Risk Management and Safety

TRAINER: Stephen Reyes, and Members of Saltmarsh, Cleaveland & Gund

Stephen is a shareholder and leader of the Information Technology Services practice of Saltmarsh, Cleaveland & Gund. He joined the firm in 1997 and has been practicing in this field since 1990. His experience includes computer networking and technology consulting.

Stephen is a Certified Information Systems Auditor, Microsoft Certified Systems Engineer and a Cisco Certified Network Associate. He also holds certifications with ISACA, Novell, Citrix and CompTIA. Stephen has assisted a number of financial institutions with IT compliance audits, security audits, as well as system selection, implementation and conversion.

EVENT DETAILS

Thursday, November 2, 2023

8:00 a.m. – Noon
(Doors open 7:30 a.m., refreshments and networking opportunities available!)

Nonprofit Center Annex
1000 College Blvd, Bldg 17,
Pensacola, FL, 32504

Reserve Your Spot NOW! LIMITED SEATING

Register Online at
https://npc.pensacolastate.edu/november-2023/

$30 per registered attendee
NPC members receive 50% off

Questions? Call 850-484-1568

This Session Will Cover:

- Discovering potential risks and how to manage and minimize them
- Outlining risk management so team members understand their roles in managing risk
- Vetting practices to have in place to ensure vendors have appropriate licensing and insurance
- Methods for protecting your organization

Saltmarsh
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CERTIFIED PUBLIC ACCOUNTANTS AND CONSULTANTS

Day sponsor:
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Training Agenda

Introduction and Welcome: PSC Nonprofit Center *(8:00 - 8:15 AM)*
Overview of the day and introduction of today's trainers and objectives, pre-quiz distributed.

Training Segment 1: *(8:15 AM - 10:00 AM)*

Stephen Reyes and His Team Cover Risks and Guidelines Associated with:

- Phishing
- Malware
- Ransomeware
- Guidelines/templates/policies organizations can use to protect sensitive data
- Recommended processes and protocols associated with technology use
- A mentality of "individual responsibility" and the defined roles for risk management that should be in place
- Mitigating financial and information risks associated with EFT, ACH, and online accounting software
- New scams/schemes that you and your team are seeing and how nonprofits can protect themselves
- Data on risks associated with online fundraising
- Protecting donor data
- Risks of online accounting and CRM software
- Policies and procedures organizations can use to protect themselves

BREAK: 10:00 AM - 10:15 AM

Training Segment 2: *(10:15 AM - 12:00 PM)*

Saltmarsh, Cleaveland & Gund Accounting Team Presents:

- Managing financial risks
- Policies, procedures, and practices suggested to minimize insolvency and protect against theft
- Internal and external risks
- Policies, procedures, and practices suggested to maintain stable cash flow
- What nonprofit finance professionals and/or board members need to know
- Managing financial risks associated with investment
- What nonprofit finance professionals and/or board members need to know about investing
- Managing financial risks associated with endowments
- What nonprofit finance professionals and/or board members need to know about endowments
- Maintaining transparency to manage fiancial risk

Wrap Up: 12:00 PM
Post-quiz distributed and reminder of available resources and discussion of 2024 Nonprofit Center Offerings.