



Government Finance Officers Association



GROUP-LIVE  
COURSE

# GFOA Skills Building Workshop – Budget Development

**NEW!**

March 19 – 21, 2019

The seminar will be held at GFOA's offices:  
203 N. LaSalle Street, Suite 2700, Chicago, IL 60601

**LEVEL:** Intermediate

**CPE CREDITS:** 24

**FIELD OF STUDY:** Finance

**PREREQUISITE:** Experience with local government budget process

## Who Will Benefit:

This training session is designed for experienced budget officers and budget analysts looking to improve technical skills of how to budget for various costs and revenues common to local government.

## Program Overview:

*GFOA Skills Building Workshop – Budget Development* is a three-day workshop that will walk participants through a typical budget development process, operating and capital, focusing on best practices and practical guides for how to address common challenges in budgeting. Specific focus will be on technical competencies of budgeting and how to apply skills and lessons learned while also incorporating GFOA best practices.

Starting with creating the timeline and budget calendar, this class walks through all the major steps to the budget including — budgeting for personnel costs, forecasting revenues, comparing financial data to other communities, the interaction between the operating and capital budgets, the “do’s and don’ts” of balancing the budget and taking the budget to the elected board for approval.

While many of these components are covered in other GFOA sessions, this one focuses more on the technical aspects of the process as the content will provide a deeper dive in these areas than other courses.

## Seminar Objectives:

Those completing this seminar will be able to:

- Build technical skills and a practical approach for addressing common budget challenges
- Identify strategies for effective personnel budgeting
- Learn to accurately estimate costs for capital projects and correlate them with operating costs
- Identify pitfalls (and opportunities) for benchmarking
- Become familiar with nuances of revenue projections and forecasting
- Understand how to identify and apply budget balancing strategies
- Learn to avoid budget gimmicks and common pitfalls that move organizations away from achieving its long-term objectives

## Instructors:

**Craig Lesner**, Senior Manager, GFOA, Chicago, Illinois

**Katie Ludwig**, Senior Manager, GFOA, Chicago, Illinois

**Shayne Kavanagh**, Senior Manager — Research, GFOA, Chicago, Illinois

**For further study, to learn more, and to register for this seminar and other GFOA training events, visit [www.gfoa.org](http://www.gfoa.org)**

# GFOA Skills Building Workshop – Budget Development

March 19-21, 2019



GROUP-LIVE COURSE

## Program Schedule

**Tuesday through Thursday:** Attendee check-in and distribution of course materials will take place from 8:00 am – 8:30 am on Tuesday. The seminar hours will be 8:30 am – 4:30 pm (Central)

## Program Location

The seminar will be held at GFOA's offices: 203 N. LaSalle Street, Suite 2700, Chicago, IL 60601.

## It's Easy to Get Here

GFOA's offices are located at the northeast corner of LaSalle and Lake Streets in downtown Chicago. Chicago Transit Authority (CTA) trains can be taken directly to the office from either of Chicago's airports. The Orange Line between Midway International Airport and downtown is \$2.25 per ride; the Blue Line from O'Hare International Airport to downtown is \$5.00 (and the train back to O'Hare is \$2.25). Our office building is right next to the CTA station at Clark and Lake. InterPark garage is located inside the building.

## Hotel Information

Hyatt Place Chicago River North, 66 West Illinois Street, Chicago, IL 60654

- Complimentary continental breakfast is available at the hotel.
- Room Rate: \$131 Single/Double plus 17.4% tax
- Based on availability, GFOA's group rate (GFOA Skills Building Workshop – Budget Development) is valid until February 15, 2019. Should the GFOA block fill up or if reservations are made after this date, reservations will be accepted on an overall hotel space availability and may not qualify for the GFOA discounted rate.

**Please print or type**  Check here if you are faxing this form.

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

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

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

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

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

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

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

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

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

GFOA Membership # (if available) \_\_\_\_\_

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

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

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

Please photocopy this form for additional registrants.

## Registration Fees

Fee includes handout materials, continental breakfast, and lunch.

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

(Please Check One)

Active/Associate GFOA Member: \$900  Non-Member: \$1,200

Registration Fee \$ \_\_\_\_\_

New member fee: Visit [www.gfoa.org](http://www.gfoa.org) \$ \_\_\_\_\_  
or call GFOA at 312-977-9700 for fee

Discount for paid new member (\$25) \$ \_\_\_\_\_

**TOTAL \$ \_\_\_\_\_**

## Payment Information (Please Check One)

Fees must be paid in U.S. dollars by check, credit card, or purchase order. **Please do not submit duplicate copies of this form.**

### Payment by Check:

Make check payable to "Government Finance Officers Association"  
Send to: GFOA • 203 N. LaSalle St. • Suite 2700 • Chicago, IL 60601-1210

Payment by credit card: scan and e-mail this form to [training@gfoa.org](mailto:training@gfoa.org);  
fax: 312-977-4806; or send to:

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### Bill Me:

(Scan and e-mail this form to [training@gfoa.org](mailto:training@gfoa.org) or fax to 312-977-4806.  
If selecting this option, you must include a purchase order number.  
Payment must be received for all registrations prior to the event date.)

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

GFOA Tax ID Number: 36-2167796

**Cancellation Policy:** Cancellations can be faxed to the GFOA at 312-977-4806 or e-mailed to [training@gfoa.org](mailto:training@gfoa.org). Requests for refunds received prior to March 1, 2019, will incur a \$50 administrative service charge. Requests for refunds received between March 1, 2019, and March 15, 2019, will be refunded 50 percent of the registration fees. No refunds will be granted after March 15, 2019.

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

**Inquiries:** For information regarding administrative policies such as complaints and refunds, please contact GFOA at [training@gfoa.org](mailto:training@gfoa.org) or at 312-977-9700.

## Connect with GFOA

Government Finance Officers Association (GFOA) | GFOA Members Forum

@GFOA (#GFOA and #GFOA2019) | @GFOAJobs | @chrisgfoa

GFOA of the US & Canada | GFOA Members Group

**Government Finance Officers Association**  
203 North LaSalle Street, Suite 2700  
Chicago, Illinois 60601-1210  
312-977-9700 | fax 312-977-4806 | [www.gfoa.org](http://www.gfoa.org)

A copy of the confirmation will be sent as a PDF attachment via e-mail from [training@gfoa.org](mailto:training@gfoa.org). Please add this address to your allowed senders list.

**CPE Credits:** GFOA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).

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