



Government Finance Officers Association

GROUP
INTERNET-BASED
COURSE

Developing Effective Financial Policies

September 27, 2017 | 2:00pm to 4:00pm EDT

NEW!

LEVEL: Basic

CPE CREDITS: 2 (based on a 50-minute hour)

FIELD OF STUDY: Finance

PREREQUISITE: None.

Who Will Benefit:

This training is intended for finance officers who have input in developing and reviewing their government's financial policies.

Program Description:

Governing bodies and executive management use financial policies to set the baseline standards for how an organization will be managed financially. In this training session, participants will learn a step-by-step approach to developing and implementing financial policies, across all areas of financial management, including general fund reserves, operating budget, debt management, investments, economic development, and more. Speakers will address the need to create policies that are flexible enough so they won't need to be re-invented due to recurring issues, but are also specific enough to provide proper guidance and controls on the decisions that governments can take. Additionally, speakers will cover how they have used financial policies to help promote long-term, strategic thinking and manage financial risks in their own organizations.

Seminar Objectives:

Those completing this seminar will be able to:

- Understand financial policies for a range of administrative functions
- Define the problem the policy will address
- Draft policies, remaining aware of legal requirements, and consider public comments and the experiences of peer governments
- Review and present policies to government officials
- Formally consider and adopt policies
- Design effective policies that have a number of design features in common
- Express policies in a manner that is understandable to the intended audiences
- Address all relevant issues and risks for specific policy in a concise fashion
- Monitor, review, and update policies as needed in a systematic way
- Analyze the reasons if specific policies are not being followed

Recommended GFOA Reading:

[Adopting Financial Policies](#)

Instructors:

Please check www.gfoa.org for a faculty listing of GFOA staff and/or practitioners as it becomes available.

It's Easy to Participate

- GFOA's Internet training is delivered to attendees via a secure website and audio conferencing service.

Equipment Needed

- A computer with a Web browser to view the presentation. If you have speakers for your computer, you will be able to listen to the training using them.
- If you do not have speakers for your computer, you will need a phone to listen to the presentation. (Speaker phone recommended, but not required.)

How It Works

- Participants will receive an e-mail invitation containing a link with instructions at the beginning of the week the course will be taking place from the e-mail address **messenger@webex.com**. (Please add this e-mail address to your "allowed senders list.")
- Materials can be viewed on a secure Internet site.
- Questions can be asked at any time during the course, and interactive exercises will test your mastery of the material.
- To join the event more quickly, you can set up Event Manager before the event starts. Go to: <https://gfoa.webex.com/gfoa/ecsetup.php?frommail=1>.

To learn more or register for this event, visit www.gfoa.org

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Please print or type (or register online at www.gfoa.org)

Check here if you are faxing this form or scanning and e-mailing this form to training@gfoa.org. Fax: 312-977-4806.
If faxing, do not mail the original.

Name: _____
Title: _____
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 Check box to indicate if you are substituting for an active member.
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Please photocopy this form for additional registrants.

A copy of the confirmation and invoice will be sent as a PDF attachment via e-mail from training@gfoa.org. Please add this address to your allowed senders list.

Registration fee is per person, not per group. Early and/or student registration discounts do not apply to Internet training.

Register and pay for 3-9 participants and receive 10 percent off the total cost of the registrations. Register and pay for 10 or more participants and receive 15 percent off the total cost of the registrations. To qualify for the group discount, registrations must be submitted together. Individual registrations submitted separately or after the original group is submitted will not qualify for the group discounts.

Cancellation requests must be made in writing to GFOA. All cancellations received five business days before the event date will incur a \$20 administrative fee. No refunds will be issued after that date.

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 his/her place at the member rate. You must provide the member number and/or name of the GFOA member on the registration form.

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

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.



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Registration Fees (Please Check One)

Member Price: \$85 Non-Member Price: \$160

Registration Fee	\$ _____
Group Discount	\$ _____
New member fee: Visit www.gfoa.org	\$ _____
or call GFOA at 312-977-9700 for fee	
Discount for paid new member (\$25.00)	\$ _____
REGISTRATION 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.

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Make check payable to "Government Finance Officers Association"
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