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May 31, 2015

Greetings!

It is my pleasure to welcome you to the Government Finance Officers Association’s Annual Conference at the Pennsylvania Convention Center on May 31–June 3, 2015.

The Government Finance Officers Association (GFOA) is a professional association servicing the needs of more than 18,000 appointed and elected local, state, and provincial-level government officials and other finance practitioners. It provides publications, training programs, services, and products designed to enhance the skills and performance of those responsible for government finance policy and management.

The GFOA’s Annual Conference gathers thousands of public finance professionals each year to share ideas, develop technical and managerial skills, view new products, and network with peers from across the country and around the world. The theme of this year’s conference is *innovation and Resilience*.

On behalf of the City of Philadelphia, I wish you a successful and productive conference and commend the GFOA on continuing to provide leadership for the government finance profession.

Sincerely,

Michael A. Nutter
Mayor of Philadelphia
GREETINGS:

It is my pleasure to join with the Government Finance Officers Association (GFOA) of the United States and Canada to welcome everyone gathered here for its 109th Annual Conference in Philadelphia, Pennsylvania.

Since its establishment, the GFOA has devoted its time and effort toward providing finance practitioners at the local, state and provincial levels with quality training, materials and services so they can hone their finance policy and management skills. I applaud this organization for its service and contributions ensuring governments’ fiduciary responsibilities are well-managed. I am certain that the GFOA will continue to have a positive impact across the Commonwealth, nation and Canada for many years to come.

As Governor, and on behalf of all citizens of the Commonwealth of Pennsylvania, I am pleased to welcome everyone gathered at this conference and I offer my best wishes for continued success in the future.

TOM WOLF
Governor

Tom Wolf
Governor of Pennsylvania
Welcome to Philadelphia, where big-city excitement meets neighborhood charm.

The second-largest city on the East Coast, Philadelphia is at the center of the Northeast Corridor and within a day’s drive of 40 percent of the U.S. population. Made famous as the birthplace of “life, liberty, and the pursuit of happiness,” the city’s strength is in the culturally diverse neighborhoods that merge to create a unique and dynamic destination. Listen to the sounds of Philadelphia on the Avenue of the Arts at the new Kimmel Center for the Performing Arts. Taste the distinctiveness of world-renowned chefs’ creations at restaurants located on Rittenhouse Row or in Old City. Relive history at “America’s most historic square mile,” Independence Mall, home to the Liberty Bell, Independence Hall, and the National Constitution Center. Feel the pulse of the city through touring its neighborhoods such as South Philadelphia’s 125-year-old Italian Market or the stately historic homes on Delancey Street in Old City.

Philadelphia is also home to the world’s largest landscaped urban park, Fairmont Park. Within Fairmont’s 9,200 acres of winding creeks, green meadows, and 100 miles of rustic trails are early American mansions, historic landmarks, outdoor sculptures, and open-air theatres. Also located within Fairmont Park is America’s first zoo, the Philadelphia Zoo. More than 1,300 animals from around the world, picturesque Victorian gardens, outstanding art, and historical architecture set the scene for a rewarding visit to the zoo.

For more information about Philadelphia, go to www.discoverphl.com/gfoa.
**Registration Hours**

Attendee check-in and registration will take place on the **Bridges (located on the second level of the convention center over Arch Street)** during the following hours. All attendees and their guests must check in to pick up their conference materials.

- **Saturday, May 30** 11:00 a.m. – 5:00 p.m.
- **Sunday, May 31** 9:00 a.m. – 5:00 p.m.
- **Monday, June 1** 8:00 a.m. – 4:00 p.m.
- **Tuesday, June 2** 8:30 a.m. – 4:00 p.m.
- **Wednesday, June 3** 8:00 a.m. – 12:00 p.m.

**Name Badges**

All conference attendee and guest badges were mailed before the annual conference. If you or your guests did not receive your badge, or if you need to request additional guest badges, please pick up your badge during registration hours on the **Bridges**. Exhibitor badges will be available onsite for pick up.

**Conference attendee badges:** All conference attendees must wear their name badges to be admitted to the conference sessions, meetings, luncheons, the Exhibit Hall, and the Sunday Welcome Reception.

**Guest name badges:** There is no registration fee for guests and children. However, guests must be registered and wear their guest badges to be admitted to the Sunday Welcome Reception and the Exhibit Hall. Children under 18 must be accompanied by an adult at all times to be admitted to the Exhibit Hall.

**First-time conference attendee scholarship recipients:** Thank you for taking advantage of GFOA’s first-time conference attendee scholarship. We hope that you will find your conference experience beneficial in the days ahead as you catch up on recent changes, learn new developments, and network with your peers. At GFOA Registration on the Bridges of the convention center, there will be a dedicated line for first-time conference attendees.
to pick up conference badges and a first-time conference attendee sticker – just look for the sign posted at the registration counter.

**If you see a fellow delegate wearing a first-time conference attendee sticker, please join us in saying “Welcome!”**

**Business Center**
The FedEx Office® Print & Ship Center provides a full range of printing, packing, shipping, and other business services. The store is located on the second floor of the Pennsylvania Convention Center. The phone number is 215-925-1218. Hours during conference will be 8:00 a.m. – 5:00 p.m.

**Cellular Phones/Pagers**
As a courtesy to our speakers and to the other conference attendees, please turn your cell phone on vibrate or off during conference sessions, meetings, and luncheons.

**City Information Desk**
Stop by the DISCOVERPHL booth for restaurant reservations and city information. The desk is located on the 100 meeting room level under the escalators and will be open on Saturday through Tuesday, 11:00 a.m. – 5:00 p.m.
Continuing Professional Education (CPE) Credits

The GFOA will use a barcode scanning system for tracking CPE credits. Your badge will be printed with a barcode that is unique to you. In order to receive CPE credit, it will be your responsibility to have your badge scanned at the conclusion of each session you attend. A GFOA staff member or representative will be available to scan your badge as you exit each session. (The GFOA staff will be unable to scan any attendee who leaves a session more than 10 minutes before it concludes. As a courtesy to your fellow attendees, please have your badge visible and ready to be scanned. Only those people that need CPE credit should have their badges scanned.)

Self-serve scanning stations: Located outside each session room will be a self-serve scanning station that will allow you to efficiently scan your badge. Slide your badge under the scanner. The light will change from red to green to notify you that your badge has been read and recorded. If you scan your badge at a self-scanning station, you can bypass the staff members scanning at the exit of the session. Self-serve scanners will be reprogrammed shortly after the conclusion of each session for the next session. If you do not get your badge scanned after a session, please resolve it the same day by visiting the Message Center located on the Bridges of the convention center.

A printed record of your scanned CPE credits will be mailed to you two to three weeks after the conference. You will not receive CPE credit unless your conference registration is paid in full. Because CPE requirements vary from state to state, CPAs are advised to check with their state board of accountancy or CPA society to ensure proper procedures are followed to earn CPE credits. It is the participant’s responsibility to report the appropriate number of credits earned.
Complimentary Beverage Service

Sunday, May 31
Coffee will be available during the morning in the back of Exhibit Hall C.
Sponsor: Oracle

Monday, June 1
Coffee will be available before the opening general session near the Terrace Ballroom.
Sponsor: Wells Fargo

Tuesday, June 2
Coffee will be available before the general session near the Terrace Ballroom.
Sponsor: Oracle

Wednesday, June 3
Coffee and items promoting the 2016 Annual Conference in Toronto will be available in the morning near GFOA Registration on the Bridges of the convention center.

Evaluations
Throughout the conference, the GFOA asks attendees to provide feedback on concurrent sessions and the conference as a whole. Evaluation forms can be found on the GFOA website at www.gfoa.org/conf-eval. Evaluations can also be filled out on the computers in the Internet Café located on the Bridges of the convention center. Your feedback is important to the GFOA and will assist us with making improvements to future conferences.
**Exhibit Hall**
Exhibits will be located in Hall C (second level) of the convention center. The Exhibit Hall is designed so you can view products, ask questions, and see live demonstrations of products and services that will save your government time and money. Children under 18 must be accompanied by an adult at all times to be admitted to the Exhibit Hall.

- **Sunday, May 31**  10:00 a.m. – 5:15 p.m.
- **Monday, June 1**     11:00 a.m. – 5:00 p.m.
- **Tuesday, June 2**    10:00 a.m. – 2:30 p.m.

**Relaxation Station:** Take a break and stop by the relaxation station in **Booth #644** in the Exhibit Hall. We look forward to seeing you there!

**Sponsor:** AXA

**Passport book drawing:** Visit the GFOA Message Center located on the **Bridges** of the convention center at 2:00 p.m. on Tuesday, June 2, to find out the winning names of the GFOA Passport book drawing. Prizes include a Microsoft Surface, iPad Air, iPad Mini, and twelve portable cell phone chargers. Only one winner per prize. Prizes will be shipped to the winners one to two weeks after the conclusion of the conference. *Exhibitors and guests are not eligible.*

**Guests with Special Needs and Medical Assistance Scooters:** Attendees must contact Scootaround directly to reserve a scooter or wheelchair (888-441-7575; www.scootaround.com).

**Medical Assistance:** First aid stations will be located in the rear of **Hall C on the second level.** To report a medical emergency, call “4911” on any house phone or 215-418-4911 from a cell phone. Please be prepared to answer some basic questions about the condition of the injured.

**No Smoking Policy:** Smoking is not permitted anywhere in the convention center.
Check out all that the GFOA has to offer!

- Not yet a GFOA member? Stop by to pick up a membership application and ask GFOA staff how you can benefit from joining the association.

- GFOA technical staff will be on hand throughout conference to answer practical questions on issues related to accounting, financial reporting, and budget presentation. Information about participating in one of the GFOA’s professional recognition programs or becoming a reviewer can be obtained at the booth. (Information is also available at the GFOA’s website: www.gfoa.org.)

Please note the following events that will take place at the booth:

**Sunday, May 31 • 10:00 a.m. – 2:00 p.m.**
Krisztina M. Dommer, Senior Program Manager, GFOA Technical Services Center, will be available to answer any questions you might have related to the GFOA’s Award Program for Small Government Cash Basis Reports.

**Sunday, May 31 • 11:00 a.m. – 12:00 p.m.**
Stephen J. Gauthier, Director, GFOA Technical Services Center, will be on hand to discuss and answer questions related to the GFOA’s new publication, An Elected Official’s Guide: Internal Control.

**Sunday, May 31 • 11:00 a.m. – 1:00 p.m.**
Individuals who have obtained the designation of Certified Public Finance Officer (CPFO) will be available to answer questions on the benefits of becoming a CPFO and how they prepared for the examinations, and any other questions related to the Certified Public Finance Officers Program.

- Members of GFOA’s Research and Consulting Center will be available at the booth throughout the conference to discuss consulting opportunities, research projects, training events, GFOA best practices, and more. Stop by to learn about the various ways that GFOA can be of assistance to you and your organization.
Toronto – Host City, 2016 Annual Conference:
Tourism Toronto will be located in Booth #100, where you can learn more about the site for GFOA’s 110th annual conference, May 22-25, at the Metro Toronto Convention Centre. Toronto is a city of contrasts. Its skyline includes the CN Tower, one of the Modern Wonders of the World, and glass skyscrapers juxtaposed with historic limestone facades. Miles of waterfront, boardwalks, parks, and trails nestle together with urban delights like cafés, artisans’ exhibits, and one-of-a-kind shops. For more information on what Toronto has to offer, visit seetorontonow.com.

Stop by the Tourism Toronto booth on Sunday from 10:00 a.m. – 2:00 p.m. and Monday from 1:00 p.m. – 2:00 p.m. for a complimentary passport photo.
The photo will be mailed to you after conference.

2016 Call for Topics: The call for session topics is now open for GFOA’s 110th annual conference. Go to www.gfoa.org to access the submission form. Registration for the conference will open in late fall on GFOA’s website.

Wireless Connection
Upgraded complimentary WiFi service will be available in all GFOA meeting rooms and public hallways. Search for SSID GFOA15. No password is required.
Sponsor: MasterCard
GFOA Publications and Session Recordings

Here’s your chance to view GFOA’s publications and to learn more about GFOA’s latest e-books. **All publications purchased onsite will be eligible for a 25 percent discount.** (Use code CON15 on your order form). A limited number of publications will be available onsite to take with you. Publications not available onsite will be mailed to you free of shipping charge following the conference. Please stop by the GFOA Bookstore, which will be located at the Products and Services booth (#100) in the Exhibit Hall on Sunday through Tuesday to place your order. On Saturday and Wednesday, publications will also be on sale during GFOA Registration on the **Bridges** of the convention center. This discount will be honored through June 30, 2015, for all registered delegates. To receive a discount after the conference, an order form must be faxed, mailed, or e-mailed to the GFOA. This discount cannot be applied to online publication orders.

Don’t miss GFOA’s latest publication: **An Elected Official’s Guide: Internal Control**

Available in E-BOOK and PRINT form

*What is internal control?* There are many different types of governments, but all of them share certain basic objectives: effectiveness, efficiency, safeguarding of assets, reliable reporting, and compliance. Internal control provides reasonable assurance that a government is, in fact, meeting all of those objectives. **An Elected Official’s Guide: Internal Control** is specifically designed to offer non-specialists — be they members of the governing board, staff members without accounting or auditing expertise,
or ordinary citizens — the information they need to understand what internal control is, how it operates, and who is responsible.

The text of this publication, written in an easily understandable question-and-answer format, reflects the most recent authoritative guidance on internal control set forth in the Committee of Sponsoring Organizations’ (COSO) revised and expanded version of its classic *Internal Control – Integrated Framework* (COSO Report), released in 2013.

For information on quantity discounts, e-mail publications@gfoa.org.

**Internet Café**

ICMA-RC has sponsored computers for attendees to use throughout the conference. These computer stations will be located on the Bridges of the convention center, and will allow attendees to do the following:

- Check e-mail and have access to the GFOA website to fill out session evaluations.
- Access a list of preregistered colleagues in attendance.
- Print airline boarding passes.

**Luncheons**

Luncheons will be open to all registered delegates, but not to exhibitors and guests. A name badge is necessary for admittance to both luncheons.

**Monday, June 1, Delegate Luncheon**
12:10 p.m. – 1:10 p.m., Hall D
*Network with fellow attendees.*

**Tuesday, June 2, Annual Business Meeting and Luncheon**
12:15 p.m. – 1:40 p.m., Terrace Ballroom
*Lunch will be served immediately following the Business Meeting.*
Incoming messages for conference attendees will be posted on screens in the Message Center, which is located on the Bridges of the convention center during conference registration hours. Messages may be left for attendees by calling 215-418-2077.

**Conference apparel:** Stop by the GFOA Message Center to purchase a variety of GFOA Wear.

**Lost and Found:** If you have lost or found an item, please check in with the Message Center.

**Program Updates:** Notices of last-minute program changes, exhibitor information, important news from the GFOA Executive Board, information on local activities, and pertinent conference news will be posted on the screens located in the Message Center.

**GFOA Now**
Find out what is happening “NOW!” Go to [www.gfoa.org/now](http://www.gfoa.org/now) for current updates, popular sessions, answers to frequently asked questions, and important information for the day’s events during the conference.

**Social Media:** Stay up-to-date with the latest conference developments by following GFOA of the US & Canada on Facebook, @GFOA on Twitter, and GFOA on LinkedIn.

**Plan your conference schedule:** Go to [www.gfoa.org](http://www.gfoa.org) for session outlines, handouts, and slides. Download calendar appointments directly from the website to set your own personal GFOA session lineup.

**Tour Desk**
Tours will be offered on Saturday through Tuesday. For more information on the offerings and to purchase tickets onsite, go to the Tours Desk in the Bridges of the convention center. Space is limited.
GFOA Shuttle Service

All GFOA conference hotels are within a 15 minute walk of the convention center. The GFOA will provide courtesy round-trip shuttle service between the hotels and conference events as noted below.

Saturday, May 30, 2015
8:00 a.m. – 5:30 p.m.  Service every 30 minutes

Sunday, May 31, 2015
9:00 a.m. – 6:00 p.m.  Service every 30 minutes

Opening Reception at The Franklin Institute
5:45 p.m. – 8:30 p.m.  Service every 20 minutes

Monday, June 1, 2015
7:00 a.m. – 6:00 p.m.  Service every 30 minutes

Tuesday, June 2, 2015
7:00 a.m. – 6:00 p.m.  Service every 30 minutes

Tuesday Night Finale – Pennsylvania Convention Center
6:30 p.m. – 10:30 p.m.
Evening shuttle service from hotels on the daily route

Wednesday, June 3, 2015
7:00 a.m. – 1:00 p.m.  Service every 30 minutes

**ROUTES:** Routes #1 – #3 will operate during the conference each day, the opening reception, and the Tuesday Night Finale.

**1. Embassy Suites, Hotel Windsor, and Sheraton City Center**
- Embassy Suites – Depart Main Entrance on 18th Street
- Hotel Windsor – Guests walk to Embassy Suites
- Sheraton City Center – Depart 17th Street Entrance

**2. Sofitel, Palomar, Sonesta, Radisson Blu, DoubleTree, and Holiday Inn Express**
- Sofitel – Depart Main Entrance
- Palomar – Guests walk across the street from Main Entrance
- Sonesta – Guests walk to the Sofitel
- Radisson Blu – Depart Main Entrance on 17th Street
- DoubleTree – Depart Main Entrance on Broad Street
- Holiday Inn Express – Guests walk to the DoubleTree

**3. Wyndham and Monaco**
- Wyndham – Depart Main Entrance on 4th Street
- Monaco – Guests walk to the Wyndham

The following route will be added on Sunday evening for the opening reception at The Franklin Institute:

**4. Marriott, Courtyard, Four Points, Loews, Hampton, Le Meridian, Home2Suites, Hilton Garden, and Sleep Inn**
- All guests walk to Pennsylvania Convention Center for departure

For ADA needs call 800-523-4046.
Presenter Ready Room
A presenter ready room will be available to all conference presenters in room **111-B** of the convention center. Coffee and water will be available in the presenter ready room at these times:

- Sunday, May 31 - 12:45 p.m.
- Monday, June 1 - 7:45 a.m.
- Tuesday, June 2 - 7:45 a.m.
- Wednesday, June 3 - 7:45 a.m.

Social Events

**Welcome Reception**
**Sunday, May 31 | 6:00 p.m. – 8:00 p.m.**
**The Franklin Institute**
GFOA’s Welcome Reception is complimentary and registered attendees and guests are encouraged to attend. Enjoy appetizers and beverages. Shuttle service will be available. For detailed information, see pages 28-29.

**Closing Event**
**Tuesday, June 2 | 7:00 p.m. – 10:30 p.m.**
**Pennsylvania Convention Center**
Enjoy a buffet dinner in **Hall D** of the Pennsylvania Convention Center before heading over to the **Terrace Ballroom** for the evening’s entertainment. Tickets will be available at **GFOA Registration** ($50 adult, $25 child). For detailed information, see pages 52-53.

Thank You
The Government Finance Officers Association expresses sincere appreciation to the following people and organizations for their assistance in planning the 109th Annual Conference:

- City of Philadelphia
- Philadelphia Convention and Visitors Bureau
All preconference seminars will be held at the Pennsylvania Convention Center. Please pick up your materials outside Rooms 113-114. Registration for a preconference seminar will begin one hour before the seminar.

Friday, May 29, 2015
1:00 p.m. – 5:00 p.m.
**Best Practice Trends in Public-Sector Procurement**
Room 113-C

New technology, process improvement, and focus on outcomes have enabled many organizations to evolve their procurement function. This seminar will cover new best practices in purchasing based on the Principles and Practices of Public Sector Procurement (http://principlesandpractices.org/) resources developed by the National Institute of Governmental Purchasing. Speakers will discuss how to integrate the best practices into high-performing finance organizations to create policies and processes around lease-purchase decision making, the evaluation process, performance-based contracting, cooperative contracts, outsourcing, and more.

**Speakers:** Rick Grimm, CPPO, CPPB, Chief Executive Officer, National Institute of Governmental Purchasing (NIGP), Herndon, VA; Tina M. Borger, CPPO, Executive Director, Finance & Administration, National Institute of Governmental Purchasing (NIGP), Herndon, VA; Paul J. Brennan, CPPO, Director of Purchasing, Rockland County, Pomona, NY; Jonathan White, Director of Business Development, Spikes Cavell, Herndon, VA

1:00 p.m. – 5:00 p.m.
**Strategic Planning**
Room 114

The strategic planning process is important to identifying priorities, setting overall goals, defining key actions, and communicating to stakeholders. Once created, the strategic plan then becomes the foundation for many other activities, such as budgeting and financial planning. It is important, therefore, that the strategic plan be realistic, relevant, and connected to or aligned with other planning processes. When done correctly, strategic planning can be an invaluable tool for the finance officer. This seminar will cover how to develop and facilitate an effective strategic planning process that can be used to
guide decision making. Attendees will learn practical techniques, including how to involve the correct stakeholders, properly evaluate opportunities and risks, develop goals, and track results.

**Speakers:** Joe Casey, Deputy County Manager, Henrico County, VA, Henrico, VA; Brent Stockwell, Strategic Initiatives Director, City of Scottsdale, Scottsdale, AZ

**Saturday, May 30, 2015**

8:30 a.m. – 12:30 p.m.

**Evolution of Financial Transparency**

Room 114  
4 CPE Finance

To be effective, financial transparency needs to reach a wide audience and provide useful information to the public about the ways resources are used and decisions are made. This kind of information typically requires a government to go beyond posting its CAFR or budget document online and include creative use of online tools, strategic communications, and other innovative public outreach methods. A more informed public can help provide government with many benefits—from greater public participation and engagement, to improved trust, to enabling collaboration to help solve challenges. Attend this seminar to hear case studies, lessons learned, tips, and effective strategies from leading practitioners who have developed innovative methods of taking an often complex subject matter to a wide audience. Topics discussed will include how to understand your audience, how to reach different segments of the population, how much it costs to be transparent, how to get started, and if it is possible to be too transparent.

**Speakers:** Darrell Hill, Chief Operating Officer, City of Hartford, Hartford, CT; Josie La Vita, Executive Director, Financial Planning Division, City of Toronto, Toronto, ON; Eric Cannon, Chief Financial Officer, Town of Addison, Addison, TX
Preconference Seminars

1:00 p.m. – 5:00 p.m.

**Infrastructure Finance**

*Room 114*  
*4 CPE Finance*

State and local governments need large investments in infrastructure to maintain and replace aging (and in many cases outdated) roads, bridges, tunnels, utility lines, and ports, and to build new assets to meet future demands. This seminar will provide guidance on how to prepare for and manage an effective capital financing function focused on infrastructure. Topics covered will include capital planning, determining return on investment for capital expenditures, capital finance strategies, the current capital finance environment, how to leverage public-private partnerships, and use of alternative funding strategies.

**Speakers:** Steven Steckler, Chairman, IMG Rebel; Bethesda, MD;  
Jeff Tyne, Deputy City Manager, City of Peoria, Peoria, AZ;  
George Spakouris, Managing Director, KPMG LLP, New York, NY

1:00 p.m. – 5:00 p.m.

**Security in an IT Environment**

*Room 113-C*  
*4 CPE Management Advisory*

As IT applications increasingly utilize “the cloud” and organizations rely more heavily on the web to deliver services, finance officers must be aware of the associated security concerns. This seminar is designed to help governments differentiate myth from reality when making decisions and managing the business side of IT security related to finance. Speakers will discuss how to develop security policies, develop an overall IT risk management framework, implement procedures to address common vulnerabilities, and monitor or audit the effectiveness of the security strategy.

**Speakers:** Richard Carberry, Senior Consultant, Sollievo Group; Middletown, PA; Angie Singer Keating, CEO, Reclamere, Inc., Tyrone, PA
Saturday Program

Conference Registration
11:00 a.m. – 5:00 p.m.

Standing Committee Meetings

Committee on Accounting, Auditing, and Financial Reporting
9:00 a.m. – 2:30 p.m., Room 115-B

Committee on Canadian Issues
9:00 a.m. – 3:00 p.m., Room 116

Committee on Economic Development and Capital Planning
9:00 a.m. – 5:00 p.m., Room 117

Committee on Governmental Budgeting and Fiscal Policy
9:00 a.m. – 4:30 p.m., Room 118-C

Committee on Governmental Debt Management
9:00 a.m. – 5:00 p.m., Room 115-C

Committee on Retirement and Benefits Administration
9:00 a.m. – 5:00 p.m., Room 118-A

Committee on Treasury and Investment Management
9:00 a.m. – 5:00 p.m., Room 118-B

State/Provincial Representatives and Presidents Meeting
3:00 p.m. – 4:00 p.m., Room 108-B
Sunday At-A-Glance

Conference Registration
9:00 a.m. – 5:00 p.m.

GFOA Products and Services Booth
10:00 a.m. – 5:15 p.m.

Exhibit Hall
10:00 a.m. – 5:15 p.m.

Women’s Public Finance Network Business Meeting and Luncheon
12:15 p.m. – 1:25 p.m., Room 108
Business meeting is open to all conference delegates. Luncheon is only open to attendees who submitted an RSVP before the start of the annual conference. The luncheon presenter will be Paula K. Fryland, Regional President, Philadelphia and Southern New Jersey, PNC Bank. Sponsor: Segal Consulting

Concurrent Sessions
1:30 p.m. – 2:20 p.m.

Concurrent Sessions
2:40 p.m. – 3:30 p.m.

Concurrent Sessions
3:50 p.m. – 4:40 p.m.

Black Caucus Business Meeting and Presentation
3:50 p.m. – 4:50 p.m., Room 117, 1 CPE Credit, Management Advisory. Open to all conference delegates. Presenter: David Unkovic, the former receiver of the City of Harrisburg, Pennsylvania, which filed for bankruptcy in 2011 citing debts over $400 million.

Welcome Reception
6:00 p.m. – 8:00 p.m. • The Franklin Institute
Continual shuttle service will be provided between all GFOA conference hotels and The Franklin Institute beginning at 5:45 p.m. See page 15 for route details.
Concurrent Sessions
1:30 p.m. – 2:20 p.m.

A New Lease on Life: Forthcoming Changes in Accounting and Financial Reporting for Leases
Room 113 1 CPE Accounting - Governmental
Recently, both the Financial Accounting Standards Board (FASB) and the International Accounting Standards Board (IASB) have been re-examining accounting and financial reporting for leases. In light of that fact, the Governmental Accounting Standards Board (GASB) has undertaken its own re-examination of the topic. This session will review the GASB’s tentative decisions to date, with special emphasis on what may change and what is likely to stay the same.

Moderator: Terry Stone, Assistant Superintendent of Finance & Administration, Henrico County Public Schools, Henrico, VA
Speakers: Melanie Seale, Assistant Finance Director, City of San Antonio, San Antonio, TX; Dave Vaudt, GASB Chair, GASB, Norwalk, CT; David R. Bean, Director of Research and Technical Activities, GASB, Norwalk, CT

Sunday, 1:30 p.m. – 2:20 p.m.
Checking Up on Your Government’s Health
Room 120 1 CPE Management Advisory
The first step in financial recovery is to identify your areas of strengths and weaknesses. This session will focus on tools and techniques for assessing your government’s financial health and highlight resources that are available to assist local governments. Speakers will provide examples of the tools and techniques that were utilized to assist them in their financial assessments and how they used self-assessment as a strategy for overall improved financial health in their organizations.

Moderator: Lauri Van Pelt, Director, Department of Management and Budget, Oakland County, Waterford, MI
Speakers: Betty Meyer, PhD, Policy Team Leader / Acting Budget Director, City of Norfolk, Norfolk, VA; Michael Coleman, Fiscal Policy Advisor, League of California Cities / California Society of Municipal Finance Officers, Davis, CA

Sunday, 1:30 p.m. – 2:20 p.m.
Smart Planning in an Upturn
Room 114 1 CPE Management Advisory
With revenues coming back, many governments face the pressure and temptation to simply restore past patterns of...
spending rather than figuring out how to use this money to create the best value for citizens. This session will focus on how to create a better decision-making process for using this restoration of funding, with a focus on establishing structures that promote long-term sustainability.

**Moderator:** Michael Nadol, Director, PFM, Philadelphia, PA  
**Speakers:** Drew Corbet, Finance Director, City of Menlo Park, Menlo Park, CA; Andrew Scott, Budget Director, City of Portland, Portland, OR

**Sunday, 1:30 p.m. – 2:20 p.m.**  
**The Bond Market: A Legislative/Regulatory Update**  
**Room 121**  
1 CPE Finance

This session will highlight the evolving federal legislative and regulatory landscape and its effect on governments’ ability to issue debt. Panelists will discuss proposals to limit the tax-exemption on municipal bond interest, SEC enforcement activity, and proposed IRS regulations on arbitrage and issue price.

**Moderator/Speaker:** Dustin McDonald, Director, Federal Liaison Center, GFOA, Washington, DC  
**Speaker:** Mitch Rapaport, Partner, Nixon Peabody, Washington, DC

**Concurrent Sessions**  
**Sunday, 2:40 p.m. – 3:30 p.m.**

**Aligning Systems with Best Practices – Programs, Service Levels, and Outcomes**  
**Room 113**  
1 CPE Management Advisory

Program budgeting is an underlying assumption of many of GFOA’s budgeting best practices, and being able to connect costs and outcomes associated with specific services is critical to communicating value to citizens. However, very few governments actually do this fundamental piece well for a number of reasons, including poor definition of programs and technical challenges in accounting for programs. This session will focus on developing a program budgeting structure and how to deal with changes that might be necessary to the chart of accounts. Speakers will present lessons learned from their experiences in transitioning to a programmatic structure.

**Moderator:** Angela Joyner, Deputy Budget Director, Council of District of Columbia, Washington, DC  
**Speakers:** Jon Johnson, Co-Founder, Center for Priority Based Budgeting, Lakewood, CO; Dr. Jesus Amezcuea, Assistant
Superintendent for Business, Harris County Department of Education, Houston, TX

Sunday, 2:40 p.m. – 3:30 p.m.
**Making Your Government FEMA Friendly**

The Federal Emergency Management Agency (FEMA) offers critical resources to governments recovering from disasters. However, compliance with FEMA requirements poses numerous practical challenges. This session will explore accounting strategies and technology applications that can help governments meet these challenges.

**Moderator:** Kathleen Askelson, Chief Financial Officer, Jeffco Public Schools, Golden, CO

**Speakers:** John Grathwol, Deputy Director, City of New York, New York, NY; Mathew Werner, Infrastructure Program Manager, Emergency Manager, Office of Emergency Management, City of Philadelphia, Philadelphia, PA

While financial reporting in conformity with generally accepted accounting principles remains the ideal, it often is not a viable option for very small governments. This session will offer information on a GFOA professional recognition program that assists small governments that prepare cash basis reports to enhance the quality of their financial reporting and provides recognition to governments that are successful in doing so.

**Moderator:** Jennifer C. Johns, Assistant Finance Director, City of Miamisburg, Miamisburg, OH

**Speakers:** Robert Scott, Assistant City Manager/CFO, City of Carrollton, Carrollton, TX; Stephen W. Blann, Director of Governmental Audit Quality, Rehmann, Grand Rapids, MI

Communities and elected officials are calling for their governments to scrutinize investments to ensure they do not have a negative social, environmental, or political effect. Additionally, many governments have been...
charged with finding investments that specifically have a positive social, environmental, or political impact. Whether your government is challenged with finding new types of investments or having to divest certain segments of its current portfolio, this session will share information about the socially responsible investment movement, including what various governments are doing in this arena and how best to manage these processes.

**Moderator:** Gary Ometer, CPA, CGMA, Chief Financial Officer, Virginia College Savings Plan, North Chesterfield, VA

**Speaker:** Jennifer Cooperman, Treasurer, City of Portland, Portland, OR

Sunday, 2:40 p.m. – 3:30 p.m.

**Strategies for Successful Voter Approved Infrastructure Funding**

Room 120  
1 CPE Finance

As scrutiny for public finance projects increases, municipalities must continue to find creative ways to address a growing list of capital needs. Bond referendums allow municipalities to effectively package similar projects in a transparent manner for voter approval. Attendees will hear about recent bond measures that were approved and voted down by voters for development, and advocacy strategies as well as lessons learned. Speakers will focus on the appropriate role of finance officers during a bond referendum.

**Moderator:** Jennifer Brown, Director of Finance, City of Sugar Land, Sugar Land, TX

**Speakers:** Tess Lengyel, Deputy Director for Planning & Policy, Alameda County Transportation Commission, Oakland, CA; Joe LaHait, Debt Coordinator, Fairfax County, Fairfax, VA; Patricia Reavey, Director of Finance and Administration, Alameda County Transportation Commission, Oakland, CA

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**Concurrent Sessions**

Sunday, 3:50 p.m. – 4:40 p.m.

**Are Investment Pools Right for You?**

Room 121  
1 CPE Finance

Many governments utilize investment pools, including local government investment pools (LGIPs), as a primary investment option. Understanding what these entities offer as well as how they are authorized and managed is important for finance officers. Speakers will discuss
current issues with LGIPs and other pools, federal regulatory changes, GFOA’s Best Practice on using investment pools. 

**Moderator:** Mary Christine Jackman, Director of Investments, State of Maryland, Annapolis, MD  
**Speakers:** Michael Nguyen, Senior Vice President, PMA Financial Network, Inc., Naperville, IL; Paul Shamoun, Associate Director, Financial Services, Florida League of Cities, Tallahassee, FL

Sunday, 3:50 p.m. – 4:40 p.m.  
**Getting it Right: Implementing the OMB’s New “Super Circular”**  
**Room 113**  
1 CPE Accounting – Governmental

The U.S. Office of Management and Budget’s (OMB) recent Circular, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, commonly known as the “Super Circular,” supersedes and combines the requirements of eight previous OMB Circulars related to federal grants. The new OMB guidance poses practical challenges for both auditors and grant recipients. This session will identify those challenges and offer guidance on how to meet them from the vantage point of both auditors and grant recipients. 

**Moderator:** Sara Jantz, Director of Accounting, Sedgwick County, Wichita, KS  
**Speakers:** Heather Acker, Partner, Baker Tilly Virchow Krause, LLP, Madison, WI; Anne Fritz, Finance Director, City of St. Petersburg, St. Petersburg, FL

Sunday, 3:50 p.m. – 4:40 p.m.  
**Local Governments and Sports**  
**Room 114**  
1 CPE Economics

Only a few major cities are home to professional sports franchises. However, the impact of smaller sports-related events and attractions such as minor league or college athletics, amateur tournaments, races, conventions, major spectator events, and televised competitions is real for many small, mid-sized, and large governments. Financing projects, and determining what to develop to support long-term economic impact objectives, have become regular topics of discussion among local, regional, and state government entities. This session will outline the key drivers to success in financing, operating, and organizing a robust economic development plan related to tourism and sports tourism. And perhaps more importantly, the session will also outline what to avoid, how to encourage
private sector investment, and how to evaluate the proper mix of programming for your community.

**Moderator:** Monika Arris, Director of Budget & Finance, Collin County, McKinney, TX  
**Speakers:** Joel Maxcy, Associate Professor, Drexel University, Philadelphia, PA; Patricia A. Phillips, Director of Finance, City of Virginia Beach, Virginia Beach, VA

Sunday, 3:50 p.m. – 4:40 p.m.  
**The New Gold Standard: A Practical Guide to the GFOA’s CPFO Program**  
**Room 119**  
**1 CPE Management Advisory**  
It is no longer enough for a CFO to be an expert in a single discipline. Today’s successful CFO must obtain a solid background in the full range of finance-related disciplines. The GFOA’s Certified Public Finance Officer (CPFO) Program is designed to help participants do just that. This discussion and networking session will examine how the GFOA’s CPFO Program operates, and the advantages it offers to participants. Attend this session to meet other CPFOs and prospective CPFOs.  
**Moderator:** John Wallingford, Director of Financial Services, Prince William County Public Schools, Manassas, VA  
**Speakers:** Bruce Chase, Director of the Governmental and Nonprofit Assistance Center, Radford University, Radford, VA; Sandy Stephens, Assistant Director of Finance, City of Kirkwood, Kirkwood, MO

Sunday, 3:50 p.m. – 4:40 p.m.  
**The Truth About Wellness Programs**  
**Room 120**  
**1 CPE Personnel / Human Resources**  
Many employers now have wellness plans, and with encouragement from the Affordable Care Act, more will likely follow. But there are many ways to structure and manage a wellness program, and unfortunately, not all of them provide the promised payoffs for either employer or employee. Speakers will discuss important components of wellness plans — such as the role of onsite clinics, common mistakes organizations make, and effective strategies for establishing plans that allow employees to lead healthier lifestyles while lowering insurance premiums and long-term liabilities.  
**Moderator/Speaker:** Bret Starr, Budget Administrator, City of Irving, Irving, TX  
**Speaker:** Dr. Jeff Wells, President, OurHealth, Indianapolis, IN
Welcome Reception
Come experience one of Philadelphia’s top tourist attractions in an exclusive after hours event for GFOA conference attendees!

Sunday, May 31 • 6:00 p.m. – 8:00 p.m.
The Franklin Institute • Philadelphia’s #1 attended museum!
(222 N. 20th St., Philadelphia, PA)

Founded in honor of America’s first scientist, Benjamin Franklin, The Franklin Institute is one of America’s oldest and premier centers of science education. While the museum will remain closed to the general public, GFOA conference attendees and their guests will receive complimentary general admission to the museum and access to the many interactive exhibitions, including:

• **Your Brain** — an 18-foot tall web of firing neurons
• **The Giant Heart** — a 2-story tall Giant Heart
• **Franklin Air Show** — feel the force for flight and prepare for takeoff
• **Tuttleman IMAX® Theater** — featuring “Humpback Whales”
• **Franklin Theater** — experience “Prehistoric Planet: Walking with Dinosaurs 3D”
• **Fels Planetarium** — showing “Wildest Weather in the Solar System”

Visit www.fi.edu for a full list of current exhibits.
Appetizers featuring some of Philadelphia’s popular foods and beverages will be available throughout the reception. Representatives from the Philadelphia Convention & Visitors Bureau will be on hand to help you make dinner reservations for later in the evening.

We look forward to seeing you there!

- The reception is complimentary and registered attendees and guests are encouraged to attend.

- **Please wear your badge for admittance.**

- A continual courtesy shuttle service will be provided to and from all GFOA official conference hotels to The Franklin Institute from 5:45 p.m. to 8:30 p.m. Please see page 15 for the evening’s shuttle service route.
Monday At-A-Glance

Conference Registration
8:00 a.m. – 4:00 p.m.

Opening General Session
8:30 a.m. – 10:10 a.m., Terrace Ballroom, 2 CPE credits

Concurrent Sessions
10:30 a.m. – 12:10 p.m.

GFOA Products and Services Booth
11:00 a.m. – 5:00 p.m.

Exhibit Hall
11:00 a.m. – 5:00 p.m.

Delegate Luncheon
12:10 p.m. – 1:10 p.m., Hall D

Best Practices in School/Community College Lunch
12:10 p.m. – 1:30 p.m., Room 115-C

Concurrent Sessions
Monday, 1:30 p.m. – 2:20 p.m.

Concurrent Sessions
Monday, 2:40 p.m. – 3:55 p.m.

Concurrent Sessions
Monday, 4:15 p.m. – 5:30 p.m.

GFOA Urban Forum*
4:15 p.m. – 5:30 p.m., Room 119

*Please RSVP to www.gfoa.org/rsvp
Opening General Session
8:30 a.m. – 10:10 a.m.
Terrace Ballroom 2 CPE credits, Management Advisory

President’s Address
Robert W. Eichem, Chief Financial Officer, City of Boulder, CO

Keynote Address
John C. Bogle, the Founder and retired CEO of The Vanguard Group, Inc., President of the Bogle Financial Markets Research Center, and best-selling author will participate in a discussion with moderator, Joe Mysak, Editor of the daily Bloomberg Brief. He will also take questions directly from delegates in attendance. Labeled as one of the investment industry’s four “Giants of the 20th Century” by Fortune and one of the 100 most powerful and influential people by TIME magazine, Mr. Bogle will discuss his experience and thoughts on public finance and investing — including how his work to revolutionize low cost index fund investing can be applied to meet unique challenges faced by the public sector.

Concurrent Sessions
Monday, 10:30 a.m. – 12:10 p.m.

Canadian Update – Public–Private Partnerships, Accounting Changes, and the new CPA Designation
Room 117 2 CPE Accounting – Governmental
This year’s session will focus on three topics of direct interest to Canadians: 1) Throughout Canada, Public–Private Partnerships (P3s) have been embraced as a financing option to address large infrastructure projects. This session will discuss the history of P3s, their advantages and disadvantages, and detailed insight in terms of how P3s work and can be effectively applied by government; 2) New accounting standards that will be impacting annual financial reports; 3) The benefits of the new CPA designation in Canada, how to become a new CPA, and how employers can be involved in the training. In addition, participants will have the unique opportunity to share ideas, concerns, and information with members of GFOA’s Committee on Canadian Issues.
Moderator: Kevin Bertles, Director, Financial Services, City of Vernon, Vernon, BC
Monday, June 1

**Speakers:** John Martin, City Treasurer and Chief Financial Officer, City of Moncton, Moncton, NB; Michael Ruta, Chief Financial Officer, City of Winnipeg, Winnipeg, MB; Kevin Travers, Partner, KPMG LLP, Toronto, ON; Suzanne Fillion, Manager, Financial Services, City of Surrey, Surrey, BC

Monday, 10:30 a.m. – 12:10 p.m.
**Fifty Shades of Green – Demystifying Green Bonds**

Room 114  2 CPE Finance

Green bond issuance has generated significant attention as this market rapidly expands. This session will examine the issuance of green bonds and provide issuers with an understanding of this nascent market, which is expected to reach $40 billion of issuance worldwide in 2015. Speakers will provide information on green bond principles, potential benefits and risks, green bond opinion processes, and investors, along with practical guidance on issuing green bonds.

**Moderator:** Mark Kim, Chief Financial Officer, DC Water, Washington, DC

**Speakers:** Heike Reichelt, Head of Investor Relations & New Products, World Bank, London, England; Colin MacNaught, Former Assistant State Treasurer for Debt Management, State of Massachusetts, Boston, MA; Lindsay Smart, Head of UK & US Markets, Vigeo, London, United Kingdom; Charles Perl, Deputy CFO, San Francisco Public Utilities Commission, San Francisco, CA; Mahesh Jayakumar, CFA, FRM, Vice President / Senior Portfolio Manager, State Street Global Advisors, Boston, MA

Monday, 10:30 a.m. – 12:10 p.m.
**New Realities in Managing Liquidity**

Room 121  2 CPE Finance

Money market investors have endured regulatory uncertainty and near zero interest rates for almost six years. In light of the SEC’s decision to implement further reforms, and with a rising rate environment on the horizon, investors must prepare for the reality that not all money funds are created equal. Attend this session to explore how treasury professionals can adapt to this changing landscape and be successful in a new era of cash management.

**Moderator:** Robert W. Scott, Director of Finance / Treasurer, City of Brookfield, Brookfield, WI
Speakers: Darrel Thomas, Assistant City Manager/COO, City of Weston, Weston, FL; Scott McIntyre, Senior VP, First SouthWest Asset Management, Austin, TX; Michelle Durgy, Investment Director, City and County of San Francisco, San Francisco, CA; Ossie Spector, Senior Product Officer, North America Liquidity Product Solutions, Bank of America, New York, NY

Monday, 10:30 a.m. – 12:10 p.m.
**Pension Risk Management**

Room 120  
2 CPE Finance

The goal of public pension fund asset allocation can no longer be focused solely on outperforming the benchmarks the plan uses for comparison. Recent changes to GASB and rating agency liability calculation methodologies have brought renewed focus to managing funding volatility and developing a plan to reduce the unfunded pension liability. This session will provide case study examples and effective strategies for identifying and implementing the appropriate risk management strategy for public pension plans.

**Moderator:** Ari Sky, Chief Financial Officer, City of New Bedford, New Bedford, MA

**Speakers:** Rick Funston, Managing Partner, Funston Advisory Services LLC, Bloomfield Hills, MI; Dr. Susan Mangiero, AIFA, CFA, FRM, PPC, Managing Director, Fiduciary Leadership, LLC, Trumbull, CT; Uri Z. Monson, Chief Financial Officer, Montgomery County, PA

Monday, 10:30 a.m. – 12:10 p.m.
**The Accounting and Auditing Year in Review**

Terrace Ballroom  
2 CPE Accounting - Governmental

Each year, the Executive Director of the National Association of State Auditors, Comptrollers, and Treasurers and the Director of the GFOA’s Technical Services Center present a comprehensive overview of developments in the past year that affect accounting and auditing professionals who serve state and local governments, with special emphasis on topics not covered in separate sessions. Among other topics, this session will review the most recent pronouncements and due-process documents of the Governmental Accounting Standards Board (GASB).

**Moderator:** Michele Mark Levine, Deputy Comptroller for Accountancy, Office of the Comptroller of the City of New York, NY

**Speakers:** Kinney Poynter, Executive Director, NASACT, Lexington, KY; Stephen Gauthier, Director, Technical Services Center, GFOA, Chicago, IL
Monday, June 1

**Delegate Luncheon**
12:10 p.m. – 1:10 p.m.  
Hall D
This is a great opportunity to network.  
*(Lunch is not open to guests or exhibitors.)*

**Best Practices in School/Community College Lunch**
12:10 p.m. – 1:10 p.m.  
Room 115-C
Join other GFOA members from school districts and community colleges for lunch. GFOA staff will be available to provide a short overview of GFOA’s best practices for school budgeting and the Smarter School Spending website. Attendees must RSVP to www.gfoa.org/school-lunch.

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**Concurrent Sessions**
Monday, 1:30 p.m. – 2:20 p.m.

**Bringing the Sharing Economy to Governments**
Room 122  
1 CPE Management Advisory
Learn how the public sector is incorporating the ideas of the sharing economy. Intergovernmental agreements and platforms, such as MuniRent, are allowing governments to rent capital equipment and contract talent while allowing other governments an opportunity to offset maintenance costs for assets and gain new revenues. Learn how municipalities are embracing the sharing economy to enhance efficiency by eliminating many administrative hurdles from renting and contracting, promoting cost savings through sharing of assets at lower-than-market rate, and creating a network from which governments can share and collaborate.  
**Moderator:** Nancy Zielke, Senior Director, Alvarez & Marsal, Kansas City, MO  
**Speakers:** Alan Mond, CEO, MuniRent, Emeryville, CA; Don Newell, Public Works Operations Manager, Marion County, Salem, OR

Monday, 1:30 p.m. – 2:20 p.m.

**Fair Enough! The Implementation of the GASB’s New Guidance on Fair Value**
Room 120  
1 CPE Accounting - Governmental
The Governmental Accounting Standards Board (GASB) has recently issued final guidance on fair value reporting
and its application to specific assets and liabilities. This session will explore the new GASB guidance and will provide examples of its practical application.

**Moderator:** Alexandra Johnson, Assistant Audit Manager, Washington State Auditor’s Office, Olympia, WA

**Speakers:** Melinda M. Gildart, CPA, MBA, Chief Financial Officer, Illinois Finance Authority, Chicago, IL; Ted Williamson, Partner, RubinBrown LLP, St. Louis, MO

Monday, 1:30 p.m. – 2:20 p.m.

**How to Recruit the Next Generation of Finance**

*Room 121*  
*1 CPE Personnel / Human Resources*

With changing attitudes about work among those joining the workforce, managers need new strategies for recruiting a skilled staff. This session will focus on identifying what new skills are needed in the finance office and identifying creative and effective ways to recruit the “millennial” generation into the finance office. Attend this session to find out what the finance office of the future will require and how to meet those needs.

**Moderator:** Marilou Moore, Budget Coordinator, City of Lynwood, Lynwood, WA

**Speakers:** Donna Serdula, President, Vision Board Media / LinkedIn - Makeover.com, Delran, NJ; Bob Lavigna, Assistant Vice Chancellor - Human Resources, University of Wisconsin, Madison, WI

Monday, 1:30 p.m. – 2:20 p.m.

**Muni Bonds Best Practices**

*Room 113*  
*1 CPE Finance*

This session will highlight GFOA’s best practices related to debt issuance. Attendees will hear from their peers and other practitioners about the importance of developing and implementing debt policy and procedures. GFOA’s best practices will be highlighted for members to better understand the ins and outs of debt issuance and management. The session will also discuss how to set up the appropriate personnel to handle these responsibilities.

**Moderator:** Rodney Miller, Assistant City Manager / CFO, City of Hickory, Newton, NC

**Speakers:** Kenton Tsoodle, Assistant Finance Director, City of Oklahoma City, Oklahoma City, OK; Pat McCoy, Director of Finance, Metropolitan Transportation Authority, New York, NY
Monday, June 1

Monday, 1:30 p.m. – 2:20 p.m.

No More “Black Box”: Ensuring Effective Security for IT

Room 114

1 CPE Management Advisory

As advances in information technology continue at an ever increasing pace, so too do the security challenges that accompany them. This session will explore a variety of IT security challenges faced by governments as a result of new technologies. Speakers will address common concerns such as “bring your own device,” social media concerns, website hacks, malware, concerns with cloud computing, and others.

Moderator: Linda Senne, Controller, City of Venice, Venice, FL

Speakers: Kyle Foley, CISA, CGEIT, CRISC, Senior Managing Consultant, IBM Global Business Services, Public Sector Cybersecurity & Privacy Practice, Herndon, VA; Joshua Beeman, Information Security Officer, University of Pennsylvania, Philadelphia, PA

Concurrent Sessions

Monday, 2:40 p.m. – 3:55 p.m.

Addressing the Fundamentals of Your Finances

Room 122

1.5 CPE Finance

Finance officers are often very focused on current revenues and expenditures, but not nearly focused enough on the factors that ultimately drive tax revenue, such as tax and fee policies, economic development, demographics, population, and land-use policies. This session will explore what finance officers can and should be doing to understand these factors, communicate issues to key stakeholders, and ultimately work with appropriate leaders to improve long-term financial sustainability.

Moderator: Mickie Pearsall, Budget officer, Milwaukee Metropolitan Sewerage District, Milwaukee, WI

Speakers: David Schmiedicke, Finance Director, City of Madison, Madison, WI; Joe Minicozzi, Principal, Urban3, Asheville, NC; Michael Piper, MBA, AAS, CPE, Chief Assessment Officer, City of Philadelphia, Philadelphia, PA
Monday, June 1

Monday, 2:40 p.m. – 3:55 p.m.
**Coloring Within the Lines: Avoiding Common Financial Reporting Deficiencies**  
*Room 113*  
*1.5 CPE Accounting – Governmental*

Each year, reviewers for the GFOA's Certificate of Achievement for Excellence in Financial Reporting Program examine thousands of comprehensive annual financial reports (CAFRs) submitted to the program. This session will consider common reporting deficiencies and misunderstandings uncovered by those reviews.

**Moderator:** Kelly Neal, Assistant Finance Director, City of Edmond, Edmond, OK  
**Speakers:** Dennis Kauffman, Finance Operations Manager, City of Sacramento, Sacramento, CA; Cara Fitzpatrick, CPA, CFE, Accounting Manager, Department of County Management, Multnomah County, Portland, OR; Stephanie M. Walker, CPA, CPFO, Director of Finance & Administration, City of Gaithersburg, Gaithersburg, MD

Monday, 2:40 p.m. – 3:55 p.m.
**Data Driven Decisions**  
*Room 121*  
*1.5 CPE Management Advisory*

By now, the term “big data” is familiar to many. However, the application of it, and specifically what it is, remains largely unknown. In reality, some governments are using data for predictive analytics to understand relationships, improve decision making, and ultimately improve service delivery. This session will explain “big data” and address what it is, why it is important to governments, if it is something that is for all governments, how governments can get started and apply it, and the ultimate impact on citizens.

**Moderator:** Angela Means, Division Manager, Financial Services, City of Austin, Austin, TX  
**Speakers:** Jonathan Feldman, Chief Information Officer, City of Asheville, Asheville, NC; Stacey Mosley, Data Services Manager, Office of Innovation & Technology, City of Philadelphia, Philadelphia, PA; Katie Nelson, Associate Director of Data and Product Development, PolicyMap, Philadelphia, PA
Monday, June 1

Monday, 2:40 p.m. – 3:55 p.m.
**Improve Your Personal Productivity**

Room 114  1.5 CPE Personal Development

Who doesn’t wish they had more time during the day to get things done? Personal productivity techniques can be a powerful tool for creating more time in the work day. Similarly, when combined with overall Lean process improvement strategies, these tools can be effective in transforming the culture of an office. Speakers will discuss specific personal productivity enhancement approaches they have found beneficial and how those techniques fit within a systemic approach to improving productivity within the office.

**Moderator:** Robert Bendzick, Chief Financial Officer, Olmsted County, Rochester, MN

**Speakers:** Melissa Field, Process Improvement Specialist, City and County of Denver, Denver, CO; Vivian Calkins-McGettigan, MBA, CPA, CPFO, CIA, CFE, Deputy County Administrator, York County, Yorktown, VA; Harry Kenworthy, Principal & Manager, QPIC, LLC, Marlborough, CT

Monday, 2:40 p.m. – 3:55 p.m.
**Managing Revenue in Water Systems**

Room 119  1.5 CPE Management Advisory

Water, or lack thereof, is becoming an increasingly important issue throughout the country. Water supply and the infrastructure to deliver that supply is of the utmost importance to many communities. Maintaining current revenues, finding additional funding sources, and maximizing revenue flow are just a few of the issues confronting water agencies today. In this session, experts in the utility field will present common sense answers and solutions to the myriad of complex problems associated with water utility revenue management.

**Moderator:** Rodney Greek, Controller, San Diego County Water Authority, San Diego, CA

**Speakers:** Debby Cherney, Deputy General Manager, Eastern Municipal Water District, Perry, CA; Jeff Hughes, Director, Environmental Finance Center at UNC-Chapel Hill, Chapel Hill, NC
Monday, June 1

Monday, 2:40 p.m. – 3:55 p.m.
**SEC Municipal Advisor Rule: Regulatory Next Steps and Issuer Reaction**

*Room 120*  
1.5 CPE Finance

In July of 2014 the Securities and Exchange Commission (SEC) began implementation of its “Municipal Advisor” (MA) Rule. The Rule changes the nature of communication between participants in municipal bond issues. Attend this session to learn how the Rule has changed interactions between governments, underwriters, and financial advisers; hear from federal officials about additional regulations in this area; and share the experiences of your bond issuing entity in adapting to the new rule.

**Moderator/Speaker:** B. Jonas Biery, Debt Manager, City of Portland, Portland, OR

**Speakers:** Rebecca Olsen, Chief Counsel, Securities and Exchange Commission, Washington, DC; Peggy McCarthy, Finance Director, City of Tukwila, Tukwila, WA; Michael L. Post, General Counsel—Regulatory Affairs, Municipal Securities Rulemaking Board, Alexandria, VA

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**Concurrent Sessions**

Monday, 4:15 p.m. – 5:30 p.m.

**Best in Budgeting: Implementing the GFOA’s Budgetary Best Practices**

*Room 120*  
1.5 CPE Finance

The GFOA has developed a broad range of best practices for budgeting. This session will examine a number of these best practices and offer case studies on their practical application. Speakers will focus on how governments of different sizes and types can implement the best practices and improve budget decision making and communication.

**Moderator:** Michael A. Bryant, Management & Budget Director, OMB, Mecklenburg County Government, Charlotte, NC

**Speakers:** Tina Tapley, CPA, CA, Director of Finance / City Treasurer, City of Fredericton, Fredericton, NB; Jimmy Forbis, Finance Director / City Treasurer, City of Monterey, Morgan Hill, CA; Walter C. Rossman, Budget Director, City of Palo Alto, Palo Alto, CA
Monday, June 1

Monday, 4:15 p.m. – 5:30 p.m.

**Can We Talk? Effective Fraud Interviewing Techniques**

Room 113  **1.5 CPE Auditing - Governmental**

Effective interviewing is critical to any effort to follow up on indications of fraud or potential fraud. Interviewing in the context of fraud poses unique challenges and requires special care. This session will explore effective techniques for interviewing different levels of staff and elected officials when fraud has been discovered or is suspected.

**Moderator:** Anne P. Harty, CPA, Chief Financial Officer, City of Rock Hill, Rock Hill, SC

**Speakers:** Pamela Baker, CPA, CGFM, Partner, Barbacane, Thornton & Company LLP, Wilmington, DE; Fiona Chen, MPA, PH.D., CPA, ABV, CFF, CITP, President, Fiona Chen Consulting Company, Algonquin, IL; Daniel Porter, CFE, Special Investigations Unit, Comptroller of the Treasury, State of Tennessee, Nashville, TN

Monday, 4:15 p.m. – 5:30 p.m.

**Chart of Accounts: The Foundation of Modern Financial Systems**

Room 121  **1.5 CPE Accounting - Governmental**

Over the past two decades, enterprise resource planning (ERP) and integrated enterprise-wide financials have become common in public-sector finance. However, many organizations continue to struggle with setting up systems correctly and therefore never see the full potential of the system, especially in areas related to the chart of accounts. A good chart of accounts provides the flexibility to support reporting, analysis, and differing views of organizational performance related to all levels within a government. This session will address best practices in the initial development of enterprise systems along with updating financial account relationships related to changing organizational needs. The session will also address adapting the chart of accounts to support modern financial concepts such as workflow, reporting, security design, and internal controls.

**Moderator:** Amy Weise, Deputy County Controller, Allegheny County, Pittsburgh, PA

**Speakers:** Shyam Jajodia, Vice President, LSI Consulting, Winchester, MA; Marita J. Kelley, Policy Manager, Department of Community and Economic Development, Harrisburg, PA; Cory Kampf, Division Manager, Finance and Central Services, Anoka County, Anoka, MN
Monday, 4:15 p.m. – 5:30 p.m.
**Developing Investment Policies**

**Room 122**

1.5 CPE Finance

Investment policies not only serve as written guides, they also act as report cards. This session will cover the basics of developing an investment policy for an organization based on GFOA’s best practices on investment policies. Speakers will discuss how to develop a policy that includes proper guidance and stands up to changes from a regulatory, market, and political perspective. Lastly, the session will provide strategies on how to best maintain the policies after they are developed.

**Moderator:** David C. Olsen, Treasurer, City of Warwick, Warwick, RI

**Speakers:** John Grady, Managing Director, Public Trust Advisors, Orlando, FL; James M. Nicholson, Finance Director, City of Pataskala, Pataskala, OH

Monday, 4:15 p.m. – 5:30 p.m.

**How Much Is Enough? Determining Appropriate Levels of Capital Investment**

**Room 114**

1.5 CPE Finance

Upkeep and investment in infrastructure and other capital assets by many public sector organizations continue to be a challenge. This session will explore how to determine the appropriate level of capital investment and how to analyze reserve levels given the risks facing an organization. Speakers will focus on how to evaluate infrastructure liability and implement a strategy to adequately address needs.

**Moderator/Speaker:** Jan Hawn, CPFO, Finance Director, City of Bellevue, Bellevue, WA

**Speakers:** Tom Dawe, President, Public Sector Digest, London, ON; Gary Donaldson, Revenue Chief, City of Atlanta, Atlanta, GA
Tuesday At-A-Glance

Conference Registration
8:30 a.m. – 4:00 p.m.

GFOA Products and Services Booth
10:00 a.m. – 2:30 p.m.

Exhibit Hall
10:00 a.m. – 2:30 p.m.

Concurrent Sessions
10:20 a.m. – 12:00 p.m.

Annual Business Meeting and Luncheon
12:15 p.m. – 1:40 p.m., Terrace Ballroom

Concurrent Sessions
2:00 p.m. – 3:15 p.m.

Concurrent Sessions
3:35 p.m. – 4:50 p.m.

GFOA Closing Event
7:00 p.m. – 10:30 p.m., Pennsylvania Convention Center
See pages 52-53 for details.
Keynote Address
Michael Nutter, the Mayor of the City of Philadelphia, Pennsylvania, since 2008 will address GFOA conference delegates with a presentation, “The New City: Tech and Innovation in a Changing Philadelphia.” Echoing the conference’s themes, Mayor Nutter’s leadership has embodied both innovation and resilience, steering the City through the worst recession since the Great Depression and pioneering initiatives that harness technology to improve service delivery, expand the technology sector, and create learning partnerships to ensure that Philadelphians have a foothold in the future of this fast-growing field.

Concurrent Sessions
Tuesday, 10:20 a.m. – 12:00 p.m.

Getting the Word Out: How To Communicate Financial Information to Citizens
Room 121  2 CPE Communications
The high level of participation in the GFOA’s professional award programs for comprehensive annual financial reports and budget documents amply demonstrates that many governments are already successful at communicating high quality and highly detailed financial information. Making key financial information accessible to ordinary citizens, however, often remains a continuing challenge. This session will explore different ways to do just that — from the preparation of a popular annual financial report to various website options, such as the “open checkbook.”

Moderator: Lenny Moore, CPA, MPA, Controller, Montgomery County Government, Rockville, MD
Speakers: Andrew McCreery, Finance Director, Municipality of Mt. Lebanon, Pittsburgh, PA; Karin M. Smith, MBA, SFO, CFE, Partner, Heinfeld, Meech & Co., P.C., Phoenix, AZ; Victoria A. Lewis, dataMontgomery Project Manager, Montgomery County Government, Rockville, MD
Tuesday, June 2

Tuesday, 10:20 a.m. – 12:00 p.m.
**Not Quite Retired: An Update on the Implementation of the GASB’s New Pension Standards**

Many governments only now are starting to grapple with the practical challenges of implementing the Governmental Accounting Standards Board’s (GASB) new pension guidance. This session will examine a variety of technical issues addressed by the GASB in its recent pension-related Implementation Guides, as well as the audit challenges for participants in multiple-employer plans and how they are being met.

**Moderator:** Barry C. Faison, Chief Financial Officer, Virginia Supplemental Retirement System, Richmond, VA

**Speakers:** Debra Roberts, Chief Financial Officer, Maryland Supplemental Retirement Plans, Baltimore, MD; Jeff Markert, Partner, KPMG, Western Springs, IL; Jim Rizzo, Senior Consultant & Actuary, Gabriel Roeder Smith & Company, Fort Lauderdale, FL

Tuesday, 10:20 a.m. – 12:00 p.m.
**SEC Enforcement: The MCDC Initiative and Ongoing Disclosure Enforcement**

The SEC is increasing the focus of its enforcement efforts on the municipal securities sector, and investigating municipal issuers as never before. This session will focus on the recent history of SEC enforcement actions, next steps, and GFOA best practices that provide guidance to governments on debt issuance strategies that comply with federal law.

**Moderator/Speaker:** J. Ben Watkins, Director, Division of Bond Finance, State of Florida, Tallahassee, FL

**Speakers:** LeeAnn Ghazil Gaunt, Chief, Municipal Securities and Public Pensions Unit, Enforcement Division, United States Securities and Exchange Commission, Boston, MA; Dave A. Sanchez, Counsel, Sidley Austin LLP, San Francisco, CA; Kristi Kordus, Finance Director, Marathon County, Wausau, WI
What Governments Look for in a CFO

Room 114  2 CPE Management Advisory

Finance directors and CFOs not only need to have the technical competency to manage the finances of the organization, they also must possess the leadership skills to serve on the executive team of the organization. A panel of city/county managers and other public sector CEOs will discuss what they look for in a CFO and how the role of a CFO fits in with the overall governance of the organization. Panelists will cover, among other topics, the role of the leadership team, interacting with elected officials, resolving conflicts, and assisting with strategic decision making. This seminar is designed for prospective finance directors and CFOs or those who currently hold the position and are looking to make themselves more valuable to their organizations.

**Moderator:** Laura Allen, Town Administrator, Town of Berlin, Berlin, MD  
**Speakers:** W. Patrick Pate, City Manager, City of Manassas, Manassas, VA; Michael J. Gurgone, CPA, CMA, Treasurer, Vice President of Finance, Chicago Housing Authority, Chicago, IL; Francine Ramaglia, Assistant City Manager, City of Delray Beach, Delray Beach, CA

Why Is This So Difficult? Taking Payments the Easy Way

Room 122  2 CPE Finance

Whether via the web, over the phone, or in person, both customers and governments are best served from an easy, streamlined payment receiving process. However, understanding how best to implement these types of systems presents some challenges. This session will explore real solutions available now to governments, review current rules related to accepting credit and debit cards and the fees associated with doing so, and present case studies for making the entire collections process easier for both the government and the customer.

**Moderator:** Cheryl Pattelli, Director of Finance, City of Boulder, Boulder, CO  
**Speakers:** Robert K. Gongwer, eReceivables Consultant – Vice President, Wells Fargo, Tampa, FL; Joe Helmy, Business Leader, Senior Account Manager, MasterCard, New York, NY; Rebecca Villareal-Mayer, Manager, City and County of San Francisco Treasurer & Tax Collector, San Francisco, CA
Annual Business Delegate Luncheon
12:15 p.m. – 1:40 p.m.   
Terrace Ballroom
Lunch is not open to guests or exhibitors.

Presiding: Robert W. Eichem, Chief Financial Officer, City of Boulder, CO

The GFOA holds an annual meeting of the members to conduct official business. At this meeting, the GFOA active members select new members of the Executive Board and vote on policy statements that have been prepared by the standing committees and recommended for approval by the GFOA Executive Board.

Comments by Incoming President: Heather A. Johnston, City Manager, City of Burnsville, MN

Lunch will be served immediately after the annual business meeting.

Concurrent Sessions
Tuesday, 2:00 p.m. – 3:15 p.m.

Developing a Comprehensive Benefit Strategy
Room 122  1.5 CPE Personnel / Human Resources

Carefully choosing the right benefits package pays off for employers and employees. Governments need to look over the components of their benefits plans to ensure that they are actually achieving their purpose, which is to promote the organization’s overall goals. For far too many organizations this very important (and expensive) area is misaligned with their mission. In this session, attendees will learn ways to approach developing a comprehensive benefit strategy, create a balanced and cost-effective benefits plan, and communicate the value to current and future employees.

Moderator: Casey Srader, Budget Manager, City of Plano, Plano, TX
Speakers: Rich Harris, Finance and Compliance Officer, Denver Employees’ Retirement Plan, Denver, CO; Glenn Sherman, Vice President, ICMA-RC, Washington, DC; J. Richard Johnson, Senior Vice President, Segal Consulting, Washington, DC
Tuesday, 2:00 p.m. – 3:15 p.m.
**Financial Policies: Getting Everyone On the Same Page**

*Room 113*  
1.5 CPE Finance

Financial policies set the foundation for sound financial management. This session will address how to develop policies in a way that creates real commitment to the policies, rather than perfunctory approval. It will cover essential policies to have, using the GFOA Budget Committee’s revised best practice as a guide. Attendees will be invited to compare their own policy structures to the best practice in a checklist-like format.

**Moderator:** Brad Harris, Finance and Accounting Consultant, University of Tennessee – MTAS, Dayton, TN

**Speakers:** Peggy Bunzli, Budget Officer, City of Boulder, Boulder, CO; Bob Cenname, Deputy Budget Director, City of Baltimore, Baltimore, MD; Merrill Shepherd King, Finance Director, City of Minnetonka, Minnetonka, MN

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Tuesday, 2:00 p.m. – 3:15 p.m.
**Project Management 101**

*Room 114*  
1.5 CPE Management Advisory

Throughout a year, finance officers serve as project managers for many of the organization’s most critical projects. While not all oversee construction projects or manage large technology deployments, the same project management principles that are essential in those arenas can be just as helpful in managing the budget process, year-end close, and other “projects” within the finance office. This session will stress the benefits of having a strong project management foundation as a means for ensuring success for any project. The session will provide an overview of project management foundations based upon the Project Management Institute (PMI) framework. During the presentation, speakers will address three topics: 1) the purpose of the founding principle, 2) how each principle is applied in the “real world,” and 3) the principle’s relevancy to the finance office.

**Moderator:** James Pyers, Senior Performance Project Manager, Ohio Performance Team, Wooster, OH

**Speakers:** Joe Eriole, Deputy Comptroller / Public Management Consultant, Ulster County, Kingston, NY; Martin Sullivan, Project Management Consultant, Line of Sight, LLC, Columbia, MD
Tuesday, June 2

Tuesday, 2:00 p.m. – 3:15 p.m.

**Read or Not: How To Prepare Citizens and Elected Officials for the New Pension and OPEB Accounting**

**Room 120**  
1.5 CPE Accounting – Governmental

“If you tell people before the fact, it’s an explanation; if you tell people after the fact, it’s an excuse.” The Governmental Accounting Standards Board’s new pension guidance will have a profound and highly visible impact on most state and local governments that offer pension benefits to their employees. This session will offer advice on how to explain in a way that is understandable to the general public: 1) what has changed, 2) why it has changed, and 3) what conclusions should or should not be drawn from these changes.

**Moderator:** Pamela Hodges, Controller, City of Carrollton, Carrollton, TX  
**Speakers:** Robert Scott, CFO/Assistant City Manager, City of Carrollton, Carrollton, TX; W. Louis Cannon, Partner, McGladrey LLP, New Bern, NC; John Gilberto, Partner, Cherry Bekaert LLP, Tampa, FL

Tuesday, 2:00 p.m. – 3:15 p.m.

**With All Deliberate Speed: Practical Tips for Speeding Up the Year-End Closing Process and the Financial Statement Audit**

**Room 121**  
1.5 CPE Accounting - Governmental

One of the most common complaints about state and local government financial reports is that they are not issued soon enough after the close of the fiscal year to meet the needs of financial statement users. This session will offer practical tips on how governments can accelerate the year-end closing process and the financial statement audit, including lessons learned and effective strategies for working with your financial accounting system during the year-end close process.

**Moderator:** James Golden, Director of Finance, City of Longmont, CO  
**Speakers:** Jon Munch, CPA, Director of Finance, Fauquier County Government & Public Schools, Warrenton, VA; Stephen Blann, Director of Governmental Audit, Rehmann, Grand Rapids, MI
Concurrent Sessions
Tuesday, 3:35 p.m. – 4:50 p.m.

A Fraud Anthology
Room 113  1.5 CPE Auditing - Governmental
To successfully detect fraud, it helps to know what you are looking for. This session will focus on different types of fraud encountered in the public sector and how to cope with them, as well as the latest fraud detection techniques (e.g., data mining). The session will also explore environmental factors that can increase the likelihood of fraud occurring.

Moderator: Erin Ballou, Assistant Director of Finance, Metropolitan Development & Housing Agency, Nashville, TN
Speakers: Kevin B. Huffman, Audit Manager–Investigations, Comptroller of the Treasury, State of Tennessee, Nashville, TN; Shauna Woody-Coussens, Managing Director, BKD, LLP, Kansas City, MO

ACA Update
Room 120  1.5 CPE Personnel / Human Resources
Meeting the dictates of the Affordable Care Act remains a costly and complicated concern for state and local governments. This session will give attendees a rundown of all the deadlines and concepts they need to be aware of in 2015, as well as letting them know about strategies other governments are employing to meet the ACA’s provisions and avoid penalties.

Moderator: John Tuohy, Deputy Treasurer, Arlington County, Arlington, VA
Speakers: Christopher Sears, Partner, Ice Miller LLP, Indianapolis, IN; Christopher Walker, Associate General Counsel & Director of Healthcare Compliance, Edgewood Partners Insurance Companies (EPIC), San Francisco, CA
“Smart growth” advocates argue that low density development is more expensive to service than high density. However, relatively few studies have quantified the cost differences associated with different patterns of development. Once development is in place, the struggle begins for municipalities to service development and pay for it. With increased development comes the need for more affordable housing that is often addressed through secondary suites (e.g. basement apartments). Participants will be provided with an overview of a growth costing model developed in Ontario and results from initial pilot municipalities. The session will also explore a Canadian municipality that has implemented fees for secondary suites to reduce the reliance on property taxes.

**Moderator:** Clae Hack, Director of Finance and Supply, City of Saskatoon, Saskatoon, SK

**Speakers:** Suzanne Fillion, Manager, Financial Services, City of Surrey, Surrey, BC; Michael Ptolemy, Manager, Tax and Revenue, Ontario Ministry of Municipal Affairs and Housing, Toronto, ON; Gary Scandlan, Associate Director, C.N. Watson & Associates, Mississauga, ON

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The groundwork following a disaster will often last a few days, weeks, or months. Addressing the financial work related to such recoveries, however, often takes years. While most governments are aware of these risks, many still lose millions of dollars because they are not prepared to deal with the financial aspects of the disasters. This session will cover how the finance office can best manage disasters before, during, and after the event itself. Topics covered will include appropriate reserve levels, construction standards, infrastructure stability, use of finance staff during a disaster, communications, crisis management, procurement of clean up services, FEMA intervention, and managing rebuilding efforts.

**Moderator:** Ann Carbone, Budget / Finance Director, PWD, City of Boston, Boston, MA
**Speakers:** Arif Rasheed, Deputy Director, City of Houston, Houston, TX; Andrew Salkin, Chief Operating Officer, 100 Resilient Cities, New York, NY

Tuesday, 3:35 p.m. – 4:50 p.m.

**Government Finance in Small Organizations***

Room 119  1.5 CPE Finance

Both large and small organizations face complex, although very different, challenges. However, small governments often face these issues with very few staff, limited resources, and many other competing priorities. This session will provide an opportunity for finance officers from smaller governments to present and discuss common issues and problems confronting them today, and to identify a structure for maintaining open lines of communication into the future.

*Moderator: Jeff Hansen, Finance Director, City of Golden, Golden, CO

*Please RSVP in advance to www.gfoa.org/rsvp

Tuesday, 3:35 p.m. – 4:50 p.m.

**Looking a Gift Horse in the Mouth: Effective Grants Management**

Room 114  1.5 CPE Management Advisory

“If you take the puppy, you have to raise the dog.” The typical grant is a gift that comes with a price tag. The GFOA recently developed best practice guidance on managing grants, which included the need to set a policy for evaluating potential grants before accepting them. This session will examine that issue, along with various other practical issues related to grants management such as matching requirements, tracking eligible expenditures, and ongoing monitoring and compliance.

*Moderator: Diane Reichard, CPA, CGMA, CGFO, CPFO, Chief Financial Officer / Assistant City Manager, City of Ocala, Ocala, FL

**Speakers:** William Hall, Director of Statewide Reporting, State of Vermont, Bethel, VT; Dawn Lang, Management Services Director, City of Chandler, Chandler, AZ; Allison E. Bradsher, Assistant Financial Officer, City of Raleigh, Raleigh, NC
GFOA’s Closing Event

Come join us for a night of food, fun, and entertainment!

Tuesday, June 2
7:00 p.m. – 10:30 p.m.
Pennsylvania Convention Center
Hall D and Terrace Ballroom

7:00 p.m. – 8:00 p.m. Dinner (Hall D)
8:00 p.m. Entertainment (Terrace Ballroom)

After several days of energetic sessions and invigorating discussions, we invite you to relax and enjoy the evening before heading back to your hometown. Start the night off with a buffet dinner in Hall D of the Pennsylvania Convention Center before heading over to the Terrace Ballroom for a night of entertainment.
This is a night not to be missed!

Adults: $50 onsite
Children/teens under 18: $25 onsite
Children under 5: Complimentary
Ticket price includes buffet dinner, beverages, and entertainment.
Purchase tickets onsite at GFOA Registration on the Bridges.
Please see page 15 for information about the evening’s shuttle service.

For information on the night’s entertainment, refer to GFOA Today or visit www.gfoa.org/now.
Wednesday At-A-Glance

Conference Registration
8:00 a.m. – 12:00 p.m.

Concurrent Sessions
8:30 a.m. – 10:10 a.m.

Concurrent Sessions
10:30 a.m. – 12:10 p.m.
Ensuring Quality in IT Projects

Room 114  2 CPE Management Advisory

Much has been written about the frequency and magnitude of delays, cost overruns, and complete project failures among information technology projects. While large-scale transformation projects consisting of technology change, process change, and organizational change are difficult, they are not impossible. By utilizing proven strategies and techniques for project planning, readiness, quality assurance, testing, and ongoing follow up, governments can greatly improve their chances of project success. In this session, panelists will discuss important elements of quality control in IT projects.

Moderator: J.D. Williams, Senior Manager, State and Local Governments, Oracle, Reston, VA

Speakers: Sally Elatta, President, Agile Transformation, Inc., Omaha, NE; Meir Schecter, Senior Consultant, LRWL Inc., New York, NY

The Inside Scoop: Lessons Learned in Internal Auditing

Room 120  2 CPE Auditing - Governmental

The internal audit function offers management an incomparable tool for meeting its internal control responsibilities. This session will consider the key elements of an effective internal audit function, with special emphasis on lessons learned from experience regarding what works and what does not.

Moderator: Bob Balducci, Comptroller, New York City Water and Sewer System, New York, NY

Speakers: John Hummel, Deputy Inspector General, Montgomery County Government, Rockville, MD; Cathy Jackson, Director, Audit and Management Services Department, Miami-Dade County, FL; Clara M. Ewing, Director—Risk Advisory Services, McGladrey LLP, Melbourne, FL
Wednesday, June 3

Wednesday, 8:30 a.m. – 10:10 a.m.
**The Resilient Government**

**Room 113**  
**2 CPE Finance**

Governments are redefining their long-term planning strategies to be flexible, collaborative, and forward thinking. The resilient government movement encourages organizations to consider today’s changing conditions and to identify what is needed to effectively withstand and recover from shocks and stresses. This session will highlight practical examples and case studies from finance leaders who are taking part in the movement to build a resilient government.

**Moderator:** Joseph F. Beach, Finance Director, Montgomery County Government, Rockville, MD

**Speakers:** Bob Eichem, Chief Financial Officer, City of Boulder, Boulder, CO; Mike Bailey, Finance Director, City of Redmond, Redmond, WA; Kevin Knutson, Regional Vice President, Management Partners, Cincinnati, OH

Wednesday, 8:30 a.m. – 10:10 a.m.
**Trends in the Muni Market**

**Room 121**  
**2 CPE Finance**

Rising interest rates are expected to continue to reduce new municipal debt offerings and refunding activity in the near term. In this environment, what approaches can governments take to bring new issues to market at reasonable rates? Speakers in this session will address market conditions and discuss investor trends including who wants to buy your bonds. Panelists will also review the pros and cons of nontraditional debt instruments in today’s interest rate environment.

**Moderator:** Katherine A. Newell, Director of Risk Management, New Jersey Educational Facilities Authority, Princeton, NJ

**Speakers:** Nancy Winkle, City Treasurer, City of Philadelphia, Philadelphia, PA; Jay M. Goldstone, Managing Director, MUFG Americas, Los Angeles, CA; Thomas Doe, President, Municipal Market Analytics (MMA), Concord, MA
Concurrent Sessions

Wednesday, 10:30 a.m. – 12:10 p.m.

Creative Uses of Existing Technologies

Room 120  2 CPE Management Advisory

The downturn in the economy drove many organizations to “do more with less,” especially when it came to purchasing new technology. This session will highlight how organizations have extended the life of existing systems, created short term solutions to defer large expenditures, and developed creative ways to deploy technology. Specific examples will include the use of excel, “borrowing and sharing” technology from other organizations, using functions for different purposes to meet related needs, and smart use of external resources.

Moderator: Fred Dean, Director, Finance Division, Pinellas County Clerk of the Circuit Court and Comptroller, Dunedin, FL
Speakers: Louis Boglioli, Assistant Finance Director, City of Stuart, Stuart, FL; Brandon Brown, GIS Administrator, City of Dublin, Dublin, OH; Casey Camors, CPA, CMA, CPFO, Director, Finance Division, City of Milwaukie, Milwaukie, OR

Here to Stay: How To Effectively Manage Capital Assets

Room 113  2 CPE Management Advisory

Almost all governments, regardless of size or type, need to deal with the issue of effectively managing capital assets. This session will explore how to effectively track assets, maintenance programs, renewal and replacement strategies, and compliance with generally accepted accounting principles (GAAP), including technology solutions available to capital assets managers.

Moderator: Jason Beal, President, Beal Budgeting, Indianapolis, IN
Speakers: Brian W. Caputo, Chief Financial Officer / City Treasurer, City of Aurora, Aurora, IL; Mark Bobber, Senior Managing Director, American Appraisal, Milwaukee, WI; Patrice Hilderley, CPA, CGA, Director of Administrative Services, City of Woodstock, Woodstock, ON
Wednesday, June 3

Wednesday, 10:30 a.m. – 12:10 p.m.
Making Performance Management Work

In theory, performance management in government should be easy. “Develop goals. Identify measures. Track progress. Learn what works. Report results. Make better decisions.” In practice, governments have struggled with connecting performance management to existing processes and actually using the information collected to improve services. With improvements in technology, it has become easier to collect data, but the challenge of how to use it persists. This session will present a panel of practitioners experienced in the topic to share lessons learned, recent developments, and practical guidance for getting value out of a performance management system.

Moderator: Christina Day, Budget Manager, Portland Community College, Portland, OR

Speakers: Randall Reid, Southeast Regional Director & Director of Performance Initiatives, International City/County Management Association, Gainsville, FL; Rebecca Rhynhart, Budget Director, City of Philadelphia, Philadelphia, PA; Stephanie Phillips, Managing for Results (MFR) Project Manager, Chester County, West Chester, PA; Bill Yake, Performance Measurement Coordinator, Fairfax County, Fairfax, VA

Wednesday, 10:30 a.m. – 12:10 p.m.
Successful Pension Reform

As organizations continue to address pension issues from finance, human resource, and political perspectives, many will be faced with the task of converting to an entirely different system. This session will provide case study examples from governments that have successfully modified their pension system. Topics discussed will include overall project governance, maintaining employee morale, plan design, decision making, achieving savings, and overall sustainability.

Moderator: Richard Schnuer, Finance Director, City of Champaign, Champaign, IL

Speakers: Flick Fornia, President, Pension Trustee Advisors, Inc., Centennial, CO; Diane Oakley, Executive Director, National Institute on Retirement Security, Washington, DC; Scott Shapiro, Senior Advisor, Office of Mayor Jim Gray, City of Lexington, Kentucky; Alex Brown, Research Manager, National Association of State Retirement Administrators, Washington, DC
Exhibitors are located in Hall C (second level) of the convention center. To learn more about each exhibitor and their products and services, refer to the Exhibitor Directory posted at www.gfoa.org.

**Exhibit Hours**

- **Sunday, May 31** 10:00 a.m. – 5:15 p.m.
- **Monday, June 1** 11:00 a.m. – 5:00 p.m.
- **Tuesday, June 2** 10:00 a.m. – 2:30 p.m.

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- **ICMA-RC** for delegate bags, Internet café, and co-sponsorship of charging stations
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- **Tyler Technologies** for delegate lanyards and sponsorship of the Minorities Scholarship
- **Oracle** for coffee breaks and general support
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- **MasterCard** for Wi-Fi
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The GFOA extends a gracious thank you to the members of the Philadelphia Local Conference Committee who donated both time and effort to general preparations. The conference could not be a success without their generous support.

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Pittsburgh, PA
The GFOA offers academic scholarships on an annual basis. The 2015 recipients are as follows:

**Daniel B. Goldberg Scholarship Recipient**  
*Funded by the Girard Miller Foundation*  
*Julia Carter,* University of Guelph, Ontario

**Government Finance Professional Development Scholarship Recipients**  
*Funded by the Government Finance Officers Association Scholarship Reserve*  
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*Barbara M. Newman,* Rutgers Business School, Newark & New Brunswick, New Jersey  
*Kimberly J. Stein,* American University, Washington, District of Columbia  
*Jina E. Turowski,* Kent State University, Kent, Ohio

**Frank L. Greathouse Government Accounting Scholarship Recipients**  
*Funded by the Government Finance Officers Association*  
*April Haring,* Rasmussen College, Eagan, Minnesota  
*Michele “Shelley” Kinder,* Western Governors University, Salt Lake City, Utah

**Minorities in Government Finance Scholarship Recipient**  
*Funded by Tyler Technologies*  
*Jose R. Leon,* Kellstadt Graduate School of Business, DePaul University, Chicago, Illinois
The Awards for Excellence in Government Finance program recognizes outstanding contributions to the practice of government financial management. The award stresses practical, documented work that offers leadership to the profession and promotes the use of best practices in public finance. The following two entities received the Award for Excellence in 2015. Samples of their winning submissions will be available on the GFOA’s website after the conference.

**Category: Pensions and Benefits**

*Orange County Employees Retirement System Encourages Financial Responsibility with Investment Management Fee Policy*

Orange County Employees Retirement System

Contact: **Girard Miller**, Chief Investment Officer  
2223 E. Wellington Ave  
Santa Ana, CA 92701  
714-558-6223  
gmiller@ocers.org

**Category: E-Government and Technology**

*Montgomery County Encourages Transparency with Readily Accessible Financial Information*

Montgomery County

Contact: **Joseph F. Beach**, Director of Finance  
101 Monroe Street, 15th Floor  
Rockville, MD 20850  
240-777-8870  
joseph.beach@montgomerycountymd.gov
The Government Finance Officers Association (GFOA), founded in 1906, represents public finance officials throughout the United States and Canada. The association’s more than 18,000 members are federal, state/provincial, and local finance officials deeply involved in planning, financing, and implementing thousands of governmental operations in each of their jurisdictions. The GFOA’s mission is to enhance and promote the professional management of governmental financial resources by identifying, developing, and advancing fiscal strategies, policies, and practices for the public benefit.

In furtherance of this mission, the GFOA offers a wide array of products and services to government finance professionals, including best practices, technical publications, training seminars, professional recognition programs, networking opportunities, research, and consulting.

Structure
An 18-member Executive Board elected by the membership governs the organization. The Executive Board establishes policy and direction for the association. In addition, there are seven standing committees, made up of 25 GFOA members each, each of which studies issues in their respective areas and proposes statements, best practices, and advisories to the Executive Board. These committees are specific to the areas of accounting, auditing and financial reporting; budgeting and financial policies; debt management; economic development and capital planning; pension and employee benefits administration; treasury and investment management; and Canadian issues. Policy statements adopted by the Executive Board are voted on by the membership at the annual business meeting held each year during conference.

The GFOA is headquartered in Chicago with offices in Washington, D.C. The association staff is organized as follows:

Office of the Executive Director
The Office of the Executive Director is responsible for the overall management of the association, external relations, and international relations. Strategic initiatives developed by the Executive Board are provided funding through member dues and overall association operations. (Chicago)
Federal Liaison Center
The Federal Liaison Center informs the GFOA members about federal legislation, regulations, judicial actions, and policies that affect public finance functions, and represents the interests of the GFOA in Washington, D.C. GFOA’s public policy statements are highlighted during regular contact with congressional leaders and key administration officials. Working with regulatory bodies that address issues affecting state and local governments is also a component of the center’s work. Center staff also collects, analyzes, and disseminates information to GFOA members about Washington activities. Additionally, by developing and promoting best practices and policy statements, the center helps GFOA members and public finance professionals enhance their operations. The center coordinates the efforts of the GFOA’s seven standing committees, the Women’s Public Finance Network, and the Black Caucus. The center also conducts the Advanced Government Finance Institute, an intensive week-long program that provides GFOA members from the United States and Canada an opportunity to enhance their leadership skills and focus on emerging trends within the public finance community. (Washington, D.C.)

Financial Administration Center
The goals of the Financial Administration Center are to manage the financial affairs of the organization, provide IT support to all GFOA centers, and administer the organization’s website. (Chicago)

Operations and Marketing Center
It is the responsibility of the Operations and Marketing Center to handle all logistics and marketing for the association’s training programs — including the annual conference, national training, live-streaming events, Internet training, and committee meetings. Through marketing and advertising, the center promotes membership in the association, participation in the annual conference, training events held throughout the year, publications, and the association’s awards programs. The center also manages administration for the association. (Chicago)
Research and Consulting Center
GFOA’s Research and Consulting Center provides services to support many of GFOA’s training events, the annual conference, publications, best practice committees, and other programs. GFOA consultants are recognized nationally as leaders in process improvement, best practice implementation, ERP procurement and implementation, long-term financial planning, budgeting, and performance management. Staff also conducts ongoing research with individual governments and independently on topics of interest to the entire membership — for example, for the previous two years, staff has been working on resources for best practices in school budgeting and rolling out GFOA’s smarter school spending website (smarterschoolspending.org). (Chicago)

Technical Services Center
The Technical Services Center provides technical information, products, and services to GFOA members and others interested in government finance regarding accounting, auditing, financial reporting, and the preparation of budget documents. At the heart of the center’s activities are five professional recognition programs: the Award Program for Small Government Cash Basis Reports, the Certificate of Achievement for Excellence in Financial Reporting Program, the Distinguished Budget Presentation Awards Program, the Canadian Award for Financial Reporting Program, and the Popular Annual Financial Reporting Award Program. The center also offers a technical inquiry service for individuals interested in the proper application of governmental accounting, auditing, and financial reporting standards, the preparation of high quality budget documents, and best practices in accounting and budgeting. Staff members also serve as authors of publications and periodicals, prepare educational materials, and serve as instructors in numerous national training seminars, including Internet and live Web-stream events. (Chicago)

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1906 Washington, DC: Meeting with Census Bureau Officials
1906 Chicago, IL: *S.B. Williams, Rochester, NY
1907 Richmond, VA: *Louis Betz, St. Paul, MN
1908 Washington, DC: *Louis Betz, St. Paul, MN
1909 Detroit, MI: *Alonzo Tweedale, District of Columbia
1911 Washington, DC: *Edmond D. Fisher, New York, NY
1912 Buffalo, NY: *Samuel M. Wilhite, Louisville, KY
1913 Chattanooga, TN: *Samuel M. Wilhite, Louisville, KY
1914 Milwaukee, WI: *Edward S. Osborne, Rochester, NY
1915 San Francisco, CA: *Thomas F. Boyle, San Francisco, CA
1916 Syracuse, NY: *Louis M. Kotecki, Milwaukee, WI
1917 Chicago, IL: *Mark E. Conan, Syracuse, NY
1918 Atlantic City, NJ: *Joseph S. Pike, Somerville, MA
1919 Baltimore, MD: *Louis E. Gosselin, Chicago, IL
1920 St. Paul, MN: *Cyrus C. Pashby, Memphis, TN
1921 Buffalo, NY: *Cyrus C. Pashby, Memphis, TN
1922 Colorado Springs, CO: *Albert G. Preston, Buffalo, NY
1923 Milwaukee, WI: *Albert G. Preston, Buffalo, NY
1924 Providence, RI: *Theodore D. Caswell, Augusta, GA
1926 Kansas City, MO: *Clifford E. Cook, Springfield, MA
1927 Ottawa, ON: *W.S. Hanna, Baltimore, MD
1928 Atlanta, GA: *Theodore N. Waddell, State of Massachusetts
1929 Chicago, IL: *Charles J. Tulley, Ottawa, ON
1930 Denver, CO: *B. Graham West, Atlanta, GA
1931 Toronto, ON: *Frank J. Flanagan, Chicago, IL
1932 Washington, DC: *George D. Begole, Denver, CO
1933 Cincinnati, OH: *C.E. Armstrong, Birmingham, AL
1935 Knoxville, TN: *G.A. Lascelles, Toronto, ON
1936 Toronto, ON: *D.P. Turnbull, Kalamazoo, MI
1937 Boston, MA: *Arthur C. Meyers, St. Louis, MO
1938 St. Paul, MN: *Miner B. Phillipps, Pasadena, CA
1940 Detroit, MI: *E.E. Hagerman, Dayton, OH
1941 Louisville, KY: *Charles J. Fox, Boston, MA
1942 Buffalo, NY: *John R. Lindsay, Louisville, KY
1943 Pittsburgh, PA: *David V. Addy, Detroit, MI

*Deceased
1944 Cleveland, OH: *Joseph M. Cunningham, New York, NY
1945 No Conference: *A.E. Fuller, Miami, FL
1946 Richmond, VA: *Rollin E. Agard, Kansas City, MO
1947 New York, NY: *Joseph M. Lowery, Los Angeles County, CA
1948 Denver, CO: *C.L. Beazley, Province of Nova Scotia
1949 Detroit, MI: *Joseph F. Clark, Wildwood, NJ
1950 Montreal, QB: *Lionel G. Ott, New Orleans, LA
1951 Dallas, TX: *L. Roberge, Montreal, QB
1952 Boston, MA: *E. Lynn Crossley, Dallas, TX
1953 Miami, FL: *John McQuilken, San Diego, CA
1954 San Francisco, CA: *Frank R. Hanrahan, Cleveland, OH
1955 New Orleans, LA: *A.A. Weinberg, Chicago, IL
1956 Washington, DC: *Charles L. Mathews, Atlanta, GA
1957 St. Paul, MN: *George N. Shaw, Miami, FL
1958 Milwaukee, WI: *James H. Lowther, Ottawa, ON
1959 Montreal, QB: *Eugene A. Mintkeski, Port Authority of NY
1961 Seattle, WA: *Fred W. Lawrence, San Diego, CA
1962 Boston, MA: *John L. Williams, Phoenix, AZ
1963 Detroit, MI: *Robert E. Develle, New Orleans, LA
1964 Dallas, TX: *Leland M. Romkey, Halifax, NS
1965 Philadelphia, PA: *C.F. Craig, Dallas, TX
1966 San Diego, CA: *Fred L. Schneider, Columbus, OH
1967 Chicago, IL: *Louis G. Basso, Wayne County, MI
1968 New Orleans, LA: *Nathan J. Sindelar, Moraga, CA
1969 Toronto, ON: *Otto H. Loser, Chicago, IL
1970 Miami Beach, FL: *Joe E. Torrence, Nashville & Davidson County, TN
1971 New York, NY: *John H. Poelker, St. Louis, MO
1972 Denver, CO: *Elmer A. Johnson, Denver, CO
1973 Kansas City, MO: *John M. Urie, Kansas City, MO
1974 Las Vegas, NV: *S. Grady Fullerton, Harris County, TX
1975 Montreal, QB: Alfred D. Bricker, Wayne County, MI
1977 Atlanta, GA: *Charles L. Davis, Atlanta, GA
1978 Houston, TX: Clark Burrus, Chicago, IL
1979 Detroit, MI: *Carl V. Husby, Jr., Long Beach, CA
1980 Phoenix, AZ: *Fernand Denis, Montreal, QB
1981 Boston, MA: William J. Reynolds, Greenwich, CT

*Deceased
Past Annual Conferences and Past Presidents

1982 New Orleans, LA: *Jim C. Kirkland, Tallahassee, FL
1983 Toronto, ON: Carl L. White, San Antonio, TX
1984 San Antonio, TX: *Arthur A. Blumenfeld, Albuquerque, NM
1985 Chicago, IL: *John T. Walsh, Hartford, CT
1986 Los Angeles, CA: Betty Jo Harker, Ames, IA
1987 Washington, DC: Patrick C. Gilsson, Atlanta, GA
1988 Atlanta, GA: *Frank L. Greathouse, Nashville, TN
1989 Seattle, WA: Virginia Rutledge, Ludlow, MA
1990 Cincinnati, OH: Gary R. Norstrem, Saint Paul, MN
1991 Denver, CO: Richard B. Dixon, Los Angeles, CA
1992 Orlando, FL: *John L. Pickard, Toronto, ON
1993 Vancouver, BC: Arnold G. Holz, Washington, DC
1994 Minneapolis, MN: Bonnie Ridley Kraft, Gresham, OR
1995 Baltimore, MD: Timothy H. Riordan, Dayton, OH
1996 Portland, OR: Arthur R. Lynch, Glendale, AZ
1997 Fort Lauderdale, FL: Linda R. Savitsky, State of Connecticut, Hartford, CT
1998 San Francisco, CA: Douglas R. Ellsworth, Mount Prospect, IL
1999 Nashville, TN: Gary H. Bruebaker, State of Oregon
2000 Chicago, IL: Anne Spray Kinney, Milwaukee Metropolitan Sewerage District, WI
2001 Philadelphia, PA: Timothy Grewe, City of Portland, OR
2002 Denver, CO: William Patrick Pate, High Point, NC
2003 New York, NY: Edward Harrington, City and County of San Francisco, CA
2004 Milwaukee, WI: Nancy Zielke, University of Missouri, Kansas City, MO
2005 San Antonio, TX: Carla Sledge, Wayne County, MI
2006 Montréal, QC: Thomas Glaser, County of Cook, IL
2007 Anaheim, CA: Charles Cox, Farmers Branch, TX
2008 Fort Lauderdale, FL: Kenneth L. Rust, City of Portland, OR
2009 Seattle, WA: Paul A. Macklem, City of Kelowna, BC
2010 Atlanta, GA: Len Brittain, City of Toronto, ON
2011 San Antonio, TX: Linda C. Davidson, City of Boca Raton, FL
2012 Chicago, IL: Christopher P. Morrill, City of Roanoke, VA
2013 San Francisco, CA: Timothy L. Firestine, Montgomery County, Rockville, MD
2014 Minneapolis, MN: Robert W. Eichem, Chief Financial Officer, City of Boulder, CO

*Deceased
1. Philadelphia Marriott Downtown
1201 Market Street
Phone: 215-625-2900
Fax: 225-625-6000

2. Courtyard by Marriott Philadelphia Downtown
211 N. Juniper Street
Phone: 215-496-3200
Fax: 215-496-3696

3. Doubletree by Hilton Hotel Philadelphia Center City
Broad Street at Locust Street
Phone: 215-893-1600
Fax: 215-893-1663

4. Embassy Suites Philadelphia Center City
1776 Benjamin Franklin Parkway
Phone: 215-561-1776
Fax: 215-963-0122

5. Four Points by Sheraton Philadelphia Center City
1201 Race Street
Phone: 215-496-2700
Fax: 215-496-2715

6. Hampton Inn Philadelphia Center City
1301 Race Street
Phone: 215-665-9100
Fax: 215-665-9200

7. Hilton Garden Inn Philadelphia Center City
1300 Arch Street
Phone: 215-923-0100
Fax: 215-925-0800

8. Holiday Inn Express Philadelphia Midtown
1305 Walnut Street
Phone: 215-735-9300
Fax: 215-732-2682

9. Home 2 Suites by Hilton Philadelphia Center City
1200 Arch Street
Phone: 215-627-1850
Fax: 267-928-3750

10. Le Meridien Philadelphia
1421 Arch Street
Phone: 215-422-8200
Fax: 215-422-8225

11. Loews Philadelphia Hotel
1200 Market Street
Phone: 215-627-1200
Fax: 215-231-7305

12. Radisson Blu Warwick Hotel
220 South 17th Street
Phone: 215-735-6000
Fax: 215-790-7766

13. Sheraton Philadelphia Downtown
201 North 17th Street
Phone: 215-448-2000
Fax: 215-448-2730

14. Sofitel Philadelphia
120 South 17th Street
Phone: 215-569-8300
Fax: 215-564-7453

15. Sonesta Hotel Philadelphia
1800 Market Street
Phone: 215-561-7500
Fax: 215-561-4484

16. Wyndham Philadelphia Historic District
400 Arch Street
Phone: 215-923-8660
Fax: 215-923-4633

17. Hotel Monaco
433 Chestnut Street
Phone: 215-925-2111
Fax: 215-625-3667

18. Hotel Palomar
117 South 17th Street
Phone: 215-563-5006
Fax: 215-563-5007

19. Hotel Windsor
1700 Benjamin Franklin Parkway
Phone: 215-781-5678
Fax: 215-781-5609
<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SUNDAY – MAY 31, 2015</strong></td>
<td></td>
</tr>
<tr>
<td>9:00 a.m. – 5:00 p.m.</td>
<td>Registration-Open</td>
</tr>
<tr>
<td>10:00 a.m. – 5:15 p.m.</td>
<td>Exhibits-Open</td>
</tr>
<tr>
<td>1:30 p.m. – 2:30 p.m.</td>
<td>Concurrent Sessions – 1 CPE Credit each</td>
</tr>
<tr>
<td>2:40 p.m. – 3:30 p.m.</td>
<td>Plan and Simple: The GFOA’s Small Government Financial Reporting Program</td>
</tr>
<tr>
<td>5:30 p.m. – 6:30 p.m.</td>
<td>Getting it Right: Implementing the OM&amp;I’s New “Super Circle”</td>
</tr>
<tr>
<td>6:00 p.m. – 8:00 p.m.</td>
<td>GFOA Welcome Reception – The Frankfurt Institute</td>
</tr>
<tr>
<td><strong>MONDAY – JUNE 1, 2015</strong></td>
<td></td>
</tr>
<tr>
<td>8:00 a.m. – 4:00 p.m.</td>
<td>Concurrent Sessions – 2 CPE Credits each</td>
</tr>
<tr>
<td>10:30 a.m. – 11:10 a.m.</td>
<td>The Accounting and Auditing Year in Review</td>
</tr>
<tr>
<td>12:10 p.m. – 1:10 p.m.</td>
<td>Lunch with your Colleagues (Delegate only)</td>
</tr>
<tr>
<td>1:30 p.m. – 2:20 p.m.</td>
<td>Concurrent Sessions – 1 CPE Credit each</td>
</tr>
<tr>
<td>8:30 a.m. – 10:10 a.m.</td>
<td>General Session – Keynote Speaker: John C. Bogle (2 CPE Credits)</td>
</tr>
<tr>
<td>10:30 a.m. – 11:10 a.m.</td>
<td>Concurrent Sessions – 2 CPE Credits each</td>
</tr>
<tr>
<td>2:40 p.m. – 3:30 p.m.</td>
<td>Concurrent Sessions – 1 CPE Credit each</td>
</tr>
<tr>
<td>8:30 a.m. – 12:00 p.m.</td>
<td>Make a Difference: Avoiding Common Financial Reporting Deficiencies</td>
</tr>
<tr>
<td>4:15 p.m. – 5:30 p.m.</td>
<td>Concurrent Sessions – 1 CPE Credit each</td>
</tr>
<tr>
<td><strong>TUESDAY – JUNE 2, 2015</strong></td>
<td></td>
</tr>
<tr>
<td>9:30 a.m. – 11:40 a.m.</td>
<td>Concurrent Sessions – 2 CPE Credits each</td>
</tr>
<tr>
<td>10:30 a.m. – 11:30 a.m.</td>
<td>Annual Business Luncheon (Delegate only)</td>
</tr>
<tr>
<td>2:00 p.m. – 3:15 p.m.</td>
<td>Concurrent Sessions – 1 CPE Credit each</td>
</tr>
<tr>
<td>3:35 p.m. – 4:50 p.m.</td>
<td>Concurrent Sessions – 1 CPE Credit each</td>
</tr>
<tr>
<td>7:00 p.m. – 10:30 p.m.</td>
<td>Closing Reception (Ticketed event)</td>
</tr>
<tr>
<td><strong>WEDNESDAY – JUNE 3, 2015</strong></td>
<td></td>
</tr>
<tr>
<td>8:00 a.m. – 12:00 p.m.</td>
<td>Registration-Open</td>
</tr>
<tr>
<td>8:30 a.m. – 10:10 a.m.</td>
<td>Concurrent Sessions – 2 CPE Credits each</td>
</tr>
<tr>
<td>10:30 a.m. – 12:10 p.m.</td>
<td>Concurrent Sessions – 2 CPE Credits each</td>
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</tbody>
</table>

* Please RSVP in advance to www.gfoa.org/rsvp
Registration details will be available in late fall.

110th Annual Conference
Metro Toronto Convention Centre
Toronto, Ontario
May 22–25, 2016

111th Annual Conference
Colorado Convention Center
Denver, Colorado • May 21–24, 2017

112th Annual Conference
America’s Center Convention Complex
St. Louis, Missouri • May 6–9, 2018

113th Annual Conference
Los Angeles Convention Center
Los Angeles, California • May 19–22, 2019

Registration will open in late fall. www.gfoa.org

SAVE THE DATE

Government Finance Officers Association
203 North LaSalle Street, Suite 2700
Chicago, Illinois 60601-1210
phone 312-977-9700 | fax 312-977-4806
www.gfoa.org