

Presenters

TROY RECTOR; SENIOR MANAGER in the Not-For Profit Services Group at Clark Nuber and has spent his career serving not-for profit and governmental organizations. He specializes in performing audits of social service, healthcare, low income housing and other organizations receiving federal assistance. Troy holds bachelor's degree in business administration with a dual concentration in accounting and finance from Indiana University. Email: TRector@clarknuber.com

JAMES (JIM) T. LINDELL, CPA is the PRESIDENT of a Wisconsin based provider of strategic & financial consulting, professional speaking, training, and executive coaching. Jim has an extensive background in senior management including positions as Chief Financial Officer, Corporate Controller and Corporate Assistant Controller. Jim has worked with a variety of industries including: manufacturing, health care, not for profit, distribution and food processing. He has been involved in more than 50 M & A projects and is the author of several books. Jim has received the "Outstanding Discussion Leader" recognition four times from the AICPA. Email: jim@thorstenconsulting.com

BRIAN STORRS; FOUNDER & PRESIDENT of Intuitive Technologies, LLC a business consulting organization in the areas of financial consolidation, budgeting, planning, forecasting, reporting and analysis. Through a consultative approach, Intuitive TEK helps organizations improve their business operations and results through more efficient use of ERP systems and process optimization. Intuitive TEK is a strategic partner with Adaptive Insights, the leading provider of cloud based budgeting and planning software and was awarded Adaptive's Top North American Partner for 4 years running: 2010, 2011, 2012, and 2013. Email: brian.storrs@intuitive-tek.com

KYLE HURST; PROFESSOR OF ECONOMICS, UC Denver. A graduate of Baylor University. His work experience includes: consulting, banking, as well as spending the last thirteen years teaching at the university level. His research interests include macroeconomics, public finance, and sports economics. Email: Kyle.Hurst@ucdenver.edu

WILL MAYHEW; SENIOR DIRECTOR IT for Lutheran Social Service of Minnesota. He is responsible for directing all technology related activity for 2,300 employees across 20+ lines of service and in central support services at LSS. Will joined LSS in 2006 as the Technical Support Services Manager, moving into his current role in 2010. In addition to his role at LSS, Will serves as Treasurer for the Lutheran Information Technology Network (LITN). Email: William.Mayhew@lssmn.org

LFMA

36th Annual Meeting & Conference

October 5-7, 2014

The Inverness Hotel & Conference Center
Englewood, CO

Our mission:

To enable and support the continuing improvement of fiscal management services in Lutheran affiliated/recognized service ministry organizations by providing a vehicle and forum where people in the industry can join together for common sharing and educational experiences.



Sunday, October 5

5 - 7:30 pm Networking Reception Golf Grille
hors d'oeuvres & cash bar
Welcome: Scott Bear, Board Chair

Monday, October 6

8 - 8:30 am Opening Announcements, Scott Bear, Board Chair Conference Room E
Devotions, Reverend Donald Hallberg, MIF

8:30 - 10 am **“OMB’s New Uniform Requirements for Grants
& Cooperative Agreements; What You Need to Know”**
Troy Rector, CPA with Clark Nuber, P.S.

The most significant changes in more than 18 years for Federal grants and cooperative agreements will become effective December 26, 2014 for new awards and amendments to existing awards. Learn about the key changes to requirements, how they may impact your organization and new opportunities that are available as a result of the new uniform requirements.

10 - 10:30 am Networking Break

It’s All About Best Practices

10:30 - Noon **“Increasing the Value of the CFO/Controller/Accounting
Department through Continuous Improvement.”**
Jim Lindell, President & CEO, Thorsten Consulting Group

- Where is value generated; and how accounting can participate in value generation.
- Continuous Improvement Techniques

noon - 1 pm Lunch Arapahoe/Inverness

1 - 2:30 pm **“Increasing Value through Continuous Improvement.”** continued
Jim Lindell, President & CEO, Thorsten Consulting Group

- Topics discussed from attendee surveys.
- Areas where you and your team provide unique value to your organization – AND – areas where you believe that you could provide additional value.
- Your takeaway

2:30 - 3 pm Networking Break

3 - 4:30 pm **“Best Practices for Budgeting, Forecasting &
Financial Reporting”**
Brian Storrs, CPA, Intuitive-TEK

Explore trends in budgeting, planning and forecasting. Learn why financial reporting is moving away from Excel and toward web based applications and the benefits of such applications.

6 - 7:30 pm Welcome Arapahoe/Inverness
Roberta Wentworth, Community Engagement Leader
Rocky Mountain Region, Thrivent Financial®

Devotions
James Barclay, President/CEO, Lutheran Family Services Rocky Mountains

Banquet
Sponsored by Thrivent Financial

Tuesday, October 7

The World We Work In

8 - 8:30 am Opening Announcements, Scott Bear, Board Chair Arapahoe/Inverness
Devotions, Pastor Ann Hultquist, Cross of Christ Lutheran

8:30 - 10 am **“The State of the Workforce”**
Kyle Hurst, Professor of Economics, UC at Denver

The Labor Force: current picture, changes that are happening and new challenges on the horizon.

10 - 10:30 am Networking Break

10:30 - 11 am **“The State of the Workforce”** continued
Round table discussion of common questions.

11 - 11:30 am Sponsorship Updates & LFMA annual business meeting.

11:30 am – 1 pm Lunch on Your Own

1 – 2:15 pm **“IT Hot Topics & Project Management”**
Will Mayhew, Sr. Director IT, CIO, LSS Minnesota

- Project Portfolio Management: Evolution of a Process
- The Cloud: Experiences & Trends
- AP Invoice Processing Improvements: Demo
- LITN Update

2:15 - 2:30 pm Networking Break

2:30 - 3 pm **“IT Hot Topics & Project Management”** continued
Will Mayhew, Sr. Director IT, CIO, LSS Minnesota

3 pm Drawings
Ben Franklin Award