







Sunday, October 14				
Time	Minutes	Technology	Finance	Human Resources
6:45 AM - 1:30 PM		<b>Optional Activity: Golf Outing</b>		
11:00 AM - 3:30 PM		<b>Registration Opens</b> Registration Desk Location: TBD		
12:00 PM - 2:25 PM	145	Is This Your First FTPI? First Timers Meeting with Executive Committee / Mentors  Finance: Barry Reis, Jewish Federation of Cleveland Technology: TBD HR: TBD  Location: TBD		
12:00 PM - 5:00 PM		Sponsor Set up - Exhibit Hall		

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2:30 PM- 3:20 PM	50	Welcome by Duke Nave, Bob Ellsworth and Sari Ferro 2018 FTPI Co-Chairs		and 2018 FTPI Platinum Sponsor  Kevin McGrath Executive Vice President Client Advancement
3:30 PM - 5:00 PM	90	<b>Session 1</b>	<b>Session 1</b>	<b>Session 1</b>
		General IT Innovation Session #1 Technology Transformation at your Federation  Speaker: TBD Location: TBD CPE Credits: 1.5	City Size Breakout  Location: TBD CPE Credits: 1.5	Because Great Workplace Culture Matters - Insights into employee surveys conducted with over 55 Jewish non-profit organizations  Speaker: Gail Cooks Location: TBD CPE Credits: 1.5
5:00 PM - 5:20 PM	20	<b>BREAK</b>		


Sunday, October 14					
Time	Minutes	Technology		Finance	Human Resources
		Session 2		Session 2	Session 2
		IT Infrastructure/ Ops/ Cyber	Data/CRM		
5:30 PM - 6:20 PM	50	Azure for Good Why every Federation can take advantage of the \$5k credit in Azure  Speaker: TBD Location: TBD CPE Credits: 1.0	Become a Data Driven Federation- a conversation with Steve MacLaughlin, VP of Data Analytics at Blackbaud  Speaker: TBD Location: TBD CPE Credits: 1.0	Overseas Payments/ Tax Filings Pitfalls, tips, and best practices  Speaker: Andrew Pertuzzelli or Anya Martinez Location: TBD CPE Credits: 1.0	Tips& Techniques for effective recruiting  Speaker: Amelia Zwecher Location: TBD CPE Credits: 1.0
6:30 PM - 7:30 PM	60	2018 FTPI Keynote Speaker  Introduction by:  Jacob Solomon President & CEO-Jewish Federation of Greater Miami  Keynote Speaker: Bob Diener Co-founder & President Getaroom.com Co-founder Hotels.com  Location: TBD CPE Credits : 1.5			
7:30 PM		Sponsor Exhibit Hall Opens Location: TBD			
7:30 PM - 9:30 PM	120	Cocktail Reception Sponsored By:  Location: Bayfront			

<b>Monday, October 15</b>				
<b>Time</b>	<b>Minutes</b>	<b>Technology</b>	<b>Finance</b>	<b>Human Resources</b>
7:00 AM - 8:00 AM	60	Breakfast Location: Bayfront		
8:10 AM - 9:00 AM	50	<b>Session 3</b>	<b>Session 3</b>	<b>Session 3</b>
		Building Defense on Known Good  Speaker: David Kennedy Location: TBD CPE Credits: 1.0	Your responsibility to your employee's future: pension plan strategies  Speaker: TBD Location: TBD CPE Credits: 1.0	ACA Update and report on benefits landscape  Speaker: Doug Rabbino Location: TBD CPE Credits: 1.0
9:10 AM - 10:40 AM	90	<b>Session 4</b>	<b>Session 4</b>	<b>Session 4</b>
		Developing an Analytics program at your Federation- Regardless of your city size  Speaker: TBD Location: TBD CPE Credits: 1.5	City Size Breakout  Location: TBD CPE Credits: 1.5	On-Boarding Best Practices for New Employees  Speaker: Gail Cooks Location: TBD CPE Credits: 1.5
10:40 AM - 11:00 AM	20	Break Location: TBD		
11:10 AM - 12:40 PM	90	Joint Session 1 Creating a Culture of Respect  Speaker: Jessica Cortez, Davis & Gilbert Location: TBD CPE Credits: 1.5		

Monday, October 15				
Time	Minutes	Technology	Finance	Human Resources
12:50 PM - 1:50 PM	60	Plated Lunch Business meeting: Election of new Executive Committee, Bylaws & amendments Location: Bayfront		
2:00 PM - 2:50 PM	50	Session 5	Session 5	Session 5
		Florida- Israel Business Accelerator Tech Company Introduction  Speaker: Florida Business Accelerator Location: TBD CPE Credits: 1.0	FASB & Tax Updates  Speaker: Andrea T. Mills, FMA Location: TBD CPE Credits: 1.0	Hiring/ Firing those openly opposed to your federation's mission. What you can and shouldn't do  Speaker: Jessica Cortez Location: TBD CPE Credits: 1.0
2:50 PM - 3:10 PM	20	Break		
3:15 PM - 5:15 PM	120	Sponsored By: <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 10px;"> <div style="text-align: center;">  <p>FIDUCIARY TECHNOLOGY PARTNERS - PLANNED GIVING SOLUTIONS -</p> </div> <div style="text-align: center;">  <p>maibontic Your think tank to stay ahead</p> </div> <div style="text-align: center;"> <p>Professional Development Event Creating A Yes Culture</p> <p>Speaker: Galen Emanuele ShiftYes Location: TBD CPE Credits: 2.5</p> </div> <div style="text-align: center;">  </div> </div>		
5:15 PM		Free Evening For All Participants   Dinner On Own		

<b>Tuesday, October 16</b>				
<b>Time</b>	<b>Minutes</b>	<b>Technology</b>	<b>Finance</b>	<b>Human Resources</b>
7:00 AM - 8:00 AM	60	Breakfast Location: Bayfront		
8:00 AM - 9:30 AM	90	<b>Session 6</b>		<b>Session 6</b>
		IT Infrastructure/ Ops/ Cyber	Data/CRM	Best Practices: Financial Policies  Speaker: TBD Location: TBD CPE Credits: 1.5
		Federation Office 365 Showcase  Speaker: Dan Strom Location: TBD CPE Credits: 1.5	Blackbaud CRM Update with Blackbaud and JFNA  Speaker: Stephanie CSR & JFNA Location: TBD CPE Credits: 1.5	
9:40 AM - 10:30 AM	50	<b>Session 7</b>		
		Understanding and Assessing the Cybersecurity Risks in Your Federation  Speaker: Kevin Carpenter- RSM US Location: TBD CPE Credits: 1.0		HR Best Practices (closed session)  Speaker: TBD Location: TBD CPE Credits: 1.0
10:30 AM - 10:50 AM	20	Break		

Tuesday, October 16					
Time	Minutes	Technology		Finance	Human Resources
11:00 AM - 12:30 PM	90	How to manage technology change at your Federation OR Federation Technology Showcase with focus on change management  Speaker: Jennifer Moschella (Papersave) Location: TBD CPE Credits: 1.5		Joint Session 2 Legal Update  Speaker: Jonathan Segal Location: TBD CPE Credits: 1.5	
12:40 PM - 1:40 PM	60	Buffet Lunch Location: Bayfront			
12:40 PM - 1:40 PM	60	Executive Committee meeting during lunch Location: TBD			
1:50 PM - 2:50 PM	60	<b>Session 8</b>		<b>Session 8</b>	<b>Session 8</b>
		IT Infrastructure/ Ops/ Cyber	Data/CRM	Current philanthropic landscape and its financial impact  Speaker: RenPSG Location: TBD CPE Credits: 1.0	20 things people may expect of you as an HR leader  Speaker: Jonathan Segal Location: TBD CPE Credits: 1.0
		Digital Document Management Case Study and Panel  Speaker: Robb Q Location: TBD CPE Credits: 1.0	Good data hygiene How to ensure accurate, actionable, and effective data for your Federation (data entry, data audits, data integrity)  Speaker: Samantha Katzen / Anita Lewicke Location: TBD CPE Credits: 1.0		

Tuesday, October 16				
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		<b>Session 9</b>	<b>Session 9</b>	<b>Session 9</b>
3:00 PM - 4:30 PM	90	Practical advice for managing a data breach Speaker: TBD Location: TBD CPE Credits: 1.5	City Size Breakouts  Location: TBD CPE Credits: 1.5	Mindfulness  Speaker: Linda Location: TBD CPE Credits: 1.5
4:30 PM - 6:30 PM	120	Program: TBD		
6:30 PM - 7:00 PM	30	Boarding Process		
7:00 PM - 10:00 PM	180	2018 Financial & Technology Professionals' Institute   RenPSG Signature Event Evening Yacht Dinner Cruise 2018 Platinum Sponsor		



Wednesday, October 17			
Time	Minutes	Technology	Finance
7:00 AM - 8:00 AM	60	Breakfast Location: Bayfront	
8:00 AM - 9:00 AM	60	<b>Session 10</b>	
		<p>Salesforce Showcase How Federations are utilizing salesforce</p> <p>Speaker: Robb Location: TBD CPE Credits: 1.0</p>	<p>Social Impact Funding</p> <p>Speaker: TBD Location: TBD CPE Credits: 1.0</p>
9:10 AM - 10:10 AM	60	<b>Session 11</b>	
		<p>Optimizing your IT Staff and Providing Excellent service utilizing Service Desk &amp; project tools</p> <p>Speaker: TBD Location: TBD CPE Credits: 1.0</p>	<p>Optimizing the Finance team - How Federations utilize CRM and other technology to optimize Financial processes</p> <p>Speaker: Jessica (Allen, Samantha, Jon, DC, Tracy - Pitt) Location: TBD CPE Credits: 1.0</p>
		<p>Like it or not, cemeteries are/will be in your future</p> <p>Speaker: Noah Levine, David Sarnat &amp; TBD Location: TBD CPE Credits: 1.0</p>	
10:10 AM - 10:30 AM	20	Break	

Wednesday, October 17				
Time	Minutes	Technology		Finance
		Session 12		Session 12
		IT Infrastructure/ Ops/ Cyber	Data/CRM	
10:40 AM - 11:40 AM	60	Infrastructure/Ops/Cyber Kitchen Sink Roundtable  Speaker: TBD Location: TBD CPE Credits: 1.0	Data/CRM Kitchen Sink Roundtable- Closing Session Speaker: TBD Location: TBD CPE Credits: 1.0	Spending Policy Analysis  Speaker: Carol Location: TBD CPE Credits: 1.0
11:45 AM - 12:15 PM	30	Wrap Up Meeting Location: TBD		
12:15 PM		End of 2018 FTPI See You Next Year!		