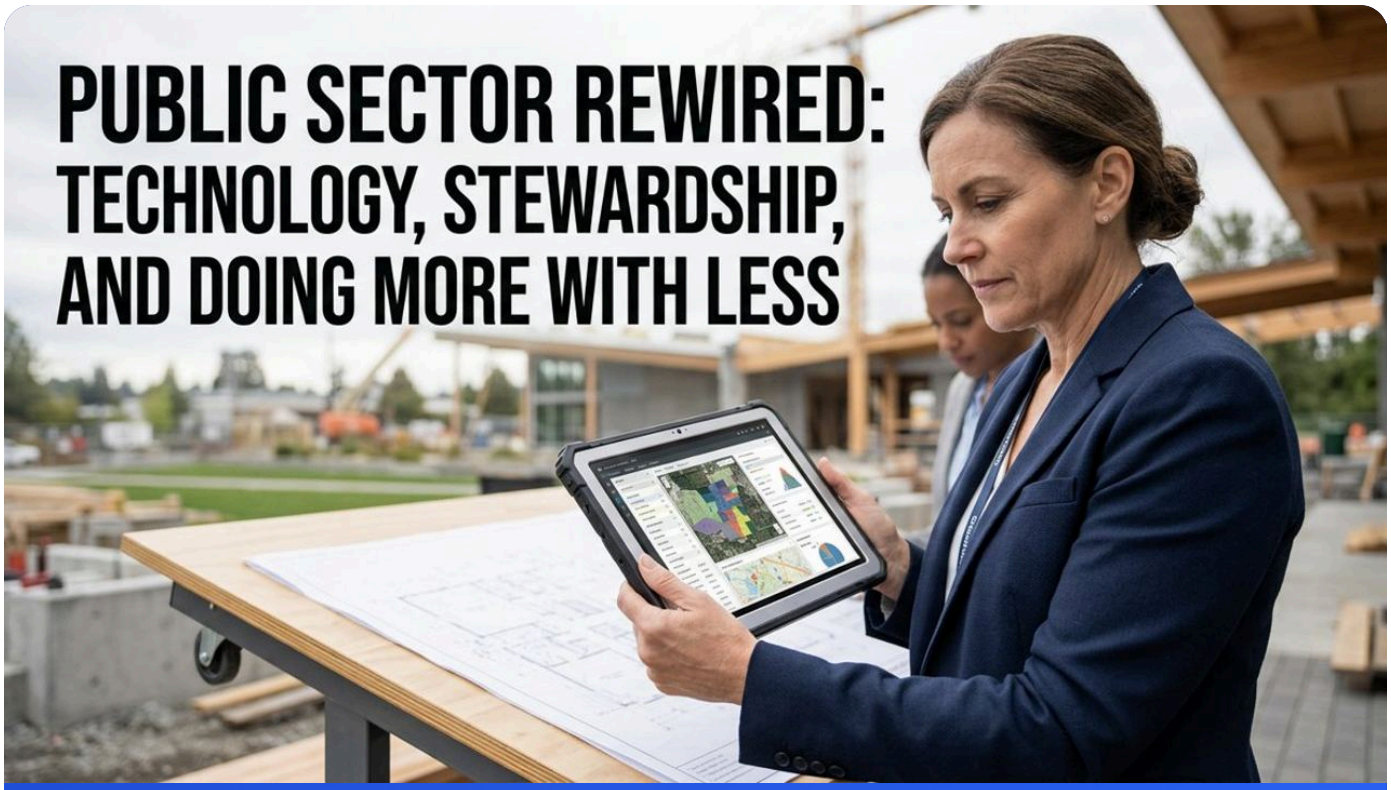


CPE Today · 2027 K2 Technology Conferences

Public Sector Rewired: Technology, Stewardship, and Doing More With Less

Government and Non-Profit

May 26, 2027	8 CPE	1 day
Live online · Central Time	Credits, proposed	Group Internet Based

About the Conference

Government and nonprofit finance teams are asked to do more with legacy ERPs, thin budgets, and staff who already wear several hats. This conference starts from that reality. The opening session shows how to see your own technology stack clearly and pick the two improvements worth making this year. The closing session looks at where AI can help with grant narratives, RFP review, and invoice extraction while staying permissible and defensible under public accountability and procurement rules.

In The Data Track, you will build refreshable Power Query models for allocations across funds and programs, grant drawdown and burn tracking, indirect costs, and SEFA preparation, and design dashboards a board member or citizen can read. You will also learn what a realistic security defense looks like on a small budget and what to do in the first hour after an incident. In The Compliance Track, you will automate the tracking of grant requirements, deadlines, and sub-recipient monitoring, connect payroll, AP, CRM, and the general ledger using native connectors and nonprofit pricing tiers, and handle records requests, retention rules, and donor and constituent data. You will earn credits in Information Technology, Computer Software and Applications, and Accounting (Governmental).

Who Should Attend

- Finance directors, controllers, and accountants in government agencies and nonprofit organizations.
- Grant managers and staff responsible for compliance, sub-recipient monitoring, and SEFA reporting.
- Finance staff who maintain legacy systems and need improvements that fit a constrained budget.
- CPAs who serve government and nonprofit clients and want 8 CPE credits in technology, software, and governmental accounting.

What You'll Take Away

- Assess your current technology stack and choose the two improvements worth funding this year.
- Build refreshable Power Query models for fund allocations, grant burn tracking, indirect costs, and SEFA preparation.
- Automate tracking of grant requirements, reporting deadlines, and sub-recipient monitoring with a clear audit trail.
- Design dashboards and transparency reports that board members, councils, and the public can read.
- Apply low-cost defenses against ransomware and payment fraud, and plan the first hour after an incident.
- Evaluate where AI tools fit in government and nonprofit finance while meeting public accountability and procurement requirements.

Proposed Agenda

Day One

8:00 AM – 9:40 AM

The Constrained Tech Stack: Legacy Systems, Thin Budgets, and Real Options

Information Technology · Intermediate · 2 CPE

What the government and nonprofit systems landscape actually looks like including legacy ERPs and unused tools. How to see your own stack clearly and pick the two things worth fixing this year.

- Identify the common components and hidden costs of a legacy technology stack in the public sector.
- Evaluate existing software tools to determine which systems are serving the mission and which are creating technical debt.
- Apply a prioritization framework to select two high-impact technology improvements that fit within a constrained budget.
- Discuss strategies for communicating technology needs to stakeholders when resources are limited.

Prerequisites: Experience working in a government or nonprofit finance or operations department. · Advance preparation: None

9:40 AM – 9:50 AM Break

9:50 AM – 11:30 AM

CHOOSE ONE OF 2 SESSIONS

Excel and Power Query for Fund and Grant Accounting

Computer Software and Applications · Intermediate · 2 CPE

Hands-on build covering allocations across funds and programs, grant drawdown and burn tracking, indirect cost calculations, and SEFA prep using refreshable queries.

- Identify the steps to connect and transform raw general ledger data using the Power Query editor.
- Apply automated transformation rules to allocate expenses across multiple funds and programs.
- Construct a refreshable grant burn-rate tracker that updates automatically when new data is imported.
- Organize disparate data sources into a standardized format suitable for SEFA reporting.

Prerequisites: Experience managing fund-based ledgers and a working knowledge of Excel formulas like VLOOKUP or SUMIFS. · Advance preparation: Participants should ensure they have the Power Query add-in enabled or are using a version of Excel (2016 or later) where it is built-in. A basic understanding of relational data concepts is helpful.

Automating Grant and Award Compliance

Accounting (Governmental) · Intermediate · 2 CPE

Tracking requirements, deadlines, and reporting across multiple funders, including sub-recipient monitoring and building audit trails.

- Identify common compliance risks in grant management that lead to audit findings or lost funding.
- Design an automated tracking workflow that triggers alerts for reporting deadlines and performance milestones.
- Implement a standardized documentation process for sub-recipient monitoring to ensure consistent oversight.
- Construct a digital audit trail that links financial transactions directly to specific grant requirements.

Prerequisites: A working knowledge of government or non-profit grant accounting principles and familiarity with standard reporting requirements. · Advance preparation: Participants should review their organization's current grant tracking spreadsheets and existing award letters to identify recurring reporting bottlenecks.

11:30 AM – 12:20 PM Lunch

12:20 PM – 1:10 PM

CHOOSE ONE OF 2 SESSIONS

Dashboards for Boards, Councils, and the Public

Computer Software and Applications · Intermediate · 1 CPE

Building reports a board member or citizen can read, transparency portals, and open data expectations without a full-time analyst.

- Identify the core financial and operational metrics that provide the most value to board members and citizens.
- Determine the appropriate level of data granularity for public-facing transparency portals.
- Select cost-effective dashboarding tools that integrate with existing public sector systems.
- Apply design principles that ensure reports are accessible and understandable for non-financial stakeholders.

Prerequisites: General familiarity with organizational performance metrics and basic spreadsheet reporting. · Advance preparation: None

Connecting the Stack Without a Budget: Integrations and Low-Cost Automation

Information Technology · Intermediate · 1 CPE

Getting the payroll system, the AP tool, the CRM, and the general ledger to talk using nonprofit pricing tiers and native connectors.

- Identify native integration capabilities within common public sector accounting and CRM software.
- Analyze the cost-benefit ratio of third-party automation tools versus manual data reconciliation.
- Evaluate the security implications of connecting cloud-based applications through API keys and webhooks.
- Determine which workflows are the best candidates for low-cost automation based on volume and complexity.

Prerequisites: A basic understanding of the organizational software stack and general accounting workflows. · Advance preparation: None

1:10 PM – 1:20 PM Break

1:20 PM – 2:10 PM CHOOSE ONE OF 2 SESSIONS

You Are a Target: Ransomware, Payment Fraud, and the Underfunded Defense

Information Technology · Intermediate · 1 CPE

Why government and nonprofit organizations top the target lists, what a realistic defense looks like on a small budget, and the first hour after an incident.

- Identify the specific organizational traits that make government and nonprofit entities high-priority targets for cybercriminals.
- Evaluate low-cost internal controls and configurations that mitigate the risk of payment fraud and unauthorized wire transfers.
- Outline a structured immediate-response plan for the first sixty minutes following the discovery of a ransomware event.
- Distinguish between high-impact security practices and expensive, low-return technology investments.

Prerequisites: A basic understanding of organizational internal controls and common digital communication tools. · Advance preparation: None

Protecting Donor, Constituent, and Employee Data

Information Technology · Intermediate · 1 CPE

Records requests, retention rules, PII handling, vendor due diligence, and the privacy expectations that come with public and philanthropic money.

- Identify common types of personally identifiable information that require protection in public sector and nonprofit environments.
- Analyze the balance between public records requests and the privacy rights of constituents and employees.
- Evaluate vendor due diligence checklists to ensure third-party partners meet organizational security standards.
- Determine appropriate data retention periods based on regulatory requirements and operational needs.

Prerequisites: A basic understanding of data storage practices and common regulatory requirements in the nonprofit or government sectors. · Advance preparation: Review current organizational data retention policies and recent vendor contracts.

2:10 PM – 2:20 PM Break

2:20 PM – 4:00 PM

AI in Government and Nonprofit Finance: Practical, Permissible, and Defensible

Information Technology · Intermediate · 2 CPE

Where AI helps with grant narratives, RFP review, and invoice extraction, balanced against public accountability, data governance, and procurement realities.

- Identify specific financial workflows where AI tools provide immediate efficiency gains without violating data privacy standards.
- Evaluate the ethical and regulatory considerations of using generative models in grant writing and public reporting.
- Develop a defensible framework for AI procurement that satisfies public sector transparency and accountability requirements.
- Determine the risks associated with data bias and algorithmic decision-making in the context of fund accounting and resource allocation.

Prerequisites: Experience working in government or nonprofit financial management. · Advance preparation: None

All times Central Time. Proposed agenda — sessions, times and credits may change before the conference. Registration details, final credits and NASBA disclosures are published on the conference page.
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