



# GFOA Session List



Topic



Room Number



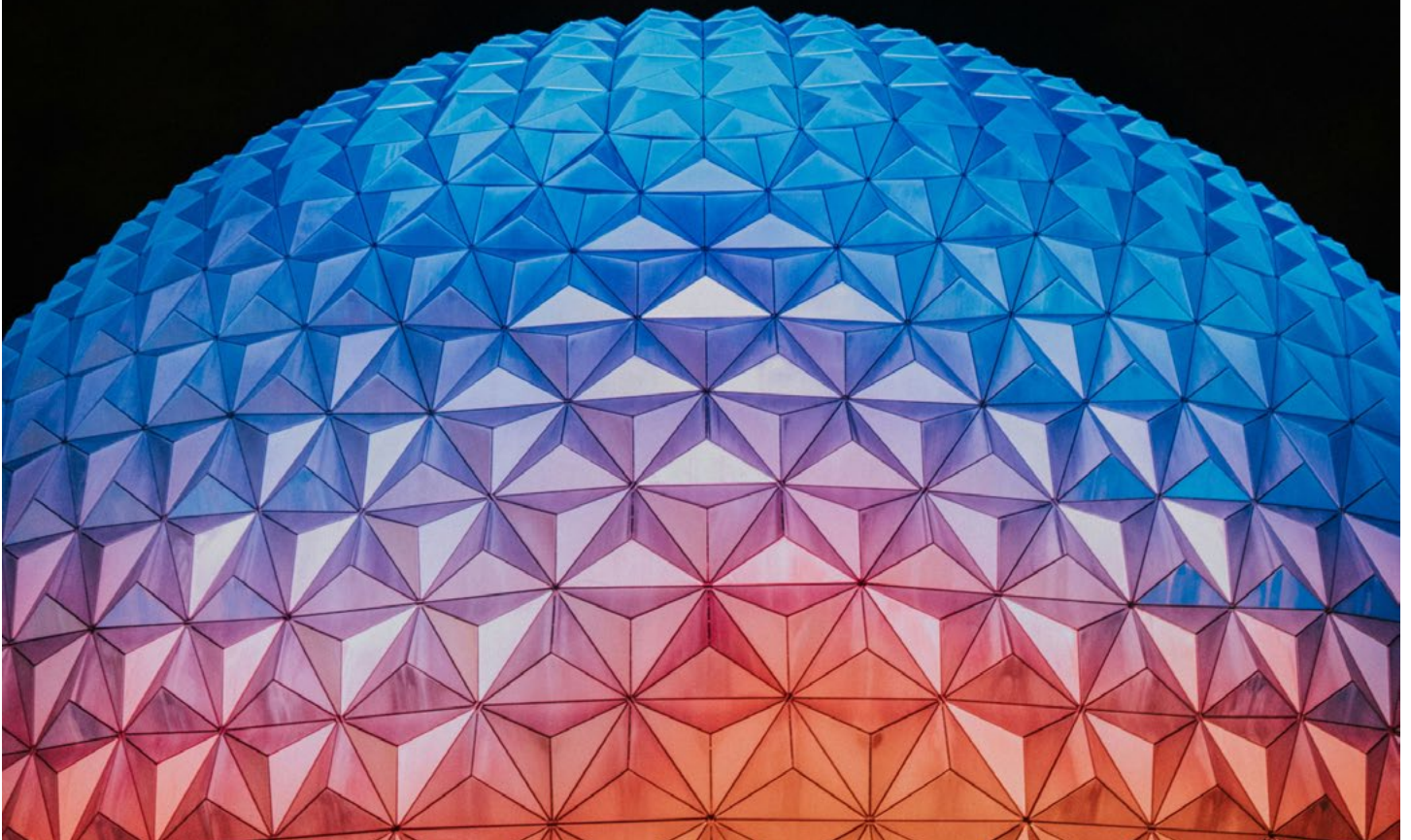
Time Slot



Speakers



Recommended Sessions



# Sunday, 6/9/2024

## Sunday Keynote: Casey Newton

Casey is the founder and editor of Platformer, an independent publication devoted to exploring the intersection of technology and democracy, including the declining trust in government. He is also co-host of Hard Fork, the critically acclaimed New York Times podcast about technology and the future. Casey's work focuses on the rise of artificial intelligence, providing commentary on the tech industry's most important developments, and what it all means for human behavior, politics, and the future that is already here.

Join us to explore artificial intelligence and other tech trends, what it means for your government, and how they will shape the future of work redefining how we interact with our colleagues, peers, and the communities we serve.

- Leadership, Ethics, and Trust
- Valencia Ballroom
- Sunday, 6/9/2024 - 1:00 - 2:20

## Leadership Workshop: GFOA's Budgeting Readiness Assessment

Local governments have long relied on last year's budget to make incremental, line-item changes around the margins to make next year's budget. Though this form of budgeting has advantages and can be useful in times of stability, it can also make local governments slow to adapt in times of rapid change, like the volatile and uncertain times we live in today. GFOA's Rethinking Budgeting initiative considers new ways of thinking, new technologies, and updated practices to better meet the changing needs of communities. GFOA has developed a tool to assess your organization's readiness to rethink budgeting. At this session, you will learn what it means to rethink budgeting, become familiar with the resources GFOA has developed to do so, and learn how to use the assessment tool in your organization.

Note: You will have to pre-register for this session. Stay tuned for details.

- Leadership, Ethics, and Trust
- W240
- Sunday, 6/9/2024 - 2:40 - 3:30

## Options for Cutting the Cost of Employee Health Benefits

For many local governments, the cost of employee health benefits takes up a bigger share of the total budget every year. Given how competitive the labor market is right now, many local governments are hesitant to cut benefits to achieve lower costs. This session will provide an overview of options for reducing the cost of employee health benefits without reducing the benefits provided to the employee.

- Leadership, Ethics, and Trust
- W230
- Sunday, 6/9/2024 - 2:40 - 3:30
- Rob Dolphin**, CPA, CFO, Utah Retirement Systems, Salt Lake City, Utah; **R. Chet Loftis**, Managing Director, PEHP Health Plan, Salt Lake City, Utah; **Lara Andrade, MBA, MHA**, Chief, Enterprise Risk Management & Shared Services, Albemarle County, Virginia

## LGBTQIA+ Caucus Networking Meeting

GFOA's LGBTQIA+ Caucus exists to advocate for its members within the profession and works to increase the visibility of LGBTQIA+ people within GFOA and the profession as a whole. At this session, the Caucus will highlight key issues, discuss the previous year's activities and the results of the remote annual business meeting, and review the plans for the coming year. We encourage all members of the community and allies to attend and make themselves heard.

- Leadership, Ethics, and Trust
- F3 (Tangerine Ballroom)
- Sunday, 6/9/2024 - 2:40 - 3:30
- Jennifer Davis**, Assistant Finance Director, City of Lawrenceville, Georgia; **Chris McCullion**, Chief Financial Officer, Orlando Utilities Commission, Orlando, Florida

## Let's Not be Petty: Getting Rid of Petty Cash

### ★ Recommended Session

All the sessions listed under Operational Improvement have the potential for learning a new, more efficient method to use in your finance operations.

The petty cash drawer will always have a special place in our hearts—the hidden keys, the clang of the change, and a quick way to break a twenty or—but it's also an antiquated practice that is susceptible to fraud and abuse - and potentially can expose your organization to procurement policy or legal compliance issues. Petty cash can be difficult to track and presents challenges to ensuring expenses are recorded appropriately. Alternatives can provide better security and tracking of expenses and sometimes even provide cash back and other rewards. This session will discuss the risks of petty cash and how to help move not only the finance office, but all other departments to alternative forms of payment for small purchases.

- Business Process Improvement, Treasury and Investment Management
- F1 (Tangerine Ballroom)
- Sunday, 6/9/2024 - 2:40 - 3:30
- Tammy Queen**, CFO/Director of Finance, City of Kansas City, Missouri

## Rethinking Financial Reporting

### ★ Recommended Session

Will have an effect on your FS reporting and perhaps systems.

GFOA knows government finance professionals face substantial opportunity costs with their time. Time spent on general purpose external financial reports is time not spent on other forms of decision support and public engagement. With this in mind, GFOA is rethinking financial reporting. This research initiative will examine whether lengthy, technical financial reports published many months in arrears are the most effective way to build trust with constituents and if producing these reports is a good use of the finance officer's time, particularly if they are not providing accountability to the public. Come to this session to learn more about the research and weigh in on the benefits of traditional financial reporting.

- Accounting and Financial Reporting
- F4 (Tangerine Ballroom)
- Sunday, 6/9/2024 - 2:40 - 3:30
- David Guo**, Regents Distinguished Professor of Public

Finance, Hugo Wall School of Public Affairs, Wichita State University, Wichita, Kansas; **Jennifer Becker**, Financial Services Director, City of Burbank, California; **Sharon Edmondson**, Director, Municipal Finance Programs, NC League of Municipalities, Raleigh, North Carolina; **Liz Farmer**, Officer, The Pew Charitable Trusts, Washington, D.C.; **Shakeel Yusuf**, Chief Financial Officer, Prince William Public Schools, Manassas, Virginia


**Sarah Larson**, Associate Professor, Miami University, Oxford, Ohio; **Dr. Craig Maher**, Professor, University of Nebraska at Omaha

## Performance-Informed Budgeting: The Prospects and Problems

The notion of basing budget decisions on performance rather than precedent or politics is a powerful one, but also a concept that can be much more easily said than done. As many governments have attempted to make this shift, they often face technical, communication, leadership, and political challenges that make sustainability of performance-informed budgeting a rare occurrence. Speakers in this session will confront the obstacles that stand in the way and identify what budget leaders can do to prepare for this transition and recommendations for achieving success, transforming the budget function, and benefiting the community.

 Budgeting and Forecasting

 F4 (Tangerine Ballroom)


 Sunday, 6/9/2024 - 3:50 - 5:05


 **Katherine Barrett**, Principal, Barrett and Green, Inc.; Jennifer Carlson, Director of Finance, City of Duluth, MN; **Chris Fabian**, Senior Director of Product Strategy - Budgeting, Tyler Technologies, Denver, Colorado; **Richard Greene**, Principal, Barrett and Greene, Inc.

## Cutting the Red Tape: Performance Based RFPs

Slow. Outdated. Costly. Complicated. Awkward. If you have used any of these terms to describe your request for proposal (RFP) process you are not alone. GFOA routinely hears from government employees and vendors about the challenges of issuing and responding to an RFP. At its core, an RFP should define a problem and request help to solve it. Attend this session to learn how to simplify the RFP process, improve your ability to write specifications, attract more competitive vendors, and reduce risk. Speakers will discuss how governments can use performance-based RFPs to focus on results and transform the relationship between operating departments, procurement staff, and the vendor community.

 Procurement

 W 224 ABEF

 Sunday, 6/9/2024 - 2:40 - 3:30

## A is for Analysis: Using the MD&A to Tell the Story Behind the Numbers


### Recommended Session

*Learn more than just copying the previous year's presentation.*

Readers often flip first to the Management Discussion and Analysis (MD&A) for a succinct overview of the financial condition and key financial highlights. However, past studies have shown that the typical MD&A is written at a level that the average citizen would not be able to understand. This session will cover tips for developing a great MD&A and provide examples. Speakers will identify ways for finance professionals to improve their analysis and ability to communicate important information to readers while also meeting financial reporting standards.

 Accounting and Financial Reporting

 F2 (Tangerine Ballroom)

 Sunday, 6/9/2024 - 2:40 - 3:30


 **Tanya M. Luther**, CPA, Senior Accountant, Central Arizona Project, Phoenix, Arizona; **Cameron Van Noy**, CPA, Financial Reporting Manager, Travis County, Texas

## No Need to Panic: Disaster Planning, Response, and Recovery

When disaster strikes, the finance professionals in a government play a critical role in response and recovery to help the community rebound from loss and damage. However, proper planning should begin months or years before tragedy strikes. Speakers will discuss how to assess risk, prepare proper response plans, and implement appropriate systems to help prepare for when disaster strikes. Speakers will also discuss how to leverage available tools and partners to manage the immediate aftermath and position the organization and community to access available funding to begin and sustain an effective recovery.

 Fiscal First Aid, Procurement, Risk Assessment


 W 224 ABEF


 Sunday, 6/9/2024 - 3:50 - 5:05


 **Jeff Bankowski**, Partner, Guidehouse, Ann Arbor, Michigan; **Rob Hogan**, Director of Integrated Grants Solutions, DRS, Atlanta, Georgia

## Engaging Academic Thinking in the Work of Government with the Public Finance Journal (PFJ)

GFOA has launched the Public Finance Journal (PFJ) to publish scholarly research in the field of public finance. Learn more about this project and hear case studies from the first issue of PFJ, published in Spring of 2024. Learn about efforts and opportunities to build deeper partnerships between practitioners and academics in government finance.

 Leadership, Ethics, and Trust


 W 224 CDGH

 Sunday, 6/9/2024 - 2:40 - 3:30



## Why I'm a Finance Officer

There is no single path to becoming a finance officer. GFOA's 23,000+ members have just as many different motivations, stories, and journeys for how they got to this point in their career. However, they all now share the responsibility for maintaining trust, supporting their community, and working to build sustainable organizations despite increasing pressure from political polarization, workforce challenges, and overall distrust of government. During this session, hear from several finance officers about their career journey, how their experience puts them in a position to deal with current challenges, and what drives their dedication to the profession.

 Leadership, Ethics, and Trust

 W 224 CDGH

🕒 Sunday, 6/9/2024 - 3:50 - 5:05

👤 **Lunda Asmani**, CPFO, Chief Financial Officer, Norwalk Public Schools; **Abbey Chapman**, Financial Analyst, City of Rock Hill, South Carolina; **Glenys R. Salas**, Finance Director, Town of Newtown, Connecticut; **Timothy Martin**, Senior Manager for Digital Experiences, Chicago Office

👤 **Sarah Brown**, Treasurer, City of St. Paul, Minnesota; **Damein P. Baity, MBA**, Chief Financial Officer, Birmingham Public Library System, Birmingham, Alabama; **Kewina Hibbert**, Bus Unit Financial Advisor, Orange County Government, Florida; **Margaret Dalley-Johns**, Finance Manager, Mobility Advancement Program Administration, Broward County, Florida; **Jason Reynolds**, Neighborhood Services Division Manager, Orange County, Florida

## The Importance of an Investment Program

Governments need a robust investment program to manage risk and provide proper structure for carrying out investment activities. The core of an investment program is an organization's investment policy, which addresses investment strategies, permissible investment products, risk profile, and reporting requirements. This session, focused on GFOA's best practice statement, will highlight ways governments can develop or enhance their investment program, including utilizing the due diligence of external parties, understanding the risks of various financial products, and analyzing their investment profile to address multiple factors, all rooted in the core principles of public investing—the safety of public funds and managing liquidity needs.

🏠 Treasury and Investment Management

📍 W230

🕒 Sunday, 6/9/2024 - 3:50 - 5:05

👤 **Jason Carini**, MBA, CTP, Treasurer, Rogers County, Oklahoma; **Darrel Thomas**, Assistant City Manager/CFO, City of Weston, Florida; **Hubert White, III CFA CTP**, Chief Investment Officer, City and County of San Francisco, Office of the Treasurer and Tax Collector, California

## Close But No Cigar: Common Errors Identified in GFOA's Award Program

Overall, GFOA members strive to meet a high standard for comprehensive and timely financial reporting - and do exceptionally well. GFOA's award programs recognize almost 5,000 different governments for their achievements. However, no one is perfect and GFOA tracks common deficiencies that are noted in the annual comprehensive financial reports submitted to the Certificate of Achievement (CoA) program. This session will highlight common areas for improvement, criteria with higher rates of nonconformance, and "asterisk" items that may prevent an organization from receiving their award.

🏠 Accounting and Financial Reporting

📍 F2 (Tangerine Ballroom)

🕒 Sunday, 6/9/2024 - 3:50 - 5:05

👤 **Jonathan Edwards**, CIA, CPFO, Internal Auditor, Volusia County, Florida; **Dr. Carl J. Gabrini**, Assistant Professor, Dalton State College, Dalton, Georgia; **Jacqueline Neubert**, Deputy Director, Georgia Department of Audits and Accounts, Atlanta, Georgia

## Black Caucus: Annual Meeting

The Annual Black Caucus Business Meeting will be used to address the business of the Caucus, including the election of new officers. An update on the activity of the Caucus will also be provided to members. Speakers and specific topics for the Black Caucus meeting will be announced at a later date.

🏠 Leadership, Ethics, and Trust

📍 F3 (Tangerine Ballroom)

🕒 Sunday, 6/9/2024 - 3:50 - 5:05

## 2024 Cybersecurity Update

### ★ Recommended Session

*A major threat. Each government should have at least one rep to attend this session.*

The pace of technology innovation seems to be outpaced only by growth of risks that the same technology can expose an organization to. As we all witnessed over the past year, the development of artificial intelligence (AI) has had a significant impact on public finance, and with that raised the threat of more sophisticated threats. Speakers will provide an overview of the latest cybersecurity threats, including the legal, internal control, and fraud challenges that come with AI's ability to emulate voices, writing styles, and more. Attend this session to understand counter measures and essential practices to mitigate current risks and better prepare for what comes next.

🏠 ERP Systems and Technology

📍 F1 (Tangerine Ballroom)

🕒 Sunday, 6/9/2024 - 3:50 - 5:05

👤 **Bryan J. Langley**, Senior Executive Advisor, Cyber Florida, City of Tampa, Florida; **Roland Miller III**, Ambassador, Cyber Florida, Tampa, Florida

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## Monday, 6/10/2024

### Monday Keynote: David Brooks

David Brooks is a bestselling author, op-ed columnist at The New York Times, and recurring commentator on PBS NewsHour. He has a gift for bringing readers and audiences alike face to face with the spirit of our times with humor, insight, and quiet passion. He is a keen observer of the American way of life and a savvy analyst of present-day politics and foreign affairs, whose columns are among the most read in the nation.

David is also the author of six books, including *The Road to Character* and *The Second Mountain*. His latest release, *How to Know a Person*, provides lessons for all to build better connections and relationships at home, at work, and in your community. Please plan on joining us in Orlando to discover what questions to ask, what conversations are important, and how you can pay attention to those around you to become more understanding and considerate. Let's move past political polarization, fragmentation, hostility, and misperception to see something in others and, in turn, see something larger in ourselves.





🏠 Leadership, Ethics, and Trust

📍 Valencia Ballroom

🕒 Monday, 6/10/2024 - 8:30 - 11:10

## Halfway Through: What Can IJJA Still Do for You?




The Infrastructure Investment and Jobs Act (IJJA) provides over a half-trillion dollars in infrastructure investment to communities due to a bipartisan effort to enhance the nation's traditional and non-traditional infrastructure network. Come to this session to hear from representatives from the U.S. Department of Transportation, the National Telecommunications Information Administration, and Environmental Protection Agency to understand the investments already made and the opportunities ahead.

-  Capital Planning and Asset Management, Federal Advocacy
-  F2 (Tangerine Ballroom)
-  Monday, 6/10/2024 - 10:30 - 12:10
-  **Joe Jarrin**, Deputy Assistant Secretary for Finance and Budget, U.S. Department of Transportation; **Raffael Stein**, Director, Water Infrastructure Division, U.S. Environmental Protection Agency, Washington, D.C.; **Johnny R. Taylor, Jr.**, Tax Division Management, Durham County Government, North Carolina

## Young Professionals Network: Speed Networking

Open to attendees under 40 years old, this interactive speed networking session is designed for GFOA members to meet and exchange ideas. Small groups will be given time to share thoughts on an issue facing their government, the public finance profession, or topics related to career progression, mentoring, or networking. Attendees can expect to meet other young professionals and begin building relationships that can be leveraged throughout the year.





GFOA will also provide information on the Young Professionals Network and programming that is offered beyond the conference.

-  Leadership, Ethics, and Trust
-  331A
-  Monday, 6/10/2024 - 10:30 - 12:10

## Small Government Forum: Investing for Small Governments

This event will give GFOA members that work for small governments the opportunity to interact with their peers, exchange experiences and ideas, and make new connections. This year's session will also provide small governments with limited fiscal and/or personnel resources best practices and tools for investing public funds. Discussion of GFOA's suite of investing best practices from practitioners will be highlighted during this session and tailored specifically for small organizations.





GFOA's Small Government Forum is free for GFOA members from small governments and exists to provide opportunities for networking and exchanging information on topics unique to the needs of managing organizations with limited staff or resources. The Small Government Forum is open to governments serving communities with less than 25,000 people or organizations with less than 500 employees.

-  Leadership, Ethics, and Trust
-  W230
-  Monday, 6/10/2024 - 10:30 - 12:10
-  **Rod Bettini**, Senior Director, Public Trust Advisors, Orlando, Florida; **Norman Eckstein**, Chief Financial Officer & Tax Collector, Township of Boonton, New Jersey; **Kevin**

**Greenville**, Finance Director, Village of Estero, Florida; **Steve Groom**, Finance Director, City of Federal Way, Washington; **Cheryl L. Lindner**, CPM, Finance Director, Town of Bow, New Hampshire; **Bradley Wilson**, CPFO, Finance Director, City of Wood Dale, Illinois

## Putting Assets to Work: Unlocking the Value of Underused Real Estate

GFOA's Putting Assets to Work (PAW) initiative has brought together 14 jurisdictions to explore best practices, policy tools, and approaches to unlock new revenue and other public benefits from unused or underutilized land. PAW leaders have identified underutilized government-owned real estate valued at billions of dollars in both small and large jurisdictions. These jurisdictions are already beginning to realize new revenue and other community benefits, including affordable housing, clean energy, infrastructure, and criminal justice innovations. At this session, you will hear from the partners leading these efforts and the governments that have engaged in and are implementing this transformative work and learn how your government could engage in this initiative.




-  Capital Planning and Asset Management
-  W 224 CDGH
-  Monday, 6/10/2024 - 10:30 - 12:10
-  **Joseph Minicozzi, AICP**, Principal, Urban3; **Dr. Darren Morton**, Comptroller, City of Mount Vernon, New York; **Paul Zalmezak**, Economic Development Manager, City of Evanston, Illinois

## Accounting and Auditing Year in Review

### Recommended Session




*Frank will go through most of these, but it is a good review.*

Each year, GFOA's Accounting and Auditing Year in Review provides conference attendees with an overview of changing standards and previews upcoming projects. During this perennial favorite, speakers will provide a comprehensive overview of the key developments in accounting, auditing, and financial reporting that affect state and local governments. Topics for this year include the new audit standards, GASB Statements 100 and 101, and upcoming implementations with related practice issues, as well as developments related to current GASB projects likely to affect preparers and auditors in the near future.

-  Accounting and Financial Reporting
-  Valencia Ballroom
-  Monday, 6/10/2024 - 10:30 - 12:10
-  **Joel Black**, Chair, Governmental Accounting Standards Board, Norwalk, Connecticut; **R. Kinney Poynter**, CPA, Executive Director, NASACT, Lexington, Kentucky; **Ken Burke**, Pinellas Clerk of the Circuit Court & Comptroller, Clearwater, Florida; **Michele Mark Levine**, Director, Technical Services, Chicago Office





## Hot Topics in the Municipal Bond Sector

In addition to managing a debt program, finance professionals need to be aware of various initiatives afoot that impact the municipal bond market and bond issuances. This session will look at key matters being discussed by federal regulators, the issuer community, and market leaders in an effort to prepare governments for what's next.

-  Debt Management
-  F1 (Tangerine Ballroom)
-  Monday, 6/10/2024 - 10:30 - 12:10





### Staffing and Stations and Trucks, Oh My! Fire Service Basics for Finance Officers

The fire service may be one of the most complicated services that local government provides. Finance staff can easily be overwhelmed by the unfamiliar jargon, unusual schedules, and specialized equipment that fire and rescue staff use to keep communities safe. At this session, you will learn the basics of the fire service, including what the job of a firefighter entails and different options for staffing and scheduling. With this new knowledge, you can assist your colleagues in the fire service more effectively.

-  Business Process Improvement
-  W 224 ABEF
-  Monday, 6/10/2024 - 10:30 - 12:10
-  **Mike Johansmeyer**, Fire Chief, Lake Mary Fire Department, Lake Mary, Florida; **Doug Matthijetz**, Deputy Fire Chief, Corpus Christi Fire Department, Texas

### On the Campaign Trail: How to Navigate the Politics of Budgeting

Budgeting is hard work, and when politics is thrown into the mix, it's even tougher. Most budget professionals are adept at the technical aspects of budgeting—developing revenue forecasts, counting positions, and estimating spending, but navigating the political landscape is something that many finance professionals try to avoid, usually unsuccessfully. This session will provide tools for navigating political traps, confronting special interests, and earning widespread support for decisions while also building on concepts of equity, fairness, and accountability. Speakers will share examples of how they successfully navigated the politics of budgeting and provide advice on how to hone your political leadership skills.




-  Budgeting and Forecasting, Leadership, Ethics, and Trust
-  F4 (Tangerine Ballroom)
-  Monday, 6/10/2024 - 10:30 - 12:10
-  **Mike Bailey**, Financial Consulting, Woodinville, Washington; **Rick Cole**, Chief Deputy Contoller, City of Los Angeles, CA; **Amelia Powers Gardner**, County Commissioner, Utah County Government, Provo, Utah; **Andrew Scott**, Deputy Chief Operating Officer, Metro, Portland, Oregon

### Building Hispanic Leadership in GFOA

In many communities, Hispanic finance professionals are underrepresented when compared to the larger population. As part of GFOA's commitment to diversity and ongoing efforts to build thriving communities, we have partnered with the Local Government Hispanic Network. Together we share important goals to encourage professional excellence among Hispanic/Latino local government administrators, to improve the management of local government, to provide unique resources to Hispanic local government executives and public managers, and to advance the goals of professional, effective and ethical local government administration.

Attend this session to discuss opportunities for Hispanic leadership development at GFOA. Speakers will profile programs

available from LGHN and GFOA and highlight careers of leading Hispanic finance officers and local government leaders to provide lessons learned and strategies that can be applied for anyone looking to better serve their community and profession.





-  Leadership, Ethics, and Trust
-  F3 (Tangerine Ballroom)
-  Monday, 6/10/2024 - 1:30 - 2:20

### Looking in the Mirror: Reflections on Different Leadership Styles

#### ★ Recommended Session




*Any of the leadership sessions might be good for a review of our personal styles and options.*

Effective and inspiring leaders are needed at all levels within an organization. You don't have to be a manager or a supervisor to be a leader. Depending on the situation, sometimes you may need to step up and fill a leadership role in your organization. At this session, learn what makes a great leader, how you can develop your leadership skills in different situations, and how to ensure your colleagues' knowledge, skills, and experiences are fully utilized to help your organization succeed.

-  Leadership, Ethics, and Trust
-  W230
-  Monday, 6/10/2024 - 1:30 - 2:20
-  **Laurie Brewer**, Assistant City Manager, City of Georgetown, Texas; **Angelique Hayes Rice**, Associate CFO, District of Columbia Government, Washington, D.C.

### Preparing School Districts for the ESSER Funding Cliff

ESSER funding is set to expire in September 2024. The underlying purpose of the funding was to address student learning losses during the pandemic. Many school districts used these funds to implement new strategies or initiatives to close the learning losses. With the expiration of ESSER funding on the horizon, school districts will need to determine which ones worked and which did not. This session will explore the basics of academic return on investment (ARO), including how to select a target program for the AROI analysis, the need for a clear definition of the intended outcome of an educational initiative, and the relative costs and benefits of different means to accomplish those outcomes.

-  Budgeting and Forecasting
-  W 224 ABEF
-  Monday, 6/10/2024 - 1:30 - 2:20

### We're All in This Together: Getting Public Support for Tough Choices

To achieve the goal of a thriving community, public finance professionals often have to get the public on board with unpopular decisions. Should we raise taxes? Cut services? Conserve natural resources? The answers to these questions can have significant impacts on the quality of life in a community, and the best path forward is rarely the easy one. This session will explore how public finance professionals can establish a common vision for the future to gain support for the tough choices their organizations often need to make.

- Leadership, Ethics, and Trust
- F4 (Tangerine Ballroom)
- Monday, 6/10/2024 - 1:30 - 2:20

**Rae Bowman**, Deputy Administrative Services Director; **Buffy Bullis**, Administrative Services Director, Monrovia, California

## Paint by Number: Steps for Producing a High Quality PAFR

### ★ Recommended Session

*Still a goal of the IGFOA—to have an easy to understand report for non-financial users.*

GFOA encourages governments to supplement their annual comprehensive financial reports (ACFR) with popular annual financial reports (PAFR) geared for audience who may not be familiar with generally accepted accounting standards, technical jargon, or the complexities of government finance. However, producing a good report that can effectively communicate with a broad audience is not an easy task and involves much more than adding colored charts, photos, and the ever popular “dollar bill image” to statistics pulled from the ACFR. In this session speakers will discuss strategies for deciding what to include, provide tips for translating and better communicating information from your ACFR, and show examples from high-quality PAFRs.

- Accounting and Financial Reporting
- F2 (Tangerine Ballroom)
- Monday, 6/10/2024 - 1:30 - 2:20
- Mark Gassaway MAcc, MBA, CPA**, Finance Director, Clark County, Washington; **Prashant Shah**, Finance Director, Westlake, Ohio

## Navigating Contractor Disputes

Whether in our professional or personal lives, we’ve all heard horror stories about contractor disputes throwing projects off their timeline and causing budget overruns. This session will explore how local governments can manage contractor disputes, from change orders to performance issues. Panelists will discuss topics including the main drivers of contract disputes, how to better understand your risks, essential contract terms for local government, and how to identify problematic situations before they occur.

- Procurement
- F1 (Tangerine Ballroom)
- Monday, 6/10/2024 - 1:30 - 2:20

**John (Jack) Pellegrino, NIGP-CPP, CPPO, CPCM**, Director of Purchasing and Contracting, County of San Diego, CA

## Using Youth Fiscal Maps to Guide Decision Makers

Even though budget information is public and readily available, it is also not presented in a way conducive to answering complex questions about spending in specific areas or on important initiatives. However, knowing the answers to these questions is imperative for making informed and aligned budgeting decisions to support better outcomes within our communities. This session will explore how fiscal maps can help and how you, as a finance professional can extract key funding details from the myriad of complex budget documents and distill that data into a format that lawmakers, advocates, and community members can use and understand. Speakers will highlight examples from the Children’s

Funding Project to show how complex budget information for government children service programs can be summarized and how to apply these lessons to other critical program areas.

- Budgeting and Forecasting
- W 224 ABEF
- Monday, 6/10/2024 - 1:30 - 2:20

**Amelia Vaughn**, Director, Fiscal Data Infrastructure, Children’s Funding Project, Bumpass, Virginia

## New PCI Compliance Standards: What Governments Need to Know

### ★ Recommended Session

*Payment card industry (PCI) compliance is mandated by credit card companies to help ensure the security of credit card transactions in the payments industry.*

Payment card industry (PCI) compliance for entities that accept payment cards is imperative for reducing the risk of fraudulent transactions and for keeping transaction costs in check. These standards are changing in 2024, and governments need to ensure their understanding and procedures are robust to address the new requirements, as well as the underlying standards. Speakers will provide an overview of the new standards and share key takeaways for governments to incorporate them into their PCI compliance program.

- Treasury and Investment Management F
- 3 (Tangerine Ballroom)
- Monday, 6/10/2024 - 1:30 - 2:20
- Tod Ferran**, Principal Consultant, Coalfire Systems, Inc., Greenwood Village, Colorado

## Leadership Workshop: Equity and Evidence-Based Budgeting

To be an effective chief financial officer (CFO), you need more than technical skills and knowledge. You also need to be able to navigate politics, communicate complex information, guide decision-making, and lead teams through times of change, uncertainty, and crisis. At this session, you will hear from a panel of chief executives about what they are looking for in a CFO and other leadership positions in government, including the different types of challenges they expect leaders to be able to manage. You will also learn how to prepare for an interviews, navigate more complex hiring processes, and demonstrate you have what it takes. This session will also allow attendees to practice interviewing skills with your peers.

Note: Download the GFOA conference app to pre-register for this session.

- Leadership, Ethics, and Trust
- W340
- Monday, 6/10/2024 - 2:40 - 4:40
- Chelsea Powell**, Associate Director, Local Practice, Results for America, Washington, D.C.


## Cash May Not be King: The Future of Contactless Payment in Government

The number of payment options available to customers has shifted dramatically in recent years, but many governments have yet to embrace new technology that makes payments easier for

customers (or for the organization itself). This session will provide an overview of contactless payment options commonly available in other industries and how governments can accept these payments securely and safely. Speakers will also provide lessons learned on how to best integrate contactless payment options with current systems and cashiering functions.

 Treasury and Investment Management, ERP Systems and Technology


 F3 (Tangerine Ballroom)

 Monday, 6/10/2024 - 2:40 - 3:55


 **Håkon Johanson**, Director of Finance/CFO, Town of Gilbert, Arizona; **Jonathan Millard**, Senior Vice President and Market Executive, Bank of America; **Rodney Shine**, Chief Deputy Treasurer, Marion County Treasurer's Office, Indiana; **Bradley Wilson**, CPFO, Finance Director, City of Wood Dale, Illinois


### The Climate Cost Collision: Addressing Climate Mitigation at the Local Level

Climate change will be felt at a local level and governments will need to better understand how they will be impacted and what they will need to do to address challenges from sea-level rise, flooding, drought, severe weather, public health, population change, or more. The session will help finance professionals identify key risks that governments face, provide tools for assessing the financial and long-term budget implications, and provide ideas for potential mitigation strategies. In addition, speakers will highlight innovative and creative solutions that governments can take advantage of now to better prepare their leaders, the organization, and overall community.

 Capital Planning and Asset Management

 F1 (Tangerine Ballroom)

 Monday, 6/10/2024 - 2:40 - 3:55

 **Peter Adams**, Associate Director, Howden Group, New York, New York; **Matthew Hochstein**, Vice President, Hagerty Consulting, Washington, D.C.; **Katie Walsh**, Head of Climate Finance for Cities, States/Regions & North America Lead, CDP, Brooklyn, New York

### Not Getting Any Easier: Ongoing Difficulty with Reporting for Pensions and OPEB

Current accounting and financial reporting standards for pensions became effective for fiscal years beginning after June 15, 2014, and similar changes for other postemployment benefits followed three years later. Even now, many governments still struggle with accounting and reporting for postemployment benefits, given the large number and high complexity of estimates necessary to measure and explain these amounts. In this session, refresh your fundamental understanding of defined benefit pension and OPEB plans from presenters with relevant actuarial, accounting, and auditing expertise.

 Accounting and Financial Reporting

 F2 (Tangerine Ballroom)


 Monday, 6/10/2024 - 2:40 - 3:55


 **James Rizzo**, Senior Consultant & Actuary, Gabriel, Roeder, Smith & Company, Fort Lauderdale, Florida; **Erica Worley**, Assistant Director, Financial Reporting, Ohio Public Employees Retirement System, Columbus, Ohio; **Tony Boras**, Partner, Crowe, LLP, Chicago, Illinois; **Ember Strange**, Chief Financial Officer, City of North Little Rock, Arkansas


### Decision Architecture: Designing the Blueprint for a Better Budget

The traditional budget process in many governments can take the form of exercise in balancing revenues and expenses. This requires making decisions in a variety of areas including what strategies to pursue, where to raise revenue, and how much revenue to allocate to each major function or program. Making these kinds of decisions is not easy. It's also often done by groups of individuals who may have different points of view. Making it more difficult, there is almost always some level of uncertainty and potentially fraught with opportunities for bias and inconsistency. In this session, speakers will discuss the skills of a decision architect and help you come up with a plan for designing a better budget decision-making environment.

 Budgeting and Forecasting

 W 224 ABEF

 Monday, 6/10/2024 - 2:40 - 3:55


 **Nancy Zielke**, Managing Director, Alvarez & Marsal Public Sector Services; **Megan Bourke**, Director, Office of Management and Budget, Loudoun County, Virginia; **Krista Morrison**, Budget Officer, City of Kansas City, Missouri

### Staying Afloat During an ERP Implementation


#### Recommended Session

*Especially for those just starting or finishing up an implementation.*

Implementing a new enterprise resource planning (ERP) system might be one of the most daunting projects a public finance officer ever undertakes. The financial stakes are high, and all parts of the organization are involved (or should be). Not only are these projects difficult, but they also put a significant strain on other operations. The pressure is enough to break even the most seasoned finance officer. This panel discussion will feature speakers who have recently led their organizations through a successful ERP implementation, were able to keep basic functions of the finance office going and maintain their sanity. Attend this session to learn what works well and what didn't in navigating an ERP implementation from the perspective of a finance officer.

 ERP Systems and Technology

 F4 (Tangerine Ballroom)

 Monday, 6/10/2024 - 2:40 - 3:55

 **Toni Brady**, Deputy County Administrator, Hernando County BOCC, Florida; **Michelle McCrimmon**, Chief Financial Officer, City of Orlando, FL; **Amy Parker**, Assistant Controller, City of Oklahoma City, Oklahoma

### Managing Your Debt Portfolio and Program

Municipal bonds provide governments with a powerful tool to raise funding to address a variety of needs for the organization and community. However, knowing your organization's limits both in terms of overall debt capacity and ability to track and support post-issuance compliance requirements is critical. GFOA recommends all governments have a debt management program that addresses policies related to when to use debt, how to navigate the issuance process and roles and responsibilities after the debt is issued. In this session, speakers will provide an overview of these responsibilities and demonstrate ways to leverage technologies and best practices to help governments develop appropriate workflows and checklists.

 Debt Management

 W230



Monday, 6/10/2024 - 2:40 - 3:55

Consultant, Withersravenel, Plainfield, New Hampshire;  
**Ashay Prabhu**, International Advisor, GFOA (CEDCP)

## Women's Public Finance Network: Fostering Connection and Belonging

The purpose of GFOA's Women's Public Finance Network (WPFN) is to foster the careers of women in public finance through education, networking, and mentoring opportunities. This session will focus on WPFN's 2024-2025 theme, which is "You are a Leader." Attendees will learn about the value of membership in WPFN, the skills needed for leading in the next decade, and professional growth opportunities. Speakers will examine leadership in relation to skills, self, communication, and collaboration.

Leadership, Ethics, and Trust

W 224 CDGH

Monday, 6/10/2024 - 2:40 - 3:55

## Sunshine on GFOA's Latest Initiatives: Collaborating with GFOA State and Provincial Associations

Join us for an engaging session as the GFOA team provides the latest updates from GFOA and new opportunities for your organization to engage and take advantage of new programs and resources. Presenters will discuss membership, the CPFO Program, and host a discussion to provide feedback on potential future ideas for collaboration. Attendees will also hear about the unique Western States partnership. If you're involved with a GFOA state and/or provincial association, don't miss this opportunity to learn more and connect with your peers!

Leadership, Ethics, and Trust

331A

Monday, 6/10/2024 - 4:15 - 5:30

**Gloria Butsch**, Finance Director, City St. Helens, Oregon; **Melissa Haley**, Finance Director, City and Borough of Sitka, Alaska; **Stacie Tellers**, MSA, CPA, LGS Manager/23-24 President, Office of the Washington State Auditor / Washington Finance Officers Association, Olympia, Washington; **Ernie Reyna**, California Society of Municipal Finance Officers, Perris, California; **Terri Velasquez, CPA, CPFO**, GFOA Past President, Finance Director, City of Aurora, CO

## Partnering with Public Works: Using Data and Levels of Service for Better Asset Management

Solutions to the challenges of aging infrastructure are not found exclusively within the finance or budget offices of an organization. While GFOA believes that a robust asset management program is important to long-term sustainability, we are far from alone with this view and are better collaborating with peers from across the organization, including public works. Managing the data and making good short- and long-term capital and asset management decisions is a shared responsibility. This session will explore how finance can best work with engineers, project managers, and others in the organization to drive cost effective maintenance, maintain services, and get the most from existing infrastructure.

Capital Planning and Asset Management

W230

Monday, 6/10/2024 - 4:15 - 5:30

**Trey Hunter**, Capital Planning and Budgeting Program Manager, San Francisco Public Utilities Commission, San Francisco, California; **Rod Lovely**, Asset Management

## Risky Business: What's the Right Amount of Reserves?

Governments are subject to financial shocks, including natural catastrophes, recessions, and more. Financial reserves are essentially a form of self-insurance that governments use to buffer themselves against these risks. But what are the risks governments should be concerned about? What size of reserves is appropriate to cover risks? What opportunities are there to use commercial insurance to help cover these risks? Speakers in this session will answer these questions and more. Attendees will leave with resources and strategies to apply risk-aware and risk-savvy thinking to reserves in their own organizations.

Business Process Improvement, Risk Assessment

F4 (Tangerine Ballroom)

Monday, 6/10/2024 - 4:15 - 5:30

**Tim Blake**, Managing Director, Moody's Ratings, New York, New York; **Jason Greene**, Chief Financial Officer, City of Miami Beach, Florida; **Kimberly Olivares**, Deputy Chief Financial Officer, City of Austin, Texas

## Public Engagement That Works

Research has found that the traditional public hearing featuring public officials seated at the front of the room and speakers who get a short amount of time at the microphone often does more harm than good when it comes to building trust and connection between government and members of the public. With this in mind, GFOA is encouraging its members to rethink their approach to public engagement. Based on GFOA's research on this topic, this session will feature speakers who will explain why the current model isn't working and highlight case studies of local governments that have achieved better outcomes from their public engagement efforts.

Budgeting and Forecasting

F1 (Tangerine Ballroom)

Monday, 6/10/2024 - 4:15 - 5:30

**Nick Vlahos**, Deputy Director, Center for Democracy Innovation, National Civic League

## Changing Tides: Changes and Error Corrections in Financial Reports

Things change and mistakes happen. When this occurs, finance professionals need to be transparent and report the change. However different kinds of changes impact a government's financial statement reporting in different ways. This session will provide an overview of the accounting and reporting requirements for governments when there are changes to or within the reporting entity, changes in accounting principles, changes in estimates, and corrections of errors. Speakers will emphasize the new display requirements and clarify the requirements for prior periods reported in the Required Supplementary Information (RSI) and Supplementary Information (SI).

Accounting and Financial Reporting

F2 (Tangerine Ballroom)





Monday, 6/10/2024 - 4:15 - 5:30

**Diane B. Allison, CPA, CGMA, CGFO**, Assistant Legislative Auditor and Director of Local Government Services,

Louisiana Legislative Auditor; **Steffanie Dorn**, Treasurer, Greenwood County, South Carolina; **Tami Robison**, Finance Director, Geary County, Kansas; **Kent Willis**, Partner, Pattillo, Brown & Hill, Waco, Texas

## All About ASOPs





GFOA recommends that public pension plans use an Actuarially Determined Contribution (ADC) to determine how much governments will contribute to the plan, and Actuarial Standards of Practice (ASOPs) can have a significant influence on valuing the underlying liabilities, determining specific contributions, and assessing key risk factors. This session will provide an explanation of recent changes in ASOPs—including the how and why behind the standards—and provide guidance on how pension plan administrators can effectively implement and maximize the value of ASOP-recommended activities.

-  Compensation and Benefits
-  F3 (Tangerine Ballroom)
-  Monday, 6/10/2024 - 4:15 - 5:30
-  **Amy Reynolds**, Director of Research, Teachers' Retirement System of the State of Illinois; **Todd Tauzer**, National Public Retirement Leader, Segal, San Francisco, California

## Utility Finance Forum: Lessons Learned in Modernizing Billing Systems

Utility billing systems (UBS) and related technologies for meter reading and asset management provide opportunities for improved efficiencies and customer service enhancements and can represent some of the most high-profile projects that a government takes on. In this session speakers will discuss the dos and don'ts of UBS procurement and implementation, provide an overview of the UBS market, highlight modern features, discuss how to best integrate UBS systems with enterprise resource planning (ERP), automated meter reading, and asset management systems and provide considerations for messaging with the public.

GFOA's Utility Finance Forum is free to GFOA members from utility organizations and other governments that operate utilities and allows members to learn more about rate setting, enterprise accounting, asset management, and utility-related regulations.

-  ERP Systems and Technology
-  W 224 CDGH
-  Monday, 6/10/2024 - 4:15 - 5:30
-  **Jennifer Larson**, Chief Financial Officer, City of Dubuque, Iowa; **Tanya M. Luther**, CPA, Senior Accountant, Central Arizona Project, Phoenix, Arizona





## Mission Impossible: Fixing the Challenges with Public Sector Hiring Practices

### Recommended Session

*Perhaps a way to show leadership for your governments HR.*

Hiring practices in the public sector are different than in other industries. However, as leading governments have proven, different doesn't need to mean slow, ineffective, and frustrating. This session will feature a panel of leaders from governments who were able to transform their hiring practices to increase efficiencies, increase applicable pools, reduce hiring times, and better attract qualified candidates for positions within finance and across the entire organization. Attend this session

to understand how you can learn from their experiences and improve your own recruiting processes.




-  Compensation and Benefits
-  W 224 ABEF
-  Monday, 6/10/2024 - 4:15 - 5:30
-  **Riley Akervik**, Finance Director, Central Valley Health District; **Anna Henthorn**, Accounting Director, City of Scottsdale, Arizona; **Barbara Whitehorn**, Director of Finance & Management Services, City of San Bernardino, California

## Tuesday, 6/11/2024

### Tuesday Keynote: Rana Foroohar





Rana Foroohar is a global business columnist and associate editor at the Financial Times and a global economic analyst at CNN. Rana is also the author of three critically acclaimed books, *Makers and Takers: How Wall Street Destroyed Main Street* and *Don't Be Evil: The Case Against Big Tech*. Her most recent book, *Homecoming: The Path to Prosperity in a Post-Global World* explores how globalized economies have led to inequality, economic insecurity, and distrust in institutions and how a new philosophy favoring place-based economics can provide opportunities for local communities to thrive.

Please join us in Orlando to better understand how government finance professionals must understand these dynamics and how they influence our work as public servants, decision makers, and leaders.

-  Leadership, Ethics, and Trust
-  Valencia Ballroom
-  Tuesday, 6/11/2024 - 8:30 - 10:00

### Welcome to 2030. Long-Term Financial Planning in Government

As governments contend with new and more complex challenges in their communities, long-term financial planning has become even more important, as it is the key to ensuring that government can continue to provide the programs and services the community needs both today and in the future. While no finance professional can predict the future, GFOA believes it is the responsibility of all to develop financial forecasts, understand local demographic and socioeconomic trends, and project major changes revenues and expenses to position the organization to be successful in the future. This session will feature panelists who have prepared long-term financial plans for their organizations and provide tips for how to get started on planning for your own organization.

-  Budgeting and Forecasting
-  W 224 ABEF
-  Tuesday, 6/11/2024 - 10:20 - 12:00
-  **Adam Chepenik**, Principal, Ernst & Young, LLP; **Josh Goodman**, Senior Officer, The Pew Charitable Trusts, Washington, D.C.

## Are We Done Yet? Recap from the Implementation of GASB 87, 94, and 96

To many in government finance, it can seem like there are always new accounting standards to implement. However, the last few years have been a whirlwind for most with implementation of new standards for leases, subscription-based information technology agreements (SBITAs) and public private partnerships (P3s). In this session speakers will leverage their experience with these recent implementations and highlight trends from GFOA's Certificate of Achievement program to help ensure governments are correctly meeting the accounting and reporting requirements.

- Accounting and Financial Reporting
- F2 (Tangerine Ballroom)
- Tuesday, 6/11/2024 - 10:20 - 12:00
- Kent Austin**, Senior Program Manager - Budget/Finance, Transportation Department, City of Dallas, Texas; **Adam Brill, CPA**, ACFR Manager, Indiana State Comptroller, Indianapolis, Indiana; **Donna Sandoval**, DFAS Director, City of Albuquerque, New Mexico; **Ted Williamson**, Partner, RubinBrown, LLP, St. Louis, Missouri

## The Role of Natural Assets in Planning for Resiliency

If we still think that cement and steel alone can save us, we are using 1950s thinking to battle 2020s issues. Recently, we dealt with floods filling subway tunnels, witnessed a hurricane reach the Maritimes, saw the largest dollar disaster in United States history (again), saw impacts from wildfire smoke cover practically the entire continent. Change is the only constant. How can finance professionals lead the charge to bring about differences in thinking about how we prepare for and protect ourselves against natural disasters. What can we be doing differently? What assets can we utilize to help protect our communities, and how can we create incentives for smarter, disaster aware planning to create more sustainable organizations and communities for the future.

- Capital Planning and Asset Management
- W224 CDGH
- Tuesday, 6/11/2024 - 10:20 - 12:00
- David Jenkins**, CEO, IPWEA; **Kyle Wedberg, Ph.D.**, Senior Manager, Research and Consulting, Chicago Office

## From Excel to AI: Low Cost Technologies with Big Impact

### ★ Recommended Session

Technology has the opportunity to drive efficiencies, improve services, and transform organizations of all types and sizes. While some technology is expensive and very difficult to implement, some can be very affordable and readily available for all GFOA members. Attend this session to learn about low-cost options that you can use to improve your own productivity or use to introduce new improvements to your organization. Speakers will highlight simple to use tools for analytics, communications, process improvement, and group collaboration, and discuss the impact of artificial intelligence on options that may be available in the future.

- ERP Systems and Technology
- F1 (Tangerine Ballroom)
- Tuesday, 6/11/2024 - 10:20 - 12:00
- Michael Gaughan**, Executive Director, Vermont Bond

Bank; **Bruce Haupt**, Chief Finance & Administrative Officer, Harris County Flood Control District, Houston, Texas; **Paul Workman, CPA**, Central Accounting Manager, Roanoke County, Virginia

## The Language of Numbers: How to Clearly Communicate

Numbers are at the core of a public finance professional's job, and a big part of the job is communicating those numbers to other people. This is challenging because numbers are abstract concepts. We teach children to count objects, like their fingers and toes, to make number more concrete, but the numbers that finance professionals need to communicate often go well beyond what can be accommodated by fingers and toes. This session will share examples of how we can take a cue from our childhood and communicate numbers more effectively by relating them to human experience.

- Leadership, Ethics, and Trust
- F4 (Tangerine Ballroom)
- Tuesday, 6/11/2024 - 10:20 - 12:00
- Debra Peck Lichtenberg, CPA**, Director of Finance, City of Livonia, Michigan; **Nate Reinhardt, CPA, MBA**, Finance Director, City of Shakopee, Minnesota; **Glenys R. Salas**, Finance Director, Town of Newtown, Connecticut; **Mike Secrest**, Digital Media Editor, City of Arlington, Texas

## Year in Washington: Federal Updates

GFOA's Federal Liaison Center keeps a watchful eye on congressional and regulatory activity in Washington, D.C. for members. In this session, speakers will highlight major actions at the federal level and what finance professionals need to be aware of now. Attendees will also hear about what to watch for in the coming year including federal funding opportunities, upcoming unfunded mandates and predictions for the 119th Congress.

- Federal Advocacy
- F3 (Tangerine Ballroom)
- Tuesday, 6/11/2024 - 10:20 - 12:00




## Out of Sight: Building a Procurement Function in Small Governments

For many small organizations, there is no official procurement department and having staff dedicated to procurement functions like coordinating requests for proposals (RFPs), managing vendor relationships, issuing purchase order (POs), managing contracts, and ensuring compliance with state, federal, or grantor purchase requirements is not realistic. However, the procurement responsibilities for small governments are not all that different than those of their larger peers. In this session, speakers will explain how to establish an effective procurement function in a small government and how to integrate purchasing and finance responsibilities while still maintaining focus on each. Speakers will also discuss strategies for using your enterprise resource planning (ERP) system more effectively and policy and process considerations for modern procurement functions.

- Procurement
- W230
- Tuesday, 6/11/2024 - 10:20 - 12:00

## Leadership Workshop: Developing Skills to Lead




Many governments have explored “budgeting for equity,” which, broadly defined, means allocating local government resources in a way that is intended to address unfair disparities between different groups of people, such as racial groups or income groups. However, many also find the practical application much more difficult and nuanced than anticipated. This workshop will help government leaders approach budgeting for equity with concepts from evidence-based budgeting to define and identify program effectiveness and create an environment that leads to a decision-making process. This session will focus on economic mobility, and attendees will explore examples and strategies for building a budget framework that leads to better and more equitable outcomes for the whole community. Budgeting and Forecasting,


-  Leadership, Ethics, and Trust
-  W340
-  Tuesday, 6/11/2024 - 2:00 - 4:00

 **Debby Cherney**, Chief Executive Officer, San Bernardino County Employees' Retirement Association, California; **Ron Holifield**, CEO, Strategic Government Resource; **Merrill King**, Senior Vice President, Executive Recruitment, Strategic Government Resources (SFR), Fort Worth, Texas; **Doug Thomas**, Executive Vice President - Recruitment & Leadership, Strategic Government Resources

## Pension and Defined Contribution Plan Update





Keeping up with the latest changes and trends related to administering pension and defined contribution (DC) plans can be overwhelming. Plan administrators need to stay abreast of updates to laws such as the Employee Retirement Income Security Act (ERISA) and the SECURE Act, as well as any potential changes to tax regulations affecting retirement plans. This session will provide an overview of what's new in this world and show you where to go for more information.

-  Compensation and Benefits
-  F3 (Tangerine Ballroom)
-  Tuesday, 6/11/2024 - 2:00 - 3:15

 **Debby Cherney**, Chief Executive Officer, San Bernardino County Employees' Retirement Association, California; **Amy McInerney**, Chief Financial Officer, SBCERA, San Bernardino, California





## To P3 or Not to P3

Some projects are perfect for public private partnerships (P3s). Others are just really complex deals that involve the private sector. What's the difference between the two? How do governments analyze, structure, and negotiate commercially complex deals. In addition, how can small governments do this when they don't have the internal staff resources or expertise? Attend this session to learn how all governments can better work with the private sector to deliver complex capital projects and mitigate risk.

-  Capital Planning and Asset Management, Economic Development
-  W 224 CDGH
-  Tuesday, 6/11/2024 - 2:00 - 3:15
-  **Tom Budescu**, Senior Vice President, Ernst & Young Infrastructure Advisors, LLC; **John Smolen**, Partner, Ballard Spahr, Baltimore, Maryland

## The Who, What, Where and When of Budgeting

Finance professionals have lots of options to consider when designing the budget process. Who should be involved? What is included in the process? When do you include critical elements like public engagement or strategic planning? Where in the organization should we assign responsibility for the entire process? There's no one right answer to these types of questions, but it's helpful to understand the pros and cons of your options as you are deciding what makes the most sense for your organization. At this session, a panel of government budget leaders will discuss the who, what, where, and when of their budget process, highlighting the challenges and opportunities that the different options present.

-  Budgeting and Forecasting
-  F4 (Tangerine Ballroom)
-  Tuesday, 6/11/2024 - 2:00 - 3:15
-  **Andrea Greer**, Budget Officer, City of Columbia, Missouri; **Kimberly Olivares**, Deputy Chief Financial Officer, City of Austin, Texas

## Update on the Financial Data Transparency Act





In 2022, legislation passed congress requiring public entities to utilize articulated data standards in financial and other information reported to stakeholders through the MSRB's Electronic Municipal Market Access (EMMA) platform. Come to this session to see where we are the process, what specific outreach is needed, and what you need to do to prepare.

-  Accounting and Financial Reporting, Federal Advocacy
-  F2 (Tangerine Ballroom)
-  Tuesday, 6/11/2024 - 2:00 - 3:15

## Let's Make Some Magic: The Basics of Business Process Improvement

### **Recommended Session**

Do you ever wish you could wave a magic wand to fix a broken process in your organization? Unfortunately, it's not quite that simple, but in this session, you will learn skills and techniques you can employ to improve all types of processes in your organization. Speakers will discuss their approach to business process improvement, give advice on managing change, and inspire you to make your own magic in your organization.

-  Business Process Improvement
-  W 224 AB EF
-  Tuesday, 6/11/2024 - 2:00 - 3:15
-  **Nicole Giordano**, Performance Management Manager, City of Coral Springs, Florida; **Ashley McGowen**, Deputy Finance Director, City of Grand Junction, Colorado; **Ileana Petrone**, Director of Budget and Sustainability, City of Coral Springs, Florida

## Debt Market Trends and Future Outlook

While some may long for the calm market days of just a couple years ago, issuers should be looking at current market conditions and trends to determine the opportunities available to them as they manage their outstanding portfolio and plan to issue new debt. Marketplace leaders will present insights and trends of interest to issuers, and issuance participants will provide an overview of different bond structures and financings that may help governments succeed in this dynamic environment.

- Debt Management
- F3 (Tangerine Ballroom)
- Tuesday, 6/11/2024 - 2:00 - 3:15

## Going With the Flow: The Importance of Cash Flow Forecasting

### ★ Recommended Session

*All the govts need it, but not sure that all have a clear methodology.*

Governments should have a solid understanding of the movement of funds in and out of the organization. Cash flow analyses estimate expected inflows and disbursements during a given period to ensure sufficient liquidity, prevent the need for short-term borrowing or tapping into an entity's reserve fund, and limit idle cash balances. This session will provide an overview of GFOA's best practices and resources including a step-by-step guide to setting up a cash flow analysis.

- Treasury and Investment Management
- W230
- Tuesday, 6/11/2024 - 2:00 - 3:15

**Brent Bryant**, Chief Financial Officer, City of Oklahoma City, Oklahoma; **Jackie Dunn**, Treasurer, City of Philadelphia, Pennsylvania; **Korrie Johnson**, Assistant Finance Director, Fridley, Minnesota; **Dennis Kauffman**, Assistant City Manager/Chief Financial Officer, City of Roseville, California

## Urban Forum: Responding to the Homelessness Crisis

Homelessness is a growing challenge facing nearly every urban area across the United States and Canada. Just as there is not one cause of this crisis, there is not one solution either. Addressing this challenge will require a multi-pronged approach and partnerships between different organizations. This session is hosted by GFOA's Urban Forum and all current forum members. Those interested in joining the forum are invited to attend to learn how some communities are addressing homelessness and how they are funding these efforts.

GFOA's Urban Forum is free for GFOA members from large urban governments and exists to provide opportunities for networking and exchanging information on topics unique to the demands of managing large and complex organizations.

- Economic Development
- W 224 CDGH
- Tuesday, 6/11/2024 - 3:35 - 4:50

**Martha Are**, CEO, Homeless Services Network of Central Florida; **Mary Hull Caballero**, CEO, ManageWise, Portland, Oregon; **Pat Harris**, Vice President - Customer Solutions, PMA Financial Network, Saint Louis Park, Minnesota; **Dawn Lang**, Deputy City Manager | CFO, City of Chandler, Arizona; **Isabelle (Lisa) Klier-Graham**, Division Manager, Orange County Mental Health and Homelessness Division, Orlando, Florida; **Michael Solomon**, Chief Financial Officer, Minnesota Housing, Saint Paul, Minnesota

## Triple Digit Heat Wave: Forecast for 102 and 103

Triple digits here we come! GASB's new guidance on risk and uncertainties disclosures requires governments to assess various vulnerabilities in the governmental environment. This session will provide details on concentrations and constraints, two key

aspects of the guidance, and explore scenarios that may lead to a disclosure. This session will also update participants on the long anticipated financial reporting model project and share what made the final cut regarding changes to governmental funds, proprietary funds, management's discussion and analysis and more!

- Accounting and Financial Reporting
- F2 (Tangerine Ballroom)
- Tuesday, 6/11/2024 - 3:35 - 4:50

**Bob Scott**, Deputy Town Manager, Town of Prosper, Texas; **Amy Shreck**, Partner, FORVIS, Omaha, Nebraska; **Alan Skelton**, Director of Research and Technical Activities, Governmental Accounting Standards Board

## Rethinking Budgeting in Action

Through its Rethinking Budgeting research initiative, GFOA has developed a new operating system for its approach to local government budgeting. At this session, speakers will discuss the underlying challenges of budgeting, the principles for addressing those challenges, and ideas for how the principles can be applied under different circumstances. You will also get a sneak preview of how GFOA plans to incorporate these findings into its budgeting guidance.

- Budgeting and Forecasting
- W 224 ABFE
- Tuesday, 6/11/2024 - 3:35 - 4:50

**Vicky Carlsen**, Finance Director, City of Sammamish, Washington; **David Goldman**, Deputy City Administrator, City of Oak Harbor, Washington; **Harpreet Hora**, Executive Director, Budget Services, Atlanta Public Schools, Atlanta, Georgia

## Making Technology Work for You: Robotic Process Automation in Public Finance

Have you heard about the radical new technology that promises to change the way that we work, interact with our peers, and improve our governments? While many technologies may have made that claim in the past, one of the most recent is robotic process automation (RPA). In its simplest form, RPA uses software "robots" to standardize and automate repeatable business processes (of which there are many in public finance). At this session, speakers will explain more about how RPA works, how governments are using it, and how you can make this new technology work for your organization.

- ERP Systems and Technology
- F4 (Tangerine Ballroom)
- Tuesday, 6/11/2024 - 3:35 - 4:50

**Jhason Abuan**, Information Technology Division Chief, Montgomery County, Maryland; **Linda C. Davidson**, Assistant City Manager, Boca Raton, Florida; **Jon Goodwin**, Business Applications Director, Microsoft, Atlanta, Georgia


## Doing Your Homework: Due Diligence for Financial Services Providers

Governments hold funds, short- and long-term, in a variety of financial institutions, including, but not limited to, depository banks and investment houses. When contracting for firms to hold public funds, governments should have a process for monitoring the financial standing of these entities, both at the start of and throughout the contract of services. GFOA's

new Best Practice, Due Diligence on Banks and Financial Services Providers, provides governments with an outline of considerations that should be addressed during this diligence process. Expert speakers will discuss these matters in an effort to help governments reduce the risk of financial losses, reputational damage, and other potential issues with their financial services providers.

 Treasury and Investment Management

 F3 (Tangerine Ballroom)

 Tuesday, 6/11/2024 - 3:35 - 4:50


 **John M. Globensky**, City Treasurer, City of Grand Rapids, Michigan; **Matt Hastedt**, City Treasurer, City of Charlotte, North Carolina; **Stefan Jaskulak**, CFO, Midpeninsula Regional Open Space District, Los Altos, CA; **Barbara Whitehorn**, Director of Finance & Management Services, City of San Bernardino, California

### What's In It For You: Leveraging the Inflation Reduction Act (IRA)

In 2023, Congress enacted federal funding aimed to revolutionize U.S. energy investments and production utilizing green and renewable methods. Billions of dollars of elective pay credits are available to governments. Come to this session to hear from the White House and U.S. Treasury on how best to utilize this unique opportunity in your community.

 Federal Advocacy

 F1 (Tangerine Ballroom)

 Tuesday, 6/11/2024 - 3:35 - 4:50


 **Kevin Bain**, Director of Strategy, City of Detroit, Michigan

### Making a Good First Impression: How to Prepare for Your Bond Ratings

Governments have a tremendous opportunity to present their entity and its achievements during the bond rating process. Rating agency presentations and ongoing communications are integral to establishing and maintaining successful relationships with these important debt issuance partners. Join this session to hear from rating agency representatives who will discuss the essential variables in their rating evaluations, including recent changes to rating criteria within some agencies. Issuers from entities of various sizes will also present their approach to the ratings and rating presentation processes.

 Debt Management

 TBA

 Tuesday, 6/11/2024 - 3:35 - 4:50


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## Wednesday, 6/12/2024


### You've Got a Friend in Me: The Benefits of Succession Planning and Mentoring

It is often said that a great leader leaves their workplace in better shape than they found it. As someone in public finance, leaders have many opportunities to not only improve their organization, but also the people around them. In this session, you will learn how to start succession planning and mentoring initiatives in your

organization and how you can not only prepare your successor to replace you, but also create a more cohesive team while you are still there. Speakers will provide practical strategies that leaders at all levels can initiate that will result in more resilient, flexible, and sustainable organizations.

 Leadership, Ethics, and Trust

 W230

 Wednesday, 6/12/2024 - 8:00 - 10:10


 **Courtney Kouzmanoff**, Finance Director, Champaign Park District, Illinois; **Jean Lane**, Business Service Manager, Grand Rapids Public Utilities, Minnesota; **Bob Lavigna**, Senior Fellow - Public Sector, UKG Ultimate Kronos Group; **Molly Talkington**, Finance Director, City of Rolling Meadows, Illinois

### Touch All the Bases: Tips for Hitting Your 2024 Single Audit Out of the Park

The federal grants environment is complex, and finance staff often can't catch their breath with what seems to be constantly evolving requirements. This session will provide an overview of federal funding trends and key updates for the 2024 single audit environment. Discussion will include the new format of the data collection form and the 2024 Compliance Supplement. Speakers will provide strategies to assist governments in addressing common single audit challenges.

 Accounting and Financial Reporting


 F2 (Tangerine Ballroom)

 Wednesday, 6/12/2024 - 8:00 - 10:10


 **Christina Coyle**, Director of Finance, City of Elmhurst, Illinois; **Amanda Ward**, Partner, Plante Moran, Southfield, Michigan


### Do You Trust Me?

People need to be able to believe what they hear about their government and its finances. They need to be confident that local leaders have the community's best interest at heart and that finance professionals are effective stewards of public funds. They also need to trust that the government can transform their hard-earned resources into something of value. At this session, you will hear real-life stories from finance professionals and how they've won (or lost) trust through their careers. Speakers will provide tips for attendees to assess their own level of trust and practical strategies for beginning to work on building trust both internally and externally.

 Leadership, Ethics, and Trust

 F4 (Tangerine Ballroom)

 Wednesday, 6/12/2024 - 8:00 - 10:10

 **Ken Burke**, Pinellas Clerk of the Circuit Court & Comptroller, Clearwater, Florida; Ramsey-Chessman, Chief of Staff & Chief Deputy Clerk, Clerk of the Circuit Court & Comptroller for Palm Beach County, Florida; **Diane Reichard**, Chief Financial Officer, City of Plant City, Florida


### Budgeting in a Post-ARPA World


Many local governments across the United States have relied on ARPA funds (and other COVID-related financial assistance) to balance their budgets in recent years. In many cases, these one-time funds were used to pay for ongoing costs, resulting in structural budget deficits. As local governments face the

expiration of ARPA funds, additional challenges have emerged, including decreasing commercial property values, rising inflation, and difficulty recruiting new employees--not to mention the threat of a recession. This panel will discuss strategies for improving fiscal sustainability and recommend steps that finance officers can take now to protect community priorities as federal relief disappears.

 Budgeting and Forecasting

 W 224 AB EF

 Wednesday, 6/12/2024 - 8:00 - 10:10


 **Andrew Walter Kleine**, Senior Director, Government & Public Sector, EY-Parthenon; **Daniel Ramos**, Executive Director of the Office of Management and Budget, Harris County, Texas


### When the Sky Actually Falls, Where do We Start?

With threats like aging infrastructure, heightened weather events, extreme climate conditions, and other external risks, many finance professionals will likely have to deal with some kind of “hundred year” event during their careers. This session will explore the aftermath of such an event--how to fund recovery and build recovery capacity, who to involve, and how to lead, and how to keep basic operations going. This session will feature conversations with public finance professionals who have led through the incidents that we all hope never to experience, but must be prepared to address. The goal is to help ensure that we are in a better position to consider what needs to happen in the event of the unthinkable happening to our government and community.

 Risk Assessment, Business Process Improvement

 F3 (Tangerine Ballroom)

 Wednesday, 6/12/2024 - 8:00 - 10:10

 **Sarah Brown**, Treasurer, City of St. Paul, Minnesota; **John Hess**, Assistant County Administrative Officer, County of Tulare, California; **Jimmy Kendrick**, Former Mayor, Town of Fulton, Texas; **Steven Robertson**, Comptroller, Town of Fulton, Texas


### A New Tool for Public Finance: Can AI Hack a Brighter Future?


#### Recommended Session

Love it or hate it, artificial intelligence (AI) is not going anywhere. It won't solve all public finance problems, but it's a new and developing technology that has potential to make our jobs a bit easier. In this session, you'll learn about the latest advancements in AI technologies and see how some local governments are utilizing AI-powered tools to work smarter, not harder. The session will also highlight concerns about legal, ethical, and security issues and how to prepare your organization for upcoming discussions and debate on effective introduction of AI.

 ERP Systems and Technology

 F1 (Tangerine Ballroom)

 Wednesday, 6/12/2024 - 8:00 - 10:10


 **Dharma Atluri**, Global CTO - EA Managed Services, IBM, Hyderabad, Indiana; **David Clark**, CEO, MyGovGuide, Tallahassee, Florida; **Dr. Angela Long**, Chief engagement Officer, Tallahassee Community College, Tallahassee, Florida; **James Taylor**, CEO, Florida Technology Council, Tallahassee, Florida

### Best Practice Overview: Debt Management Policies and Practices for All Governments

GFOA's debt issuance and management best practices are essential lessons for governments of all types and sizes. Members of GFOA's Debt Management Committee will provide an overview of this suite of documents, highlighting topics such as maintaining a debt policy, using external advisors, debt products, the issuance process, investor relations, and disclosure practices. Speakers will emphasize key take-aways from these best practices to help governments manage their own debt program.

 Debt Management

 W230


 Wednesday, 6/12/2024 - 10:30 - 12:10

### Managing Water Infrastructure and Assets in Modern America

Finance professionals from very different communities are united in challenges faced by water. Some face the threat of erosion and destruction of property from climate change induced flooding, others struggle with water quality and availability, more need to balance the needs of growing residential and industrial uses with that of agriculture. In all cases, finance professionals need to focus on maintaining critical infrastructure that allows our communities to exist. At this session, speakers will discuss what it takes to maintain, plan, and fund the assets and infrastructure necessary for water sustainably in the face of multi-level environmental, fiscal, and legacy system challenges.

 Capital Planning and Asset Management, Economic Development

 F4 (Tangerine Ballroom)

 Wednesday, 6/12/2024 - 10:30 - 12:10

 **Mia Billetdeaux**, Underwriting Team Lead, US EPA/WIFIA, Washington, D.C.; **Keith McLaughlin**, Executive Director, Colorado Water Resources and Power Development Authority; **Marta Ortiz**, Chief Financial Officer, Albuquerque Bernalillo County Water Utility Authority, New Mexico; **Nikolai Sklaroff**, Capital Finance Director, San Francisco Public Utilities Commission, California

### Show Me the Money: Options for Increasing Revenue


#### Recommended Session


*And who doesn't need more revenue?*

When a budget is out of balance, we often look first at cutting costs, but sometimes there is nothing left to cut, and as finance officers, we need to explore options for increasing revenue. In this session, speakers will outline different revenue options available to local governments, including user fees and different types of taxes, along with the risks associated with each option. Speakers will share their experiences and provide advice on how to move forward with establishing new fees and taxes or raising existing rates.

 Budgeting and Forecasting

 F3 (Tangerine Ballroom)

 Wednesday, 6/12/2024 - 10:30 - 12:10


 **Kim Buselmeier**, Financial Manager, City of Ann Arbor, Michigan; **Lawrence Davis Jr.**, Revenue Chief, City of Atlanta, Georgia


## Relax and Reflect: An Overview and Panel Discussion on Liabilities for Compensated Absences

Vacation days, sick time, holidays, parental leave, and jury duty—all governments have dealt with compensated absences. New measurement requirements will impact how much liability to report, especially when there is no cash settlement involved. This session will explore the more common types of compensated absences and the factors that may cause them to be reported as a liability under the new GASB guidance. Speakers will highlight the proper accounting, financial reporting, and note disclosures for various types of compensated absence liabilities, discuss key changes from the prior guidance, and share tips for successful implementation.

 Accounting and Financial Reporting

 F2 (Tangerine Ballroom)

 Wednesday, 6/12/2024 - 10:30 - 12:10

 **Melinda M. Gildart, CPA**, MBA, Deputy Director, Financial Management Division, Texas Department of Transportation; **Dr. Omar Gutierrez**, VP of Administrative Services, Fresno City College, California; **Mary Ellen Leonard**, Director of Fiscal Services, City of College Station, Texas; **Danny Martinez**, Managing Director, Cherry Bekaert Advisory, Dallas, Texas; **Susan Odenweller**, Director of Financial Reporting, City of Columbus, Ohio


## Beyond the Finance Office: Building a Collaborative Relationship with Parks and Rec


In many communities, the Parks and Recreation department is the primary way the public interacts with local government. Constituents and their families visit parks, join sports teams, learn to swim, and engage in other activities that greatly increase their quality of life. At the time, these programs can have some unique or complex finance, budget procurement considerations. To ensure this important work continues in our communities, finance staff and parks and rec staff must collaborate. At this

session, you'll hear from both finance and parks and recreation professionals about how they have developed more collaborative relationships and how that helps with purchasing supplies, processing payroll, budgeting for facilities, and more.

 Budgeting and Forecasting, Procurement

 W 224 ABEF

 Wednesday, 6/12/2024 - 10:30 - 12:10


 **Kyle Cratty**, Finance Director/Comptroller, City of Peoria, Illinois; **Ron Holifield**, CEO, Strategic Government Resource; Dr. Joshua T. Medeiros, Ed.D., CPRE, Superintendent of Parks, Recreation, Youth & Community Services, City of Bristol, Department of Parks, Recreation, Youth & Community Services, Bristol Connecticut; Rebecca Schnirman; Director, Parks Financial & Support Services Division; Diane Waldron, Comptroller, City of Bristol, Connecticut

## Outsourcing AP Functions

While once believed to only be an internal function of government, many governments are looking to outsource all or sections of accounts payables (AP) functions. Streamlining the payment process with the enhanced controls that are often part of bank and other payment providers' infrastructure can save staff time, mitigate risk, and even generate revenues. This session will explore options for outsourcing AP functions, explain how it works with existing financial systems, estimate how it changes staffing needs in finance, and discuss the considerations a government should make when determining whether outsourcing payables is the right decision.

 Treasury and Investment Management, Business Process Improvement

 F1 (Tangerine Ballroom)

 Wednesday, 6/12/2024 - 10:30 - 12:10

## Contact Information

 +1 808 523 1650

 [www.pitiviti.org](http://www.pitiviti.org)

 900 Fort Street Mall, Suite 1540  
Honolulu, Hawaii 96813

 Graduate School USA

