

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



CPE: 8 hours (includes up to 4.00 hours of A&A and/or 1 hour of Ethics)

Yellow book: 1 hour

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

Economy, Demographics, and Your Donor Community

[Bob Mims, CPA, The Knowledge Institute, LLC](#)

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

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

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

[Karen Bodach, CPA, Forvis Mazars](#) and [Ryan Kauzlick, Forvis Mazars](#)

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

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

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

9:30–9:40 a.m. Break (10 mins)

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

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

[Megan Nail, NFP](#)

Nonprofit compensation isn't designed in a vacuum—it requires the right balance of mission, market data, and governance. In this practical and engaging session, we will break down how thoughtful pay design and disciplined decision-making can help organizations attract talent, manage risk, and support long-term impact.

Whether you're a small nonprofit navigating pay decisions with limited resources or a larger organization refining programs for leadership and staff, this session delivers actionable insights you can apply immediately.

During this webinar, you will explore:

- How to design competitive, mission-aligned compensation programs

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

B. Friction or Flow: Multigenerational Hybrid Shifts

[Judy Hissong, Nesso Strategies](#)

Five generations in your organization combined with different working locations creates a necessity for setting expectations, and developing skills in feedback, resilience, communication, and technology. We will explore how generational perspectives shape behavior and create assumptions in hybrid environments, along with the antidote to those assumptions.

Objectives:

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

C. Charitable Giving Under OBBB: Implications for Donors and Nonprofits

[Casse Tate, CPA, CAP, Katz, Sapper & Miller](#)

The One Big Beautiful Bill (OBBB) introduces several key tax provisions with implications for not-for-profit organizations. Most significant is a provision that affects the deductibility of charitable contributions for individuals who itemize their deductions. Additionally, new opportunities have arisen for charitable deductions for non-itemizers.

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

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

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

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

A. AI, Risk, and Responsibility: What Every Not-for-Profit Leader Must Know Now

[Brian Beck, Proxurve](#), and [Joe Slater, Gleaners Food Bank](#)

Artificial Intelligence is rapidly transforming not-for-profit organizations—accelerating efficiency, improving decision-making, and enhancing mission delivery. But as highlighted throughout this session, AI is both a force multiplier and a risk multiplier.

This session will help not-for-profit leaders, finance professionals, and board members understand how to safely and strategically adopt AI while managing growing cybersecurity, compliance, and governance risks. Attendees will explore common barriers to AI adoption, key security vulnerabilities, and the importance of aligning AI initiatives with measurable business outcomes.

Practical insights will focus on building a secure foundation—covering data protection, identity controls, governance frameworks, and workforce readiness—so organizations can confidently embrace AI without compromising trust, mission integrity, or regulatory compliance.

B. Rethinking the Finance & HR Functions: Why Fractional is Gaining Ground

[Amy Hehman, PHR, SHRM-CP, Barnes Dennig](#) and [Christa Woelfel, CPA, Barnes Dennig](#)

Explore how nonprofits are moving beyond transactional support models toward embedded fractional finance and HR leadership that delivers strategic insight, senior-level expertise, and true partnership. This session will examine when fractional CFO and CHRO support makes the most sense — from navigating growth, leadership transitions, and compliance challenges to managing budget constraints — and how organizations can determine the right fit for their needs. Through real-world case studies, attendees will gain insight into the measurable impact of successful fractional partnerships, as well as common pitfalls related to scope, culture, and expectations.

C. GAAP Update and Refresher (A&A)

[Daniel Waninger, CPA, Forvis Mazars](#) and [Sara Sears, CPA, Forvis Mazars](#)

This session will review recently issued GAAP pronouncements which may impact nonprofit organizations, give an overview FASB projects in process, and include a discussion of common errors in nonprofit accounting and reporting.

12:10–12:40 p.m. Lunch (30 mins)

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

Culture in Motion: Leading Change that Brings People Along

[Judy Hissong, Nesso Strategies](#)

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

Objectives:

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

1:40–2:00 p.m. Sponsor Session (20 minutes)

AI for Taxes: State of the Art Today (Sponsored by FlyFin AI)

[Jaideep Singh, FlyFin AI](#)

Detailed overview with a live case study of how AI is being applied across the tax ecosystem today—from OCR and large language models to workflow automation and review assistance. This session separates hype from reality and demonstrates where AI delivers real, measurable value for CPA firms right now, using real-world examples to increase tax filing efficiency.

2:00–2:10 p.m. Break (10 minutes)

2:10–3:20 p.m. Breakout Sessions (70 minutes)

A. Fraud Protection & Mitigation

[Penelope \(Penny\) Lewis, CFP, Huntington National Bank](#), [Jim Kramer, Cherry Bekaert Advisory LLC](#), [Rebekah Payne, CPA, Cherry Bekaert Advisory LLC](#)

Explore practical strategies to prevent, detect and respond to fraud across financial operations within your not-for-profit organization. This session connects banking controls with accounting safeguards and the IT capabilities that enable them. Attendees will leave with ideas for reducing exposure and improving controls to prevent losses.

B. Using Data Effectively

[Bob Mims, CPA, The Knowledge Institute, LLC](#)

Session Description Coming Soon

C. Navigating Uniform Guidance and Single Audits: Overview & Update (A&A – Yellow Book)

[Eric Wildermuth, CPA, Crowe](#) and [Lucy Hobson, CPA, Crowe](#)

The requirements of Uniform Guidance can feel overwhelming for many not-for-profit organizations that receive federal grants. This session provides a high-level overview of Uniform Guidance fundamentals and related compliance requirements, along with a discussion of recent updates to the Compliance Supplement.

3:20–3:30 p.m. Break (10 minutes)

3:30–4:40 p.m. General Session (70 minutes)

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

[Karl Ahlrichs, ExpertSpeaks](#)

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

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

Adjourn