

# TODAYS AGENDA

TIME	SESSION TOPIC	PRESENTER	ORGANIZATIONS	ROOM
8:45 - 9:00 AM	<b>Welcome</b>	Rollin Schuster	TANGO	16/17
9:00 - 10:00 AM	<b>Opening Panel</b> Nonprofits are Businesses, Just not the same as For-Profit Businesses	Jack Horak/Angela Bovill/Lou Golden	TANGO/Ascentria Care Alliance/ Lou Golden Consulting	16/17
10:00 - 10:10 AM	<b>Break</b>			
10:10 - 11:10 AM	<b>Healthy Change?</b> What's Happening to our Healthcare System	Rollin Schuster/Neil Roberts/Tim Elwell Jennifer Johnson/ Jessica Tracy	The Schuster Group/Qualidgm/ Southern Scripts/Color Genomics	16/17
11:10 - 11:40 AM	<b>Meet Our TANGO Partners</b>	All Partners	All Partners	Partner Lounge
11:45 - 12:45 PM	<b>Lunch/Keynote</b> Connecticut's Precarious Finances, the need for structural reform, and the Fiscal Stability Commission	Jim Smith/ Gian Carl-Casa	Webster Financial Corporation and Webster Bank/ Commission on Fiscal Stability and Economic Growth/CT Community Nonprofit Alliance (The Alliance)	16/17
1:00 - 2:00 PM	<b>Best Practices For Hiring: What You Need to Know!</b>	Kim Giangrande/ Jennifer Devine/ Tricia Reilly	Intuitive HR/CT Department of Labor/Murtha Cullina LLP	16/17
1:00 - 1:30 PM*	<b>The New Standard Trifecta – Financials, Revenue and Leases – Implementation Challenges</b>	Paul Ballasy/ John Toscano	Cohn Reznick LLP	14
1:00 - 1:30 PM*	<b>Introduction to Nonprofit Accounting: Understanding the Basics</b>	Pat Gill	Financial One Accounting Inc.	15
1:35 - 2:05 PM	<b>Compensating Directors: Navigating the Landscape</b>	Ed Spinella	Murtha Cullina LLP	14
1:35 - 2:05 PM	<b>Managing Nonprofit Endowments and Investment Portfolios</b>	Ben Kille	Private Capital Group	15
2:05 - 2:10 PM	<b>Break</b>			
2:10 - 3:10 PM	<b>Retirement Plan Update for Nonprofit Organizations</b>	Matt Cowles/ Patrick Morrissey	The Schuster Group	16/17
2:10 - 2:40 PM*	<b>The Role of 'Staff-Care' in Effective Leadership</b>	Augusto Russell/ Stacie Watson	IPG/Transformative Leadership Strategies, LLC	14
2:10 - 2:40 PM*	<b>An Ounce of Education is Worth a Pound of Technology; Securing the Un-securable</b>	Ben Karsif/Lynn Souza	Kyber Security	15
2:45 - 3:15 PM	<b>Fraud Protection: Best Practices for Keeping Your IT Systems and Internal Processes Protected Against Fraud</b>	Patrick Quinn/ Todd Burton	Thomaston Savings Bank	14
2:45 - 3:15 PM	<b>Intelligent Marketing for Nonprofits</b>	Dave Stowe	Dot Generation/Alpha Graphics	15
3:15 - 3:30 PM	<b>Closing/Raffle</b>	TANGO	All	16/17

\*There will be a 5 minute intermission after the 1:30pm and 2:40pm sessions to allow attendees to move from one room to another if they choose.

# SESSION DESCRIPTION & TIMES

**9:00 - 10:00 AM**  
ROOM 16/17

## **Nonprofits are Businesses, Just not the same as For-Profit Businesses**

This panel will explore the considerable overlap in the two types of organizations, (operationally speaking) and discuss governance and management practices in the for-profit world that nonprofits can adopt and benefit from, without abandoning their missions – The moderator (Jack Horak), and panelists Lou Golden and Angela Bovill, all have experience in both sectors and will share their thoughts, experiences, and suggestions on this important topic.

### **Guest Speakers**

**Jack Horak**, *Director*, Nonprofit Education and Consulting - TANGO  
**Lou Golden**, *Principal* - Lou Golden Consulting  
**Angela Bovill**, *President/CEO* - Ascentria Care Alliance, Worcester MA

**10:10 - 11:10 AM**  
ROOM 16/17

## **Healthy Change? What's Happening to our Healthcare System**

The US Healthcare System is undergoing unprecedented change. The convergence of escalating costs, emerging technologies and the demand for value is transforming healthcare as we know it. Our panel of experts will discuss how these changes will effect all of us.

### **Guest Speakers**

**Rollin Schuster**, *Managing Principal* - The Schuster Group  
*President & Founder* TANGO (The Alliance for Nonprofit Growth and Opportunity, Inc.)  
**Timothy Elwell, Ph.D., M.B.A.** *President/CEO* - Qualidigm  
**Jessica Tracey, CLCS, GBDS**, *Director/Enterprise* - Color Genomics  
**Jennifer Johnson**, *Vice President/Sales & Marketing* - Southern Scripts  
**Neil Roberts**, *Vice President/Underwriting and Account Management* - The Schuster Group

**11:10 - 11:40 AM**  
PARTNER LOUNGE

## **Meet Our TANGO Partners**

This will be an opportunity for you to visit our TANGO Partner Lounge where you will be able to learn about cost savings from our TANGO partners that can help your nonprofit organization thrive! Make sure that you get your raffle card stamped by at least 2 partners (in our Partner Lounge) so you're eligible for our raffle drawings at the closing session.

**11:45 AM - 12:45 PM**  
LUNCH/KEYNOTE  
ROOM 16/17

## **Connecticut's Precarious Finances, The Need for Structural Reform and The Fiscal Stability Commission**

Nonprofit organizations have felt the effect of the state's fiscal problems more than many. Nonprofits cannot simply leave the state, but businesses can if they so choose. This problem will be discussed by Jim Smith, Chairman, Webster Financial Corporation and Webster Bank Co-chair, Commission on Fiscal Stability and Economic Growth, who delivered a report and recommendations earlier this year. Also presenting will be Gian Carl Casa, (President & CEO) of the CT Nonprofit Alliance, who will discuss proposals to shift the responsibility for delivery of social services to community based nonprofit organizations.

### **Guest Speakers**

**Jim Smith**, *Chairman* - Webster Financial Corporation and Webster Bank  
*Co-chair* - Commission on Fiscal Stability and Economic Growth  
**Gian Carl-Casa**, *President and CEO* - CT Community Nonprofit Alliance (The Alliance)

**1:00 - 2:00 PM**  
ROOM 16/17

## **Best Practices for Hiring: What You Need To Know!**

The hiring process presents numerous opportunities and potential risks for employers to determine who is the best candidate for the job. Applications, background checks, drug testing, and interviews all enable employers to find the best fit for the job, but they also present potential legal liability. While employers wish to obtain as much information as possible from candidates, certain questions and lines of inquiry carry risk or may be illegal. For example, following the national trend, CT recently passed legislation prohibiting employers from asking about an applicant's salary history. This seminar will highlight risks in the hiring process and discuss best practices for hiring.

### **Guest Speakers**

**Kim Giangrande**, *Principal* - Intuitive HR  
**Patricia Reilly**, *Partner* - Murtha Cullina LLP  
**Jennifer Devine**, *Staff Attorney III* - CT Department of Labor

# SESSION DESCRIPTION & TIMES

**1:00 - 1:30 PM**  
ROOM 14

## **The New Standard Trifecta - Financials, Revenue and Leases - Implementation Challenges**

In this session we will have a discussion on the impending accounting standards for revenue recognition, leases, and not-for-profit financial statement presentation, including what these standards mean, opportunities and challenges in application, tips for practical implementation and what you should do now to prepare.

**Guest Speakers**

**Paul Ballasy**, CPA, Partner - Cohn Reznick LLP  
**John Toscano**, CPA, Partner - Cohn Reznick LLP

**1:00 - 1:30 PM**  
ROOM 15

## **Introduction to Nonprofit Accounting: Understanding the Basics**

This session will focus on understanding the basics of Nonprofit Accounting and recognizing the key differences between For-Profit Corporations and Nonprofit Organizations. We will also cover the differences in Financial Statement presentation, Tax returns, key types of Nonprofit Revenue and proper financial stewardship in order to withstand certain unexpected situations that are common in the nonprofit world.

**Guest Speaker**

**Patrick Gill**, CFO/Business Development Officer - Financial One Accounting Inc.

**1:35 - 2:05 PM**  
ROOM 14

## **Compensating Directors: Navigating the Landscape**

Would compensating directors be helpful or heretical? We have always advised tax-exempt organizations to see their directors as human capital investments, infusing diversity, expertise and commitment into their missions and activities. In this increasingly complex and challenging environment, the volunteer board model may merit reconsideration. We will discuss the potential advantages and disadvantages of compensating directors including a quick review of legal, optics and other issues to consider should you wish to explore this potential paradigm shift.

**Guest Speaker**

**Ed Spinella**, Partner - Murtha Cullina LLP

**1:35 - 2:05 PM**  
ROOM 15

## **Managing Nonprofit Endowments and Investment Portfolios**

This is a great opportunity for not-for-profit organizations with existing endowments and investment portfolios to learn more about current trends in managing portfolios. From fiduciary governance and socially responsible investing as well as current thinking on asset allocation and spending policy, guidance will be provided with essential information to have deep discussions and make fully informed decisions with your finance investment committees and outside advisors.

**Guest Speaker**

**Ben Kille**, Co-Founder, Financial Adviser - Private Capital Group

**2:10 - 3:10 PM**  
ROOM 16/17

## **Retirement Plan Update for Nonprofit Organizations**

In this session we will have a discussion regarding retirement plan trends and fiduciary best practices. In the wake of the now stalled DOL fiduciary rule, increased IRS/DOL audit activity, and participant lawsuits against plan sponsors involving plan fees and investments, retirement plan management for plan fiduciaries has become increasingly more complex and sophisticated. The fiduciary burden is daunting, but we will present solutions to help you manage these responsibilities and create better retirement plan outcomes for your plan participants.

**Guest Speakers**

**Matthew Cowles**, Retirement Plan Consultant - The Schuster Group  
**Patrick Morrissey**, Retirement Plan Consultant Accredited Investment Fiduciary AIF® - The Schuster Group

# SESSION DESCRIPTION & TIMES

**2:10 - 2:40 PM**

ROOM 14

## **The Role of 'Staff-Care' in Effective Leadership**

Most of us know something about self-care, but may not think about the concept of 'staff-care'. In this session, we will focus on the practice of staff-care, what it is and why it's important. Through interactive dialogue, we will share strategies and ideas that any leader can use with his/her team to support a healthy work environment. And for those leaders who are looking to shift their culture, learn how a focus on staff-care can provide an essential but often overlooked element in that process.

**Guest Speakers**

**Augusto Russell**, *Principal* - Insurance Provider Group

**Stacie Watson**, *Partner* - Transformative Leadership Strategies

**2:10 - 2:40 PM**

ROOM 15

## **An Ounce of Education is Worth a Pound of Technology; Securing the Un-securable!**

Cyber terrorism has become a multibillion dollar industry, larger than many of the industries upon which our country was built. As such, businesses and individuals need to be vigilant every day to ensure that they are not the next victim of a cyber-attack. One of the greatest risks to your network being breached is through your employees. Employees often run the risk of compromising a password, losing a device with critical information on it, or falling victim to a phishing attack. In addition to technology tools, a comprehensive security program must involve a training program to educate your staff on the dangers of these common human errors. In this session, we will provide guidance and tips on properly educating your staff to avoid the pitfalls which could cause your organization great harm.

**Guest Speakers**

**Ben Karsif**, *Senior Security Engineer* - Kyber Security

**Lynn Souza**, *Partner* - Kyber Security

**2:45 - 3:15 PM**

ROOM 14

## **Fraud Protection - Best Practices for Keeping Your IT Systems and Internal Processes Protected Against Fraud**

This session will include tips and information about how nonprofits can keep their IT systems protected and what internal controls are recommended to protect organizations against fraud from both within their organization and outside of their organization. In this session you will gain insight on best practices for protecting important data - both your employees' as well as your clients' information - along with current cyber security issues affecting nonprofit organizations. Information for best practices for internal controls regarding the handling of cash management will be presented which will include tips on account reconciliation, wires, ACH, remote deposit capture, and how to set up your online banking to avoid fraud.

**Guest Speakers**

**Todd Burton**, *VP/Retail Banking and CRA Officer* - Thomaston Savings Bank

**Patrick Quinn**, *VP/Information Technology Officer* - Thomaston Savings Bank

**2:45 - 3:15 PM**

ROOM 15

## **Intelligent Marketing For Nonprofits**

In this session we will cover some important information when it comes to building and maintaining a nonprofit brand. This will include a number of touch points that effect brand identity and brand integrity, how to integrate this information into your marketing efforts and enhancing your fundraising by integrating this information. We will discuss the use of print, mail, graphics and technology for marketing and brand building and also show how the integration of technology can help build in cost certainty, cost savings, institutional knowledge and quality into everything you do with your marketing.

**Guest Speaker**

**Dave Stowe**, *EVP and Director of Sales and Marketing* - Dot Generation/Alpha Graphics