



### **Program Overview**

- The FTPI (Finance, Technology, People and Innovation) Annual Conference creates a forum to provide outstanding educational, programming and networking opportunities for Federation key staff in the following roles:
  - Chief Financial Officers
  - Controllers
  - Directors of Finance
  - Chief Information Officers
  - Top-level Information Technology Professionals
  - Data Analytics and Database Professionals
  - Chief Operating Officers
  - Senior Human Resource Leaders
- The FTPI Annual Conference is under the auspices of The Jewish Federations of North America (JFNA). JFNA represents 147 Jewish Federations and over 300 Network communities, which raise and distribute more than \$3 billion annually for social welfare, social services and educational needs.
- The Federation system is among the top 10 charities in the world that looks to protect and enhance the well-being of others, each year raising over \$900 million annually and distributing over \$2 billion from our foundations and endowments.
- Collectively, the Federation system represents more than \$21 billion in endowment fund assets, which includes endowment, foundation and donor advised funds under management.
- Approximately 200 participants are expected from Federations across North America.
- This conference is the only one of its kind in the Federation system that provides the opportunity to access top level management in Finance, Technology and Human Resources.

### **Program Structure**

- Program sessions are primarily separated into three categories: Finance, Technology and Human Resources. Participants may select any open session to attend.
- All sessions will be held at the Centre Mont-Royal on the third and fourth floors of the conference center.
- Meals and breaks are held on the third and fourth floors.
- Delivery Method: Group-Live
- Dress Code during the conference is business casual. Conference rooms are often cold so please bring an extra layer.

## **Schedule**

- Sunday September 8<sup>th</sup>:
  - 12:00 pm- Welcome to JFNA Orientation and Luncheon. There is no charge for the luncheon but advance registration is required.
  - 2:30 pm- FTPI Annual Conference opening session
  - Sunday evening- An opening night dinner reception will be held.
- Tuesday September 10<sup>th</sup>:
  - The RenPSG Signature Event will be held at La Toundra in the heart of Parc Jean Drapeau, the former site of Expo 67 – the 1967 World’s Fair which put Montreal on the map, home today to Circuit Gilles Villeneuve, Montreal’s Grand Prix racetrack, and the Montreal Casino. The event will include dinner, drinks, dancing, and transportation to and from the hotel.
  - Buses will begin departing from the hotel at 6:30 pm as they fill up and will begin returning back from La Toundra at 9:30 pm. Dress code for evening event is dressy casual.
- Wednesday September 11<sup>th</sup>:
  - 12:30 pm- The FTPI Annual Conference concludes
  - 12:30-4pm- User Group sessions for FedWeb, Blackbaud CRM (J-BUG) and Salesforce. The FedWeb and J-BUG sessions include a working lunch. Advance registration and payment of \$25 is required to attend a session.

### **Optional pre-programming events may be selected for an additional fee:**

1. Saturday night (September 7) Small group dinner outings will be available. Attendees may choose to sign up to dine at a number of restaurants around town. Each participant will be responsible for his/her own expenses. There will be kosher and non-kosher restaurant selections available.
2. Sunday (September 8) The Kutak Rock Golf tournament is golf outing which will be held at the Golf St-Raphaël, renowned course located outside of Montreal. Golf registration includes breakfast, green fees, cart rental, and transportation to and from the course. Club rentals can be reserved during your registration. A coach bus will leave the hotel at approximately 6:30am. First tee time will be approximately 8:00am. The group will return prior to the Opening Session. Golf participants will not be able to participate in the Welcome to JFNA Session.
3. Walking Tour (September 8) The tour will start with entering the most ornate Basilica in the country, walking the cobblestone and historic streets loaded with awesome architecture often used in film as a backdrop for Europe.

We'll enter an old bank lobby now converted to coworking spot for a coffee cold brew to-go made from a local microroastery. We'll hit up the waterfront and port area and point out great art galleries and authentic local shops and cafés on the non-touristy side. The guide will hand out their cheat sheet at the end which will include a list of recommendations for the best craft beer, local shops, great restaurants and cool art galleries.

All together, participants will walk away with a good understanding of the culture of the city, the foundation and history. Price includes the church entrance fees, cold brew, cheat sheet and tip for the guide.

### **Communication and Updates**

- The FTPI Annual Conference App will be available prior to the conference for Apple or Android devices. This will be the best way to know about any updates during the conference. Further information will be provided when available.
- FTPI tries to minimize paper and will not be providing printed agendas. The agenda will be available on this website and the mobile conference app.

### **Continuing Professionals Education (CPE) Credit**

- Conference participants can earn up to 28.5 CPE credits in Accounting, Audit/Tax, Personnel/HR, Computer Science and Business Management and Specialized Knowledge & Applications fields of study.
- For the first time, HR participants will be able to earn SHRM or HRCI CPE credits.
- Learning Objectives: Learning objectives are located on the course description. Please visit our website or mobile app to review course descriptions details.
- Prerequisites and Advanced Preparation: Prerequisites and/or Advance Preparation for sessions are located on the course descriptions.
- Program Level: Intermediate
- Delivery Method: Group-Live
- JFNA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit.
- Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.learningmarket.org](http://www.learningmarket.org).
- CPE sign-in sheets will be available in the session room. Please make sure to sign in either before or after the session. Representatives from Scott Circle will be collecting the sign-in sheets at the conclusion of the session.
- For HR professionals seeking HRCI CPE, the attendee will need to self report with HRCI. The SHRM CPE will be submitted by JFNA.
- Sponsors/Exhibitors and guests are not eligible for CPE credit.