadership

Tracks: Financial, accounting and tax; Boards and tribal councils

Type: Mini

Level: Basic

Qualifies for Yellowbook?: Yes

Prerequisites: None

CPE Credits: 1.5

Trainers:



[Denes Tobie, CPA](#)
Partner

Learning Objectives:

1. Explore board roles and responsibilities as they relate to finances.
2. Identify ways to work together more effectively.
3. Realize that fiscal responsibility is more than just the financial statements.

Session Description:

This session explores the many areas of fiscal responsibility that boards and CEOs/EDs need to address when working together. Topics covered will include legal and fiscal responsibility, roles, budgets, fundraising, risk and approvals. Both new and experienced board members will benefit.

PRINT

History: New
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Specialized Knowledge
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 COO
 Clinic Leadership
 Finance Staff
 HS/EHS Program Staff
 IT Director/Manager
 Program Director/Manager

Type: Mini
Level: Basic
Qualifies for Yellowbook?: No
Prerequisites: None
CPE Credits: 1.5

Trainers:



[Brett Polglaze](#)
 Senior Manager

Learning Objectives:

1. Explore the definition of waste in business processes.
2. Identify non-value activities that are required by funding sources.
3. Share tips and tricks to eliminate waste in your processes.

Session Description:

Through real-world examples and case study, you will learn to diagnose process waste, how to differentiate between non-value added steps and waste, and tools to eliminate waste from your organization.

PRINT

10:10-11:45 a.m.

Your Financial Policies and Procedures Say What? Oh My

Close Info ▲

Date: 07/14/2022 10:10-11:45 a.m.
History: Updated
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Accounting (Governmental)
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 COO
 Clinic Leadership
 Finance Staff

Tracks: Financial, accounting and tax; Risk
Type: Mini
Level: Basic
Qualifies for Yellowbook?: Yes
Prerequisites: None
CPE Credits: 1.5

Trainers:



[Katherine Eilers, CPA](#)
 Senior Manager

Learning Objectives:

1. Identify what needs to be in financial policies and procedures.
2. Discuss why you need to have them.
3. Explore ways to keep them updated and followed.

Session Description:

Most grant-funded organizations have financial policies and procedures. But what do they say? Do they reference outdated regulations? Do they follow old processes and systems when new ones are in place? Is the organization at risk of receiving a finding because the documented procedures are not followed? This session will explore these questions and more!

PRINT



Select EITHER one Afternoon Full Session OR a 1st and 2nd Afternoon Mini Session

Thursday Afternoon Full Sessions (attend one)

1:30-5 p.m.

Head Start/Early Head Start Monitoring Protocol 101

Close Info ▲

Date: 07/14/2022 1:30-5 p.m.

History: New

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Specialized Knowledge

Applicable Audience: CEO/Executive Director

CFO/Finance Director

Finance Staff

HS/EHS Director/Manager

HS/EHS Program Staff

Tracks: Head Start/Early Head Start

Type: Full

Level: Basic

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: 3.5

Trainers:



[Tammy Jelinek, MBA](#)

Principal

Learning Objectives:

1. Discuss the history and intentions of the reviews.
2. Identify areas of improvement in your program.
3. Share ideas, thoughts and best practices for these protocols.

Session Description:

Each year, the Office of Head Start makes changes in the Head Start Monitoring Protocol AMS 2.0. This session will address what's different from past years and how the Head Start Act, Head Start Program Performance Standards and Uniform Guidance are addressed. We will take a deep look at the Aligned Monitoring System 2.0 Focus Area 1 and Focus Area 2 expectations.

PRINT

1:30-5 p.m.

Microsoft 365 Tips, Tricks and Takeaways

Close Info ▲

Date: 07/14/2022 1:30-5 p.m.

History: Updated

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Information Technology

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

COO

Finance Staff

HR Director/Manager

HR Staff

HS/EHS Director/Manager

HS/EHS Program Staff

IT Director/Manager

Tracks: Performance improvement; Technology

Type: Full

Level: Basic

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: 3.5

Trainers:



[Ryan Peasley](#)

Senior Technology Manager

Learning Objectives:

1. Create awareness of Microsoft nonprofit donations and discounts.
2. Describe features and functions of Microsoft Office 365.
3. Solve common organizational issues using Microsoft Office 365 features.

Session Description:

During this hands-on session you'll get a chance to test drive Microsoft solutions and discover how they can deliver immediate business value to both you and your organization. Each facilitator-led session is customized to meet your needs, so you can explore tools at your own pace, focus on the products and solutions you want and discover firsthand how they can solve your biggest challenges.



1:30-5 p.m.

Sage Intacct Fundamentals

Close Info ▲

Date: 07/14/2022 1:30-5 p.m.
History: New
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Computer Software & Applications
Applicable Audience: CFO/Finance Director
 Finance Staff

Tracks: Financial, accounting and tax; Technology
Type: Full
Level: Basic
Qualifies for Yellowbook?: No
Prerequisites: None
CPE Credits: 3.5

Trainers:



[Rebecca Hurst, CPA](#)

Manager



[Derrick Williams](#)

Manager

Learning Objectives:

1. Explore Sage Intacct accounting software.
2. Review navigation.
3. Identify best practices for using the software.

Session Description:

If you are interested in learning why so many nonprofits are switching to Intacct, this is your session. You will learn how Intacct provides greater efficiency and managerial visibility so your nonprofit can drive down costs while fully pursuing your organization's mission. And if you already own it, you will also learn basic Intacct navigation and how it handles general accounting functions.



If you did not select an Afternoon Full Session, select a 1st and 2nd Afternoon Mini Session

Choose one session per time slot below

Thursday 1st Afternoon Mini Sessions (attend one)

1:30-3:05 p.m.

GEMBA Walk: Leveraging Industrial Management Tools in Your Agency

Close Info ▲

Advanced Preparation: None
Field of Study: Specialized Knowledge
Applicable Audience: CEO/Executive Director
 CFO/Finance Director
 COO
 Clinic Leadership
 Finance Staff

Qualifies for Yellowbook?: No
Prerequisites: None
CPE Credits: 1.5
Trainers:



[Brett Polglaze](#)
 Senior Manager

Learning Objectives:

1. Define the manufacturing management tool called GEMBA.
2. Connect the tool to the processes in grant-funded organizations.
3. Identify and prepare for the where and how of your first GEMBA walk.

Session Description:

A traditional GEMBA is the action of watching a process. In this session, you will learn how to conduct a GEMBA walk. The objectives are to observe the work, ask questions, and truly discover what is going on in your processes.



1:30-3:05 p.m.

Internal Controls: Segregating Financial Duties in Small Offices

Close Info ▲

Date: 07/14/2022 1:30-3:05 p.m.
History: Updated
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Accounting
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 COO
 Finance Staff

Tracks: Financial, accounting and tax; Performance improvement; Risk
Type: Mini
Level: Basic
Qualifies for Yellowbook?: Yes
Prerequisites: None
CPE Credits: 1.5
Trainers:



[Katherine Eilers, CPA](#)
 Senior Manager

Learning Objectives:

1. Identify incompatible accounting functions.
2. Evaluate how to separate duties with a limited number of staff.
3. Identify who should and should not be a part of your accounting process.

Session Description:

Do you consider your accounting department small in number? Do you have a hard time spreading work around to employees to separate duties and strengthen internal controls? Do you receive a segregation of duties comment from the auditor or monitor? If any of these apply to you, this is the session to attend! We'll discuss segregation of duties, functions that are incompatible, and how to recruit people to help with the accounting functions. By identifying the internal controls for offices with a limited number of staff, it better helps the agency evaluate how to segregate financial duties to reduce risk of error or fraud.



1:30-3:05 p.m.

Managing Conflict

Close Info ▲

Advanced Preparation: None
Field of Study: Specialized Knowledge
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 COO
 Clinic Leadership
 Finance Staff
 HR Director/Manager
 HR Staff
 HS/EHS Director/Manager
 HS/EHS Program Staff
 IT Director/Manager
 Program Director/Manager

Qualifies for Yellowbook?: No
Prerequisites: None
CPE Credits: 1.5

Trainers:



[Julia Johnson](#)

Director, Organizational Performance

Learning Objectives:

1. Identify when conflict is constructive.
2. Discuss methods to handle ineffective conflict.
3. Explore tactics to address destructive conflict so it does not reoccur.

Session Description:

When you spend as much time with your colleagues as you do your friends and family – sometimes more – conflicts are bound to arise. And some conflict is actually good. It uncovers challenges. It can even open doors for solutions. In this session, we explore how to address conflict in productive ways.

PRINT

1:30-3:05 p.m.

Strategic Planning: You've Built the Plan, Now It's Time to Act

Close Info ▲

Date: 07/14/2022 1:30-3:05 p.m.
History: New
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Business Management & Organization
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 COO
 Clinic Leadership
 HR Director/Manager
 HS/EHS Director/Manager
 IT Director/Manager
 Program Director/Manager

Tracks: Boards and tribal councils; Performance improvement; Talent
Type: Mini
Level: Basic
Qualifies for Yellowbook?: No
Prerequisites: None
CPE Credits: 1.5

Trainers:



[Jeffrey Prottas, MBA, CFRE](#)

Manager

Learning Objectives:

1. Identify how to build actionable work plans, accountability and clarity into strategic planning efforts.
2. Build communication and action plans for driving change.
3. Motivate and empower staff, board members, partners, funders and more about your goals.

you've developed long-term strategies and identified short-term goals to help them, but now what: how do you take those short-term goals and turn them into an action plan for getting things done? How do you identify who "owns" a goal without falling back on the same small group of leaders every time? Join this highly interactive workshop session to learn practical approaches to action planning, gaining participation across the organization and designing real-world, measurable steps to fulfill those short-term goals and complete the long-term strategies. Participants will use action planning tools and templates in a hands-on environment to design plans and approaches.

 PRINT

Thursday 2nd Afternoon Mini Sessions (attend one)

3:25-5 p.m.

Internal Controls: A Focus on the Area of Risk Assessment

Close Info ▲

Date: 07/14/2022 3:25-5 p.m.

History: New

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Accounting

Applicable Audience: Board Member

CEO/Executive Director

CFO/Finance Director

COO

Clinic Leadership

Finance Staff

HS/EHS Director/Manager

Tracks: Financial, accounting and tax; Risk

Type: Mini

Level: Basic

Qualifies for Yellowbook?: Yes

Prerequisites: None

CPE Credits: 1.5

Trainers:



[Katherine Eilers, CPA](#)

Senior Manager

Learning Objectives:

1. Explore how to create a risk assessment process for your team.
2. Determine how to identify, evaluate and prioritize risks.
3. Discuss risk trends in grant-funded organizations.

Session Description:

In this session, we will discuss what it means to do a risk assessment. Who should complete the assessment, and how is it different from what the auditor prepares? Risk assessments affect our processes, operations and funding relationships. Join us to explore risk assessment and how it can be – and should be – leveraged to improve internal controls and how it impacts monitoring and audits.

 PRINT

3:25-5 p.m.

Sharing Your Strategic Planning Success: Creating Value Through Dashboards

Close Info ▲

Date: 07/14/2022 3:25-5 p.m.

History: Updated

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Business Management & Organization

Applicable Audience: CEO/Executive Director

COO

Tracks: Performance improvement; Technology; Talent

Type: Mini

Level: Basic

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: 1.5

Trainers:

Learning Objectives:

1. Establish clear expectations and accountability for strategic plan execution.
2. Implement best practice processes for executing on your plan.
3. Determine whether dashboarding tools are needed for your organization.

Session Description:

Even organizations that develop the best strategic plan can falter when it comes to execution of the plan. There are a variety of contributing factors: lack of visible leadership, confusion about or lack of accountability, poor communication and unclear expectations, among other things. Executing a strategic plan requires a clear process supported by tools that make the plan visible, accessible and agile. In this session, we will speak to the best practices relating to the execution of strategic plans and how you can use a reporting and dashboard tool to track your process and report on your outcomes.

 **PRINT**

3:25-5 p.m.

What a New Executive Director Needs to Know About Finance

Close Info ▲

Date: 07/14/2022 3:25-5 p.m.

History: New

Experience: All (All levels of experience)

Advanced Preparation: None

Field of Study: Specialized Knowledge

Applicable Audience: CEO/Executive Director

Tracks: Financial, accounting and tax; Performance improvement; Risk

Type: Mini

Level: Basic

Qualifies for Yellowbook?: No

Prerequisites: None

CPE Credits: 1.5

Trainers:



[Denes Tobie, CPA](#)

Partner

Learning Objectives:

1. Review roles and responsibilities as they relate to finances.
2. Discover ways to work with finance effectively.
3. Discover that fiscal responsibility is more than just the financial statements.

Session Description:

For new leaders in federally funded programs, understanding the money side is imperative. New leaders coming to this session will explore the many areas of fiscal responsibility. We will discuss the basics and the complex issues and explore what to look for and the questions to ask.

 **PRINT**

 **Friday, July 15, 2022**

Select a 1st and 2nd Morning Mini Session

Choose one session per time slot below

History: New
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Specialized Knowledge
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 COO
 Clinic Leadership
 Finance Staff
 HR Director/Manager
 HR Staff
 HS/EHS Director/Manager
 HS/EHS Program Staff
 IT Director/Manager
 Program Director/Manager

Type: Mini
Level: Basic
Qualifies for Yellowbook?: No
Prerequisites: None
CPE Credits: 1.5

Trainers:



[Barbara Low, SPHR, RODC](#)
 Manager

Learning Objectives:

1. Explore where you are in your career, in your life.
2. Explore where you want to be moving forward.
3. Decide next steps for your best life plan.

Session Description:

Work-life balance is needed now more than ever. If you function on autopilot, this thought-provoking session provides an opportunity to reflect on your life and take inventory of the things that are working and those that aren't. Be prepared to reevaluate and question priorities and to develop a plan to achieve your best life.

PRINT

8:15-9:50 a.m.

Financial Statements: Is this in English?

Close Info ▲

Date: 07/15/2022 8:15-9:50 a.m.
History: New
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Specialized Knowledge
Applicable Audience: CEO/Executive Director
 COO
 Clinic Leadership
 HR Director/Manager
 HS/EHS Director/Manager
 HS/EHS Program Staff
 Program Director/Manager

Tracks: Financial, accounting and tax; Risk; Talent
Type: Mini
Level: Basic
Qualifies for Yellowbook?: Yes
Prerequisites: None
CPE Credits: 1.5

Trainers:



[Ciara Leahy, CPA](#)
 Senior Manager, Audit

Learning Objectives:

1. Explore the makeup of financial statements.
2. Identify what to look for in reviewing financial statements.
3. Answer your questions before you need to ask Finance.

sometimes you are not used to seeing that many commas and that many zeros on a page. Are you new to a role where you need to understand financial statements at a high level? Do you struggle with interpreting financial statements? Or are you looking to expand your knowledge of what to look for when interpreting financial statements? In a workshop setting, we will look through financial statements from two different organizations. We will talk through trends. We will discuss ratios and what they mean. Together we can translate from “accounting-ese” to English!

 **PRINT**

8:15-9:50 a.m.

Wake up With Wipfli! Your Questions Answered

Close Info ▲

Date: 07/15/2022 8:15-9:50 a.m.
History: New
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Specialized Knowledge
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 COO
 Finance Staff
 HR Director/Manager
 HR Staff
 HS/EHS Director/Manager
 HS/EHS Program Staff
 IT Director/Manager
 Program Director/Manager

Tracks: Financial, accounting and tax; Boards and tribal councils; Head Start/Early Head Start; Performance improvement; Risk; Technology; Talent
Type: Mini
Level: Basic
Qualifies for Yellowbook?: No
Prerequisites: None
CPE Credits: 0

Trainers:



[Denes Tobie, CPA](#)
 Partner



[Katherine Eilers, CPA](#)
 Senior Manager

Learning Objectives:
 N/A

Session Description:

The conference is winding down. We do not want you to go away with any unanswered questions. Wake up with Wipfli, and our team will answer your questions, explore ideas and connect you with peers in the audience.

 **PRINT**

8:15-9:50 a.m.

You've Been Hacked – Now What?!

Close Info ▲

Date: 07/15/2022 8:15-9:50 a.m.
History: New
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Computer Software & Applications
Applicable Audience: CEO/Executive Director
 CFO/Finance Director
 COO
 Clinic Leadership
 Finance Staff
 IT Director/Manager

Tracks: Performance improvement; Risk; Technology
Type: Mini
Level: Basic
Qualifies for Yellowbook?: No
Prerequisites: None
CPE Credits: 1.5

Trainers:



[Ryan Peasley](#)
 Senior Technology Manager

program (IRP).
 3. Review the complete incident response life cycle.

Session Description:

Bad stuff happens. How your organization responds to a data breach, device loss, or corporate account takeover will either minimize or compound the impact of the event. In this session, we will review components of an effective IRP and facilitate an interactive group tabletop exercise to simulate the decisions that need to be made during a crisis.

 **PRINT**

Friday 2nd Morning Mini Sessions (attend one)

10:10-11:45 a.m.

Deciding When It's Time to Stop, Start or Change

Close Info ▲

Date: 07/15/2022 10:10-11:45 a.m.
History: Updated
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Business Management & Organization
Applicable Audience: Board Member
 CEO/Executive Director
 CFO/Finance Director
 COO
 CSBG/Org Standard
 Finance Staff
 HR Director/Manager
 HR Staff
 HS/EHS Director/Manager
 HS/EHS Program Staff
 IT Director/Manager
 Program Director/Manager
 Quality Improvement Leader

Tracks: Performance improvement; Talent
Type: Mini
Level: Basic
Qualifies for Yellowbook?: No
Prerequisites: None
CPE Credits: 1.5
Trainers:



[Tammy Jelinek, MBA](#)
 Principal

Learning Objectives:

1. Explore the processes to stop, start and change behaviors.
2. Discuss approaches to implement in the agency.
3. Identify next steps.

Session Description:

There is a great saying - it is hard to work on the business when you are working in the business. Use this session and the techniques shared, to give you tips to identify when it is time to stop doing "what we have always done", so we can start doing "what we need to do" or change how we are we currently doing "it".

 **PRINT**

10:10-11:45 a.m.

TBD

Close Info ▲

Date: 07/15/2022 10:10-11:45 a.m.
History: New

Tracks: Performance improvement; Risk; Technology; Talent

Applicable Audience: Board Member
CEO/Executive Director
CFO/Finance Director
COO
Clinic Leadership
CSBG/Org Standard
Finance Staff
HR Director/Manager
HR Staff
HS/EHS Director/Manager
HS/EHS Program Staff
IT Director/Manager
Program Director/Manager
Providers, Nurses
Quality Improvement Leaders

Prerequisites: None
CPE Credits: 1.5
Trainers:

Learning Objectives:

Session Description:

 **PRINT**

10:10-11:45 a.m.	Subrecipient Monitoring 101	Close Info ▲
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Date: 07/15/2022 10:10-11:45 a.m.
History: New
Experience: All (All levels of experience)
Advanced Preparation: None
Field of Study: Accounting
Applicable Audience: Board Member
CFO/Finance Director
COO
Finance Staff

Tracks: Financial, accounting and tax
Type: Mini
Level: Basic
Qualifies for Yellowbook?: Yes
Prerequisites: None
CPE Credits: 1.5
Trainers:



[Ciara Leahy, CPA](#)
Senior Manager, Audit

- Learning Objectives:**
1. Identify the meaning of a subrecipient.
 2. Walk through a subrecipient risk assessment.
 3. Explore best practices to help ensure a strong relationship.

Session Description:

Are you considering passing through your federal dollars to another agency? Or are you currently passing through federal dollars to another agency? If so, make sure you know what you are required to do. This session will clearly define what subrecipients are and the required regulations you must address when you have them.

 **PRINT**

10:10-11:45 a.m.	Using Surveys in Your Organization	Close Info ▲
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Date: 07/15/2022 10:10-11:45 a.m. **Tracks:** Performance improvement; Technology

Field of Study: Specialized Knowledge

Applicable Audience: COO

Clinic Leadership

HR Director/Manager

HR Staff

Prerequisites: None

CPE Credits: 1.5

Trainers:



[Daniel Bashore, Ph.D.](#)

Consultant II

Learning Objectives:

1. Explore best practices in survey design.
2. Review analysis methods.
3. Identify how to use surveys moving forward.

Session Description:

Organizational surveys can be an effective way to collect data and feedback about almost any topic or issue. In this session, we will cover best practices in survey design, administration and analysis to gather information on any number of subjects, including project status, engagement pulses and feedback/reactions.

 **PRINT**

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