



# Budget Analyst Training Academy

August 10 – 13, 2010

Course Level: Intermediate • Prerequisite: None

**24 CPE Credits**

**Classes will be held at the GFOA offices:  
203 North LaSalle Street • Suite 2700 • Chicago, IL 60601-1210**



**GROUP-LIVE  
COURSE**

**Target Audience:** Beginning and intermediate budget analysts.

**Program Overview:** This intensive three-day program is designed to provide participants with the necessary knowledge and skills to understand, impact, and improve the public-sector budgeting process. Knowledge gained in the academy will improve participants' analytical and problem-solving abilities, and help them lead their organizations in making better use of resources.

**Learning Objectives:**

- Understand the budget environment, including how to interpret and interact with intergovernmental and political relationships
- Recognize the need to include fundamentals of long-term financial planning in the budget process
- Improve facilitation skills for managing citizen participation and strategic planning process
- Develop basic skills for performance management, including setting goals and developing appropriate measures
- Understand the budget analyst's role in improving organizational performance
- Become familiar with the link between the budget and basic accounting principles
- Understand how elements of budgeting for outcomes can be used to transform the traditional budget process
- Understand key issues for personnel budgeting
- Explore GFOA's award criteria for preparing quality budget documents
- Become familiar with tools and techniques used by governments to improve efficiency and effectiveness of the budget office
- Learn techniques for effective communication of budget and performance information
- Improve budget forecasting skills

**Seminar Topics:**

- Budget Analyst's Role
- Long-Term Financial Planning
- Budgeting for Outcomes
- Capital Planning and Budgeting
- Preparing the Budget Document
- Incorporating Best Practices in the Budget Process
- Performance Management
- Relationship Between Accounting and Budgeting
- Personnel Budgeting
- Tools and Techniques to Improve Efficiency

**Faculty:**

- John Fishbein, Senior Manager, Technical Services Center, Government Finance Officers Association, Chicago, Illinois
- Stephen Gauthier, Director, Technical Services Center, Government Finance Officers Association, Chicago, Illinois
- Shayne Kavanagh, Senior Manager, Research and Consulting Center, Government Finance Officers Association, Chicago, Illinois
- Anne Kinney, Director, Research and Consulting Center, Government Finance Officers Association, Chicago, Illinois
- Fran McAskill, Director – Financial and Strategic Planning, Polk County Government, Bartow, Florida
- John Ruggini, Assistant Budget and Fiscal Administrator, Milwaukee County, Wisconsin

**Note:** This course relies on group work to develop course topics. There will be one group case study to complete that may require some evening/early morning work. Group presentations will occur at the end of the last day.

**RECOMMENDED READING:**

- An Elected Official's Guide to Performance Measurement*
- Organization and Design of an Effective Budget Function*
- Preparing High Quality Budget Documents*

**To learn more, order online, or register for this event, visit [www.gfoa.org](http://www.gfoa.org).**



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Program Schedule

Tuesday: Attendee check-in and distribution of course materials will take place from 12 noon – 1:00 p.m. The seminar hours will be 1:00 p.m. – 5:00 p.m. (Central Time)

Wednesday and Thursday: The seminar hours will be from 9:00 a.m. – 5:00 p.m. (Central Time)

Friday: The seminar hours will be from 9:00 a.m. – 1:00 p.m. (Central Time)

Program Location

The program will be held at the GFOA offices in Chicago, Illinois, at 203 North LaSalle Street, Suite 2700.

Hotel Information

Hotel Monaco, 225 North Wabash Avenue, Chicago, IL 60601 Phone: 312-960-8500, Fax: 312-960-1883.

- Room rate: \$139. Tax 15.4%.
• Group rate is until July 6, 2010.
• Should the GFOA block fill up or if reservations are made after the valid date, reservations will be accepted on an overall hotel space availability basis and may not qualify for the GFOA discounted rate.
• The Hotel Monaco Chicago is a short walk away from the GFOA Chicago offices. The hotel is accessible via the Chicago Transit Authority (CTA) Blue Line (O'Hare International Airport) or Orange Line (Midway International Airport). Depart the CTA station at State and Lake.

Please Print or Type

Indicate if you are faxing this form. Fax accepted only with credit card payment or purchase orders. Do Not Mail the Original.

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Employer: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State/Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

E-mail: (Required) \_\_\_\_\_

Check box to indicate if you are substituting for an active member.

Active Member #: \_\_\_\_\_

Active Member Name: \_\_\_\_\_

Please photocopy this form for additional registrants.

Due to the number of registrations received, the GFOA cannot fax/e-mail confirmations. Confirmations will be sent via U.S. mail.

Cancellation Policy: Cancellations can be faxed to the GFOA at 312-977-4806 or e-mailed to training@gfoa.org.

Requests for refunds received prior to July 23, 2010, will be levied a \$50 administrative service charge. Requests for refunds received between July 23, 2010, and August 6, 2010, will be refunded 50 percent of the registration fees. No refunds will be granted after August 6, 2010.

The GFOA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE sponsors. State boards of accountancy have final authority of the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the:



National Registry of CPE Sponsors
150 Fourth Avenue North • Suite 700
Nashville, TN 37219-2417
www.nasba.org

Substitutions (government entities only): A one-for-one substitution of a non-member for an active member is allowed. If your organization has a current GFOA member on staff who is not participating in these training seminars, a nonmember may attend in his/her place at the member rate. You must provide the member number and/or name of the GFOA member on the registration form.

Inquiries: For information regarding administrative policies such as complaints and refunds, please contact the GFOA at training@gfoa.org or at 312-977-9700.

Registration Fees

Fee includes handout materials, continental breakfast, and lunch.

Note: Early, group, and/or student discounts do not apply to this training program.

(Please Check One) \$735 GFOA Member \$940 Nonmember
Registration Fee \$ \_\_\_\_\_

New Member Fee (Call 312-977-9700 for amount) \$ \_\_\_\_\_

Discount for Paid New Member (\$ -25.00 )

REGISTRATION TOTAL \$ \_\_\_\_\_

Publications Quantity

An Elected Official's Guide to Performance Measurement \$ \_\_\_\_\_
(Members \$20/Nonmembers \$30)

Organization and Design of an Effective Budget Function \$ \_\_\_\_\_
(Members \$20/Nonmembers \$25)

Preparing High Quality Budget Documents \$ \_\_\_\_\_
(Members \$45/Nonmembers \$70)

Purchasers from Illinois add 10.25%, Washington, D.C. add 6% sales tax (unless exempt) \$ \_\_\_\_\_

Add handling charge (for all billed orders) \$ 8.00

Add shipping charge, if applicable \$ \_\_\_\_\_

PUBLICATION TOTAL \$ \_\_\_\_\_

Full-time students and bookstores receive a 25 percent discount on all products, unless otherwise noted.

Shipping

Unless otherwise specified, all merchandise will be shipped via 1st-class mail at no additional charge to the purchaser. Please allow 1-2 weeks for delivery. The following alternative shipping methods are available on request and will be billed to the purchaser.

- UPS Ground 2-day UPS Next-day UPS
3-day UPS Select Other (please specify)

Payment Information (Please Check One)

Fees must be paid in U.S. dollars by check, credit card, or purchase order.

Payment by Check:

Payable to "Government Finance Officers Association"
Send to: GFOA • 3076 Eagle Way • Chicago, IL 60678-1030

Payment by Credit Card, Purchase Order, Mail, Fax: 312-977-4806, or Scan (e-mail to training@gfoa.org):

GFOA • 203 North LaSalle Street • Suite 2700 • Chicago, IL 60601-1210

American Express Diner's Club Discover Card

MasterCard VISA

Name on Card: \_\_\_\_\_

Account Number: \_\_\_\_\_

Exp. Date: \_\_\_\_ / \_\_\_\_ (Mandatory)

Signature: \_\_\_\_\_

Please Bill Me. You must include a purchase order number. Payment must be received for all registrations prior to the event date.

P.O. No: \_\_\_\_\_



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