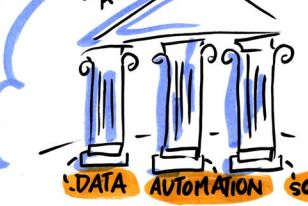


NATIONAL ASSOCIATION CONFERENCE

2023

SYSTEM SELECTION & AUTOMATION:
IMPROVING CLIENT ENGAGEMENT FOR YOUR ASSOCIATION
ANDY HARLEMAN, BART HAWLEY



ASK QUESTIONS
IDENTIFY NEED FOR **SOS** PROJECTS



- SOME COMMON ISSUES:
- MANUAL AP PROCESS
 - LARGE GL STRUCTURE
 - STAFF LACK SKILLS

LISTEN MORE
TALK LESS

COMPONENTS:

- PROCESS WALKTHROUGHS
- DEVELOP FUNCTIONAL REQUIREMENTS
- LOOK AT GAPS

RATE PRIORITIES

UNDERSTAND PROCESS & THEN LOOK FOR VENDOR



- WHAT ARE YOUR:
- PAIN POINTS
 - NEEDS
 - BUDGET

RFP

VENDOR RESPONSE ANALYSIS

CONTRACT NEGOTIATION

DEVELOP A SCRIPT



SOMETIMES YOU DON'T KNOW WHAT YOU DON'T KNOW...

KEEP UP WITH TECHNOLOGY

PARTLY CLOUDY (HYBRID)

PARTNERING FOR SUCCESS

TOOLS WORK WELL TOGETHER

USING entry level TOOL?

MAY BE TIME TO GET OFF...

REOP: FAILURE

BE A RESISTER ON THIS

JUST TOOLS... THINK ABOUT WHO IS HELPING YOU BUILD YOUR STRUCTURES & SYSTEMS

WE DO ONE THING WELL.



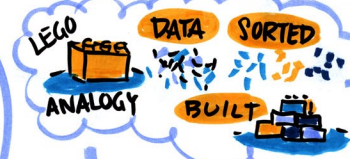
LIKE APP STORE

OUR MISSION IS ABOUT ELEVATING PEOPLE'S WORK

LOOKING TO THE FUTURE: HOW ASSOCIATIONS CAN USE DIGITAL TO DRIVE GROWTH
BEN AASE, TROY HOLLINGS

DIGITAL DATA AUTOMATION SOFTWARE

WE ARE A TRADE ASSOCIATION



THEMES

- AD HOC → 80% AUTOMATED
- DEMOCRATIZATION of "LOW CODE" AI MODELS IN EXISTING TOOLS
- PROLIFERATION OF LARGE LANGUAGE MODELS & "AI AS A CO-PILOT"

REAL TIME DATA CONCUR TRANSACTION ANALYSIS

CHATGPT OUTLIER REVIEW

POWER B.I.

PROPENSITY MODELS



INFLUENCERS & SEGMENTS

AI AS CO-PILOT
TRAINED ON ENGLISH.

WRITE EMAIL TO NEW EMPLOYEE? YES!

CAN YOU PUT THIS IN BULLET POINTS? YES.

ANYONE WHO KNOWS ENGLISH CAN USE THIS

WHAT IS CLA PER DIEM?

AI IS LIKE A really SMART INTERN

ENGLISH IS THE NEW PROGRAMMING language

ASK US. WE love TO HELP!

USED TO HAVE TO hire DATA SCIENTIST FOR THIS!

NOW POWER B.I. CAN DO IT

TAKEAWAYS:

PREPARE. BE AWARE. UNDERSTAND DATA & DIGITAL.

NATIONAL ASSOCIATION CONFERENCE

2023

EXPECT THE UNEXPECTED: A RISK MANAGEMENT STORY

BEN AASE, FRANK RUDENICZ, GARY LABRANCHE

RIMS CONFERENCE 2023 AFFECTED BY MASS SHOOTING

ATLANTA

RISK WORLD - 10,000 ATTENDEES

RISKIES - SWIFTIES

WE HAD A PLAN FOR RIMS IN ATLANTA SAFETY

IT WAS GOING GREAT!

THEN ACTIVE SHOOTER SITUATION

AMY ST. PIERRE LOST HER LIFE & 4 OTHERS SHOT

IF YOU CAN'T PREVENT, YOU MUST PREPARE.

CRISIS PLANS MUST ADAPT

CREATE plan ONE YEAR IN ADVANCE

ONLY AS STRONG AS WEAKEST LINK

CRISIS PLAN IS OUTER LAYER

BUILD RISK AWARE CULTURE

COMES WITH A COST...

MUST HAVE CITY-WIDE CRISIS PLAN FOR CONVENTION

MUST BE SIMPLE, DIGITAL, & SHAREABLE

KEEP THE WALKIE TALKIES!

MUST TRAIN TO BUILD RAPID RESPONSE

YOU CAN'T PLAN FOR AN EVENT IN A SILO

MUST INCLUDE LAW ENFORCEMENT

ENHANCE COMMUNICATION WITH HOUSING & SHUTTLE PARTNERS

RELATIONSHIPS WITH POLICE & PARTNERS ARE KEY

WHAT IF?

GREEN SCREEN MESSAGE

USED APP + EMAIL BLAST

EVERYTHING HAPPENING SIMULTANEOUSLY

TRANSPORTATION & HOTELS ON LOCKDOWN

BUILD RISK AWARE STAFF

TRANSPARENCY IS KEY

MUST THINK OF POTENTIAL COSTS

RUN HIDE FIGHT

YOUR BEST ALLY IS TIME

AFTER EFFECTS lasts FOR YEARS

THINK THROUGH COVERAGES

EMBRACE THE CHANGE

TARA FRAZER

CHANGE IS THE **NORM**

DO YOU HAVE BUTTONS?

UPROAR WHEN APPLE GOT RID OF HOME BUTTON

THE HUMAN IMPACT OF CHANGE

CHANGE BEHAVIORS:

- ACTIVE RESISTER
- NEUTRAL
- PASSIVE RESISTER
- PASSIVE SUPPORTER
- ACTIVE SUPPORTER

YOU CAN BE ALL 5!

HUMANS ARE EMOTIONAL

ASKING QUESTIONS GETS ME TO ACTIVE

CHANGE MANAGEMENT IS ALL ABOUT PREPPING, EQUIPPING & SUPPORTING YOUR PEOPLE.

FRAMEWORK:

- ENGAGE
- COMMUNICATE
- TRAINING
- ADOPTION

CHANGE IS LOCAL

- CHANGE AGENT
- ADVOCATE
- FOLKS IN OFFICE
- CHAMPION

EXCITING INTERRUPTION

STUPID WHO MOVED MY CHEESE?!

HAVE SUPPORT SYSTEM

FEAR OF UNKNOWN IS REAL

GET TO **CELEBRATION!**

NONPROFIT TAX UPDATE: 2023

MELISSA STRUCK

COMPLIANCE INITIATIVES

- WORKER MISCLASSIFICATION
- RETIREMENT PLANS
- 990-N FILINGS

AUDITS HAVE INCREASED

REVENUE & EXPENSE DEEP DIVE

EXEMPTIONS ISSUES

CALL YOUR TAX PROFESSIONAL!

- INDEPENDANT CONTRACTORS
- COMPENSATION

RED FLAGS?

- LATE FILINGS
- WHISTLEBLOWERS
- NOTICES
- MATERIAL DIFFERENCES

LOOK INTO ALLOCATION OF EXPENSES

509(C)(3) SUPPORTING ORGANIZATIONS

GROUP EXEMPTIONS

NATIONAL ASSOCIATION CONFERENCE

2023

ECONOMIC OUTLOOK for 2023

NAT BARTHOLOMEW, PETER HOLUPCHINSKI

IF YOU'VE SEEN ONE ASSOCIATION, YOU'VE SEEN ONE ASSOCIATION...
 WE WORK WITH BEST OF BEST ACROSS ALL SECTORS

ARE WE IN THE RIGHT place?

INVESTMENT POLICY STATEMENT

TIME HORIZON

CASH

ESG/SRI

INTEREST RATES

RESERVES?

SHOULD I PAY DOWN DEBT?

NO.

CASH MANAGEMENT

- MONEY MARKETS
- LADDER INVESTMENTS
- BONDS

OPERATIONAL, ST, LT

LOOKING BACKWARDS

2020 JAN

2020 MARCH

HOME PRICES

TODAY

2023 SEPT.

INTEREST rates BACK TO NORMAL

WHAT ARE YOU SPENDING MONEY ON?

TREASURY YIELDS ON DOWNWARD TREND

STOCKS UP

- AI OPTIMISM
- AMAZON
- TESLA
- MICROSOFT

TOP HEAVY

INTEREST rates = 0

LOOKING AHEAD

BUT...

SOME ON WALL STREET AREN'T buying IT.

HISTORICAL RECESSION INDICATOR IS FLASHING

FED HAS PAUSED...

HARD TIMES for BONDS

BOND YIELDS = GOOD INFLATION = GOOD FOR BOND

VALUATIONS stretched BUT CONTINUE TO LOOK GLOBALLY STAY THE COURSE

THE ONLY CONSTANT IN MARKETS IS CHANGE

BONDS

2022 HISTORIC DOWN year

TREASURY YIELDS ON DOWNWARD TREND

STOCKS UP

- AI OPTIMISM
- AMAZON
- TESLA
- MICROSOFT

TOP HEAVY

DEMISTIFYING the DIGITAL JOURNEY for ASSOCIATIONS

BEN AASE, TROY HOLLINGS.

DIGITAL Transformation

- PAPERLESS
- UNWANTED
- PORTABLE
- INTEGRATION
- BUZZ WORD

DATA CLIENTS

WE CAN AUTOMATE processes

- SOFTWARE INTEGRATION
- DATA MODERNIZATION
- AUTOMATION DEVELOPMENT

SOME DATA & SYSTEMS UNCONNECTED

SOME INTEGRATION & SYSTEMS IN place

MAKE IT STOP! 400 EMAILS

ACTIVELY DEPLOYING AI

JUST START THE CONVERSATION

FIND LOW HANGING FRUIT

WHERE DOES THE DATA LIVE?

DATA ENGINEERING

DATA ANALYTICS

HOW HARD IS IT TO GET THE DATA?

WHITEBOARD, WIREFRAME, PROTOTYPE, AUTOMATE, PRODUCTION

GO S-L-O-W TO start

DATA SCIENCE

INVEST IN chat GPT?

DIGITAL LIFECYCLE

CRAWL → WALK → RUN

REDUCE CHURN

IMPROVE OUTCOMES

MONETIZE VALUE PROPOSITION

IMPROVE MEMBER EXPERIENCE

LOWER RISK

REDUCE COSTS

IMPROVE EMPLOYEE EXPERIENCE

IMPROVE GROWTH VELOCITY

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NATIONAL ASSOCIATION CONFERENCE

2023

CYBER SECURITY UPDATES FOR NONPROFITS

RANDY ROMES

HAVE A PLAN

PASSWORD: CHANGE EVERY 90 DAYS SUMMER 2023

AUDIT & ACCOUNTING UPDATE:

MELISSA STRUCK

I WAS A PROFESSIONAL STUDENT!
TEACHER → IT CONSULTANT
WE HAD TO WORK TOGETHER
BE PHYSICALLY & MENTALLY PREPARED
ZERO HERO

PHISHING BUSINESS EMAIL CAMPAIGN
1 HR., 12 MIN. FOR THEM TO USE MALICIOUSLY

YOUR VERIZON BILL IS DUE
DANCING DINAS.COM

JAVA IS ON EVERYTHING LOG4J VULNERABILITIES
CLICK TAKEOVER CLEAR INVENTORY
USE loooong NATURAL PASSPHRASES WITH NO EXPIRATION
THE PACKERS ALWAYS BEAT THE BEARS!

STANDARDS CURRENT EXPECTED CREDIT LOSSES (CECL)
How to evaluate LOSSES

SAS 145: WE NEED TO CONSIDER I.T. RISKS more

BE PREPARED FOR EVERYTHING

KNOW YOUR ENEMY

CREDENTIAL HARVESTING & PASSWORD GUESSING
ATTACKS ON OFFICE365
FRAUDSTERS impersonate EMPLOYEES, SERVICES

MFA IS IMPORTANT

RANSOMWARE

HOSPITAL SHUTDOWN FOR 2 WEEKS
WAITED TO PAY & TRIED TO FIX before PAYING \$17,000

DISASTER DISCOVERY & BUSINESS RECOVERY

HAVE A PLAN & PRACTICE THE PLAN

FORWARD looking

WHAT ALLOWANCE IS APPROPRIATE?
WHAT DO WE EXPECT IN THE future?

CERTAIN TRIGGERS EXIST

ACCESS MODIFICATIONS
BREACH
DATA LOSS

EVERYTHING is interconnected
INTERNET OF THINGS

280 DAYS TO DISCOVER DATA BREACH

BROWSER, PHONE, & TABLETS DO DIFFERENT LOGINS

IT NOT EQUIPPED TO PERFORM INCIDENT response

RANSOMWARE CONTINUES TO evolve

WE USE LASTPASS

NEED: PEOPLE RULES TOOLS

VENDOR & PRODUCT AGNOSTIC

HAVE ALL EMAILS... YOU DON'T KNOW WHAT THEY HAVE!

LAYERS OF CONTROL
YOU ALL HAVE A ROLE

RETENTION TIME & STORAGE limits

E5 LICENSING IS A MUST
IF YOU DELETE... IT'S STILL THERE!

DO WE USE IT?
IS OUR VERSION AFFECTED?
WHAT ARE WE GIVING SOFTWARE ACCESS TO?

ONE BEST WAY DONE BY ALL TIL THE NEXT BEST WAY IS FOUND

MINIMUM access
LESSER RIGHTS

OPERATIONAL DISCIPLINE
GIVE EXCEPTION AN EXPIRATION!

RANSOMWARE IS LAST ACT!

PREPARE, OPERATE, TEST.

EXPECT GREATER emphasis ON I.T.
ADDITIONAL STEPS IN AUDIT

