IMPORTANT NOTICE: The Government Finance Officers Association (GFOA) or its agents will be taking photographs and/or video during the conference, including, without limitation, during the general session and other meetings and sessions. By attending the event, you acknowledge and agree that the Government Finance Officers Association (GFOA) or its agents may take photographs and/or video of you during the event and may use those photographs and recordings for GFOA’s purposes, including but not limited to news, marketing, advertising, publicity and fundraising purposes, without compensation to, or further permission from, you. All such photos and videos are the sole property of GFOA.
# Table of Contents

## General Information
- Welcome Letters .................................................... 2
- General Conference Information ............................... 5

## Program
- Preconference Seminars ........................................... 17
- Saturday, May 18 ...................................................... 18
- Sunday, May 19 ......................................................... 19
- Monday, May 20 ......................................................... 29
- Tuesday, May 21 ......................................................... 48
- Wednesday, May 22 ................................................... 63

## Exhibitors ................................................................. 71

## Sponsors ................................................................. 77

## GFOA
- Awards for Excellence Winners ............................... 79
- GFOA First Annual Hero Award ............................... 80
- Scholarship Recipients ............................................. 81
- GFOA’s 20,000th Member ........................................... 82
- Local Conference Committee ................................. 83
- About GFOA .......................................................... 83
- GFOA Executive Board ............................................. 86
- GFOA Staff ............................................................ 88
- Past Annual Conferences and Past Presidents ........ 90
- Hotels ................................................................. 93
May 2019

Dear Friends,

On behalf of the City of Los Angeles, it is my pleasure to welcome you to the Government Finance Officers Association 2019 Annual Conference.

Los Angeles is open for business — a city where the world comes to innovate and create. The City of Angels is proud to host this gathering of public finance professionals as you come together to share ideas, discuss best practices, and foster new relationships.

I hope you experience all that our great city has to offer, and I send my best wishes for a memorable conference and future success.

Sincerely,

ERIC GARCETTI
Mayor

Eric Garcetti
Mayor, City of Los Angeles, CA
May 19, 2019

Dear Friends,

It is my pleasure to welcome you to the 2019 Annual Conference, hosted by the Government Finance Officers Association.

L.A. County is proud to host this gathering of public finance professionals from throughout the U.S. and Canada to share ideas, sharpen skills, discover innovative tools and technologies and foster new relationships while strengthening existing ones.

The pulse of our region and the heart of our culture beats in 224 languages so all who visit may truly feel at home. L.A. County features world-class hotels, acclaimed dining, historic landmarks, renowned museums, celebrated attractions, and unending recreational opportunities stretching from our golden beaches to our picturesque mountains. Los Angeles is the perfect setting to welcome the Government Finance Officers Association, to connect individually and build collectively.

It gives me great pleasure to congratulate everyone who took part in organizing this event. I send you all my best wishes for a memorable conference and continued success.

Enjoy this wonderful evening.

Sincerely,

JANICE HAHN
Chair of the Board of Supervisors
County of Los Angeles

Janice Hahn
Chair, Board of Supervisors, County of Los Angeles, CA
On behalf of Californians, I am pleased to welcome you to Los Angeles for the 113th Annual Conference of the Government Finance Officers Association.

Los Angeles is a world-renowned, vibrant and diverse city which is proud to host visitors from all over the world. The Los Angeles region offers a wide array of natural and man-made landmarks throughout and the city boasts many unique neighborhoods, restaurants, and distinguished art and cultural institutions. We hope you will have an opportunity to enjoy these features during your stay.

We thank you for your commitment to your professional development and enhancing the financial management of governments for the public benefit.

I send my best wishes for a productive gathering.

Sincerely,

Gavin Newsom
Governor of California
**REGISTRATION HOURS**

Attendee check-in and registration will take place in the South Lobby during the following hours. All attendees and their guests must check in to pick up their conference materials.

- Saturday, May 18: 11:00 a.m. – 5:00 p.m.
- Sunday, May 19: 8:00 a.m. – 4:00 p.m.
- Monday, May 20: 8:00 a.m. – 4:00 p.m.
- Tuesday, May 21: 8:00 a.m. – 4:00 p.m.
- Wednesday, May 22: 8:00 a.m. – 11:00 a.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 in the South Lobby of the convention center.

**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 Breakfast.

**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 Breakfast 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 ANNUAL CONFERENCE ATTENDEE SCHOLARSHIP RECIPIENTS:** Thank you to the almost 600 delegates for taking advantage of GFOA’s first-time annual conference attendee scholarship. We hope that you will find your conference experience beneficial as you catch up on recent changes, learn new developments, and network with your peers.

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

**FINANCIAL FOUNDATIONS FRAMEWORK:** GFOA’s Financial Foundations Framework helps facilitate
collaboration and support for public policies and programs. Organized into five pillars, the Framework shows you how to improve your financial position now and create a strong foundation for a thriving community over the long term. Visit the GFOA Financial Foundations Exhibit in the South Lobby to connect with GFOA staff and finance officers currently implementing the recommendations, learn more about the project, and identify how you can connect with other governments interested in joining the effort.

**MEMBER FEEDBACK/INTERVIEWS:** Throughout the conference, GFOA staff will be scheduling short interviews with GFOA members to better understand your preferences and what you want out of your GFOA membership. For more information or to request to be included in our interviews, please contact research@gfoa.org. If you already have an appointment or would like to just stop by and share an idea or comment, please visit us in room 305.

**MEDICAL ASSISTANCE:** Beige house phones are scattered throughout the venue. To reach building security, dial 3000 for emergency or dial (213) 765-4605 for non-emergency situations.

**ACCOMMODATIONS FOR MOTHERS:** The Los Angeles Convention Center has two rooms for nursing mothers located in the First Aid office in the South Lobby (main level by Pico Street entrance) and in the West Lobby (outside Hall A – across from Petree C). Please see the EMT for access.

**VISITOR INFORMATION CENTER**

Stop by the Discover Los Angeles Information Booth for restaurant reservations and city information. The desk is located in the South Lobby of the convention center. It will be open the same hours as GFOA Registration:

- Saturday, May 18: 11:00 a.m. – 5:00 p.m.
- Sunday, May 19: 8:00 a.m. – 4:00 p.m.
- Monday, May 20: 8:00 a.m. – 4:00 p.m.
- Tuesday, May 21: 8:00 a.m. – 4:00 p.m.
- Wednesday, May 22: 8:00 a.m. – 11:00 a.m.
TOURS

GFOA has partnered with StarLine Tours to offer sightseeing excursions and guided tours. All tours will depart from the Los Angeles Convention Center. For more information on the offerings and to purchase tickets onsite, go to the Tours Desk in the South Lobby. Space is limited.

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.

CONTINUING PROFESSIONAL EDUCATION (CPE) CREDITS

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. (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.)

Did you miss getting scanned for a session? Please resolve it the SAME DAY by visiting GFOA's Message Center in the South Lobby. Scanning for missed sessions on multiple days will not be allowed.
A printed record of your scanned CPE credits will be mailed to you 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.

**EVALUATIONS**

Throughout the conference, GFOA asks attendees to provide feedback on concurrent sessions and the conference as a whole. Evaluation forms can be found on GFOA’s website at [www.gfoa.org/conf-eval](http://www.gfoa.org/conf-eval). Evaluations can also be filled out on the computers in the **Cyber Café located in the South Lobby** or through GFOA’s mobile app. Your feedback is important to GFOA and will assist us with making improvements to future conferences.

**FOOD AND BEVERAGE**

**BREAKFAST**

**SUNDAY, MAY 19**
Welcome Breakfast. See page 20.

**MONDAY, MAY 20 AND TUESDAY, MAY 21**
Breakfast bites will be provided before the general session near Hall G.

**WEDNESDAY, MAY 22**
Breakfast bites will be provided in the South Lobby.

**COFFEE**

**SUNDAY, MAY 19**
Coffee for Welcome Breakfast Sponsor: **Discover Los Angeles**

**MONDAY, MAY 20 AND TUESDAY, MAY 21**
Coffee will be available before the general session near Hall G.
*Monday Sponsor: Workiva*
*Tuesday Sponsor: MUFG Union Bank, N.A.*

**WEDNESDAY, MAY 22**
Coffee will be available near registration in the South Lobby.
*Sponsor: GFOA*
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—please make sure your badge is accessible. This is a great opportunity to network with fellow attendees. General seating is available. We ask that you please do not save seats or tables. Dessert will be available in the Exhibit Hall, Hall K.

MONDAY, MAY 20, DELEGATE LUNCHEON
12:10 p.m. – 1:30 p.m., Hall HJ

TUESDAY, MAY 21, DELEGATE LUNCHEON
12:15 p.m. – 1:30 p.m., Hall HJ

SNACKS
Enjoy afternoon snacks on Sunday, Monday, and Tuesday. Displays will be set up outside session rooms throughout the convention center.

SUNDAY, MAY 19
Sponsor: AXA

MONDAY, MAY 20
Sponsor: Tyler Technologies

TUESDAY, MAY 21
Sponsor: Workiva

EXHIBIT HALL
This year, we have the largest exhibit hall in GFOA’s 113-year history. Exhibits are located in Hall K. 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.

RIBBON CUTTING
Sunday, May 19
10:00 a.m.
Festivities will include a ribbon cutting and Starbucks gift cards to the first 113 delegates in line for the hall’s opening (prizes exclude guests and children).
GENERAL CONFERENCE INFORMATION

EXHIBIT HOURS
Sunday, May 19  10:00 a.m. – 1:30 p.m.
Monday, May 20  11:00 a.m. – 4:30 p.m.
Tuesday, May 21  10:00 a.m. – 2:00 p.m.

GFOA Products and Services
(South Lobby)
Check out all that GFOA has to offer!
Thank you for your continued membership in GFOA.

- We are more than 20,300+ members strong and growing!
- GFOA technical staff will be on hand to answer practical questions on issues related to accounting, financial reporting, and budget presentation, as well as how to participate or become a reviewer in one of GFOA’s professional recognition programs.
- Members of GFOA’s Research and Consulting will be available to discuss consulting opportunities, research projects, training events, GFOA best practices, and more.

We look forward to meeting you!

New Orleans – Host City, 2020 Annual Conference
(Booth #641)
We’re excited to see you in New Orleans for GFOA’s 114th Annual Conference, May 17–20, 2020, at the Ernest N. Morial Convention Center! From world-famous restaurants to hidden music clubs, New Orleans has something to discover at every turn. Follow your instincts, your rhythm, your flavor and fun to discover the heart, soul and spirit of the city. Follow Your NOLA. For more information, visit www.neworleanscvb.com.

2020 CALL FOR TOPICS: The call for session topics is now open for GFOA’s 114th Annual Conference. Go to www.gfoa.org/call-for-topics to access the submission form.
Passport booklet drawing
A passport booklet can be found inside your conference bag. We encourage you to use it as you walk through the exhibit hall for a chance to win prizes.

Prizes include:

- HP laptop (2 winners)
- Amazon Echo Dot (3 winners)
- LG Wireless Stereo Headset (3 winners)
- Backpack containing a voucher worth $250 in GFOA gear and publications (4 winners)

The winners will be announced on GFOA’s social media accounts and the social media wall, which is located in the South Lobby, late afternoon on Tuesday, May 21. Only one winner per prize. GFOA will contact the winners to award the prizes onsite. Exhibitors and guests are not eligible.

MESSAGE CENTER
Incoming messages for conference attendees will be posted on screens in the Message Center, which is located in the South Lobby during conference registration hours. Messages may be left for attendees by calling 213-743-6224.

CONFERENCE APPAREL: Stop by the GFOA Message Center in the South Lobby 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, on GFOA’s Twitter account (@GFOA), and at gfoa.org/now.

NO SMOKING POLICY: Smoking is not permitted anywhere in the convention center.
STEPS CHALLENGE
Let’s have some fun over these next few days while promoting wellness! GFOA is holding a Steps Challenge over Sunday, Monday, and Tuesday. Those who hit 10,000 steps each day will be entered to win a prize. Go to gfoa.org/steps for instructions on how to sign up and connect your fitness tracker using mobile or a computer browser—whatever is most convenient for you! No fitness tracker? No problem! Follow the instructions on the page about how to connect your smartphone to track your steps for the Challenge. Daily leaderboards will be posted to GFOA’s social media accounts and website.

PRIZES
Each day a VISA, AMEX, and Mastercard gift card will be awarded to three random participants who hit 10,000 steps.

The challenge will run until 11:59 p.m. on Sunday, Monday, and Tuesday. Winners will be announced the following day on GFOA’s social media accounts. GFOA will contact the winners to award the prizes onsite. Exhibitors and guests are not eligible.

GFOA SHUTTLE SERVICE
GFOA will provide roundtrip courtesy shuttles between the Los Angeles Convention Center (LACC) and the following hotels. See page 13 for the schedule.

HOTELS WITHIN WALKING DISTANCE TO THE L.A. CONVENTION CENTER AND THE MICROSOFT THEATER
• Courtyard L.A. Live
• Hotel Figueroa
• Hotel Indigo
• JW Marriott Los Angeles L.A. Live
• Luxe City Center
• Residence Inn L.A. Live.
## SHUTTLE SCHEDULE

<table>
<thead>
<tr>
<th>DATE</th>
<th>INTERVAL</th>
<th>HOURS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saturday, May 18</td>
<td>30 minutes</td>
<td>7:30 am–11:30 am</td>
</tr>
<tr>
<td></td>
<td>30 minutes</td>
<td>1:30 pm–5:30 pm</td>
</tr>
<tr>
<td>Sunday, May 19</td>
<td>20 minutes</td>
<td>7:30 am–12:00 pm</td>
</tr>
<tr>
<td></td>
<td>30 minutes</td>
<td>12:00 pm–4:00 pm</td>
</tr>
<tr>
<td></td>
<td>20 minutes</td>
<td>4:00 pm–6:00 pm</td>
</tr>
<tr>
<td>Monday, May 20</td>
<td>20 minutes</td>
<td>8:00 am–12:00 pm</td>
</tr>
<tr>
<td></td>
<td>30 minutes</td>
<td>12:00 pm–4:00 pm</td>
</tr>
<tr>
<td></td>
<td>20 minutes</td>
<td>4:00 pm–6:00 pm</td>
</tr>
<tr>
<td>Tuesday, May 21</td>
<td>20 minutes</td>
<td>8:00 am–12:00 pm</td>
</tr>
<tr>
<td></td>
<td>30 minutes</td>
<td>12:00 pm–6:30 pm</td>
</tr>
<tr>
<td>Closing Event, May 21</td>
<td>Continuous*</td>
<td>6:30 pm–10:30 pm</td>
</tr>
<tr>
<td>Wednesday, May 22</td>
<td>30 minutes</td>
<td>8:00 am–12:30 pm</td>
</tr>
</tbody>
</table>

## HOTEL

<table>
<thead>
<tr>
<th>HOTEL</th>
<th>ROUTE</th>
<th>BOARDING</th>
</tr>
</thead>
<tbody>
<tr>
<td>The L.A. Grand</td>
<td>1</td>
<td>Walk to Westin Bonaventure; Figueroa St.</td>
</tr>
<tr>
<td>Sheraton Grand Los Angeles</td>
<td>1</td>
<td>On Hope St. near entrance</td>
</tr>
<tr>
<td>The Standard</td>
<td>1</td>
<td>Across S. Flower St.</td>
</tr>
<tr>
<td>Westin Bonaventure</td>
<td>1</td>
<td>Figueroa St.</td>
</tr>
<tr>
<td>InterContinental L.A.</td>
<td>2</td>
<td>7th Street</td>
</tr>
<tr>
<td>The Freehand</td>
<td>3</td>
<td>Across 8th W. 8th St.</td>
</tr>
<tr>
<td>Millennium Biltmore</td>
<td>3</td>
<td>Across Grand Ave.</td>
</tr>
<tr>
<td>Omni L.A.</td>
<td>3</td>
<td>On Olive St.</td>
</tr>
</tbody>
</table>

*Continuous between hotels with shuttle service and The Microsoft Theater.
CELLULAR PHONES
As a courtesy to our speakers and to the other conference attendees, please turn your cell phone to vibrate or off during all conference sessions, meetings, and luncheons.

CHARGING STATIONS are available throughout the convention center.
Co-sponsors: AXA; BKD, LLP; J.P. Morgan; nCourt; and Visa

CYBER CAFÉ
Attendees will have access to computers in the South Lobby to:
• Check e-mail and have access to the GFOA website to fill out session evaluations.
• Access a list of colleagues in attendance.
• Print airline boarding passes.
Sponsor: ICMA-RC

CONNECT WITH GFOA ONLINE
Check out the Social Media Wall in the South Lobby.
Be a part of the conference discussion on GFOA’s social media sites:
- GFOA on LinkedIn | GFOA Members Forum
- @GFOA (#GFOA2019 and #GFOA) | @GFOAjobs | @chrisgfoa
- GFOA of the US & Canada | GFOA Members Group

WIRELESS CONNECTION
Free Wi-Fi is available throughout the convention center.
SSID: GFOA2019
Password: GFOA9102
Sponsor: Empower Retirement
MOBILE APP
To enhance your conference experience, download GFOA’s Annual Conference mobile app, “GFOA Conference,” from the Apple App Store for iPad and iPhone and from Google Play for Android. The GFOA 2019 mobile app allows you to view the schedule, presentations, exhibitors, and speaker details from the GFOA conference. Users can take notes adjacent to available presentation slides and draw directly on slides inside the app. Note-taking is also available in the exhibitor module. Additionally, users can share information with attendees and colleagues with in-app messaging, tweeting, and e-mailing.

THANK YOU
Government Finance Officers Association expresses sincere appreciation to the following organizations for their assistance in planning the 113th Annual Conference:

- City of Los Angeles
- County of Los Angeles
- Discover Los Angeles
- Los Angeles Local Conference Committee
SOCIAL EVENTS

WELCOME BREAKFAST
Sunday, May 19 • 8:30 a.m. – 10:00 a.m.
Los Angeles Convention Center, Hall HJ
Complimentary to conference attendees and guests

For detailed information, see page 20.

GFOA CLOSING EVENT
Tuesday, May 21 | 7:00 p.m. – 10:30 p.m.
Microsoft Theater
Dessert and Entertainment
Ticketed Event

For detailed information, see page 62.
Friday Preconference Seminars

Alliance for Excellence in School Budgeting
8:30 a.m. – 4:30 p.m., Room 410

Strategies for Professional Growth: Building Confidence and Influence
8:30 a.m. – 12:30 p.m., Room 408 B

All the Queen's Horses — Beyond the Movie
1:00 p.m. – 5:00 p.m., Room 411

Finding the Right Banking Services Fit for You
1:00 p.m. – 5:00 p.m., Room 409

It's Out There: Understanding the Financial Impacts of Cyber Security Risk
1:00 p.m. – 5:00 p.m., Room 408 B

Saturday Preconference Seminars

An Accountant, an Actuary, and an Auditor Walk into a Bar....
8:30 a.m. – 12:30 p.m., Room 408 B

Detroit: Past, Present, and Future
8:30 a.m. – 12:30 p.m., Room 409

Issuer Disclosure Practices and Investor Relations Program
8:30 a.m. – 12:30 p.m., Room 410

All the Queen's Horses — Beyond the Movie
(Encore Presentation)
1:00 p.m. – 5:00 p.m., Room 411

Doing the Right Thing when It Is Hard: Living Your Ethics in Tough Situations
1:00 p.m. – 5:00 p.m., Room 408 B
SATURDAY AT-A-GLANCE

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 404 B

Committee on Canadian Issues
9:00 a.m. – 3:30 p.m., Room 401

Committee on Economic Development and Capital Planning
9:00 a.m. – 4:30 p.m., Room 406 B

Committee on Governmental Budgeting and Fiscal Policy
9:00 a.m. – 4:00 p.m., Room 405

Committee on Governmental Debt Management
9:00 a.m. – 5:00 p.m., Room 406 A

Committee on Retirement and Benefits Administration
9:00 a.m. – 5:00 p.m., Room 404 A

Committee on Treasury and Investment Management
9:00 a.m. – 5:00 p.m., Room 407

CPFO Exams
1:30 p.m. – 5:00 p.m., Room 301 A

Special Review Executive Committee
3:00 p.m. – 5:00 p.m., Room 404 B

State/Provincial Representatives and Presidents Meeting
3:00 p.m. – 4:00 p.m. (reception to immediately follow), Room 402
Conference Registration, GFOA Products and Services Booth, and Message Center
8:00 a.m. – 4:00 p.m., South Lobby

CPFO Exams
8:30 a.m. – 12:00 p.m., Room 301 A

Welcome Breakfast
8:30 a.m. – 10:00 a.m., Hall HJ
See page 20 for details.

Exhibit Hall
10:00 a.m. – 1:30 p.m., Hall K
Festivities will include a ribbon cutting and Starbucks gift cards to the first 113 delegates in line for the hall’s opening (prizes exclude guests and children).

Women in Public Finance Networking Function*
Come network and learn more about Women in Public Finance.
11:00 a.m. – 12:00 p.m., Room 501 ABC

GFOA’s Women’s Public Finance Network Business Meeting and Luncheon*
12:00 p.m. – 1:15 p.m., Room 502
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. Space onsite cannot be guaranteed.
The luncheon presenter will be Cathie G. Eitelberg, Public Sector Market Director (retired), Segal Consulting.
Sponsor: Segal Consulting

Keynote Presentation — Charmaine Brown
1:30 p.m. – 2:20 p.m., Hall G, 1 CPE Credit, Personal Development

Concurrent Sessions 2:40 p.m. – 3:30 p.m.
Concurrent Sessions 3:50 p.m. – 5:05 p.m.

Black Caucus Business Meeting and Presentation
3:50 p.m. – 5:05 p.m., Room 411, 1 CPE Credit, Management Services
Open to all conference delegates.
Presenter: Samuel Hughes, Assistant General Manager, Economic Development, Economic & Workforce Development Department, Los Angeles, CA

*Event is only open to attendees who submitted an RSVP before the start of the annual conference.
Help kick off the start of this year’s conference by joining us for a Welcome Breakfast!

We have much to celebrate—more than 20,300+ members, almost 600 first-time attendees, record-breaking number of conference delegates, and the largest exhibit hall in GFOA history. THANK YOU!

Meet your peers over a breakfast buffet, get energized, and make connections for the days to come.

**KEYNOTE PRESENTATION**

**Charmaine Brown**

Sunday, May 19 • 1:30 p.m. – 2:20 p.m.

- Hall G  ■  1 CPE  ■  Personal Development

Charmaine Brown, a diversity and inclusion leader on the national stage, will bring a fresh perspective to the topic of Unconscious Bias and share compelling examples of how awareness can lead to transformation and better outcomes.
CONCURRENT SESSIONS 2:40 P.M. – 3:30 P.M.

Sunday, 2:40 p.m. – 3:30 p.m.

**Arresting Public Safety Costs: Ways to Prevent Police Department Personnel Costs from Taking Over the Budget**

- Room 151
- 1 CPE
- Management Services

Government budgets are driven upward by personnel costs and related benefits. Generally, one of the biggest personnel budgets belongs to the police department. However, the nature of services that police do exposes local governments to additional financial risk. While they make headlines across the country for the social impact, everything from car accidents, bias and discrimination lawsuits, employee relations issues, to excessive force cases and more can have a significant financial impact. Speakers will help discuss some of these difficult issues from the perspective of a finance officer and provide recommendations for how to limit the financial risk that is inherent within public safety.

**SPEAKERS:** Pall Guðgeirsson, City Manager (retired), San Clemente, CA; Walter Katz, Director of Professional Services, Benchmark Analytics, Chicago, IL; Larry Yium, Director of Planning and Research (retired), Houston Police Department, Houston, TX

Sunday, 2:40 p.m. – 3:30 p.m.

**Back to the Future: Update on GASB’s Reporting Model Project**

- PeTree D
- 1 CPE
- Accounting – Governmental

GASB continues to evaluate making changes to its reporting model which received its last comprehensive review in the project leading to the adoption of GASB Statement No. 34 issued in 1999. Speakers will provide an update on this important project. Attend so you can provide feedback to the GASB and comment on how these potential changes will affect your government.

**SPEAKERS:** Teresa Smith, Deputy Finance Director, City of Charlotte, NC; Diane B. Allison, CPA, CGMA, CGFO, CLSBA, Director of Business Services, Ascension Parish School Board, Donaldsonville, LA; David R. Bean, Director of Research and Technical Activities, Governmental Accounting Standards Board (GASB), Norwalk, CT
Sunday, 2:40 p.m. – 3:30 p.m.

**Big or Small: How to Effectively Engage on Social Media in the Finance World**
- Room 403 A  
- 1 CPE  
- Communications & Marketing

When engaging the public on finance and budget-related matters on social media, there isn’t a one-size-fits-all approach. What works for a large city probably doesn’t work for a small town. Similarly, different types of organizations may find they need a different approach to attract followers. At this session speakers will provide examples from a variety of organizations who use social media but adopt different approaches. Speakers will also discuss how to effectively present finance and budget-related topics to citizens and how all organizations can engage the public through video, polling, and more.

**SPEAKERS:** Timothy Martin, Senior Manager for Member Engagement, GFOA, Chicago, IL; Kent Wyatt, Communications Manager, City of Tigard, OR; Brent Sakaida, Budget Officer, City of Thousand Oaks, CA

Sunday, 2:40 p.m. – 3:30 p.m.

**GFOA Legislative and Regulatory Update**
- Room 408 A  
- 1 CPE  
- Finance

This session will highlight the recent tax reform debate and its effect on governments' ability to collect revenues and issue debt. Discussion of legislative proposals that could impact infrastructure finance and online sales tax collection will be discussed. Speakers will also highlight discussions in Washington, D.C., surrounding public pensions, rating agency requirements, and other proposals that impact a government’s comprehensive fiscal structure.

**SPEAKERS:** Emily Swenson Brock, Director of the Federal Liaison Center, GFOA, Washington, DC; Anna Van Degna, Public Finance Director, Controller’s Office of Public Finance, City & County of San Francisco, CA; Dan Huge, Public Finance Director, Indiana Finance Authority, Indianapolis, IN

Sunday, 2:40 p.m. – 3:30 p.m.

**Mass Transit and the Finance Officer**
- Room 403 B  
- 1 CPE  
- Finance

For finance officers working with a specialized mass transit agency, knowledge of the industry may be standard. Finance officers who operate transit services
as part of a larger general purpose government, coordinate their government’s services with a transit agency, or are looking to better utilize transit to serve a community, should attend this session. Speakers will provide information on the latest mass transit trends and issues; discuss financing opportunities; identify grant programs or other incentives for both transit-focused development and operations; and provide background knowledge to enhance the understanding of the current transit environment across the United States and Canada.

**SPEAKERS:** Joe Costello, Senior Vice President - Finance, Dallas Area Rapid Transit, Dallas, TX; Bob Biles, Chief Financial Officer, Utah Transit Authority, Salt Lake City, UT; Craig Hoshijima, Deputy Executive Officer: Planning for Strategic Financial Planning, LA Metro, Los Angeles, CA

Sunday, 2:40 p.m. – 3:30 p.m.

**The "AAA" Club**

- Room 150  
- 1 CPE  
- Finance

GFOA will host a networking session designed specifically for governments that have achieved an AAA rating. This session will allow delegates to discuss the unique challenges in achieving and maintaining that esteemed rating.

**SPEAKER:** Matthew Gierach, Debt Manager, City of Portland, OR; Vishal Trevedi, Financial Analyst, Office of Public Finance, City and County of San Francisco, CA; Kristin A. Hanson, Director, PFM Financial Advisors LLC, Milwaukee, WI

Sunday, 2:40 p.m. – 3:30 p.m.

**Tips from Senior CFOs**

- Room 152  
- 1 CPE  
- Personal Development

Preparing for the role of a chief financial officer is challenging; each day is different. Being flexible and learning on the job is key, and navigating how to provide technical expertise while communicating in a political environment can be difficult. This session will feature several senior CFOs who will share lessons learned from their careers. Stories will highlight case studies of successes and failures to advise on actions you should consider or avoid in your own career.

**SPEAKERS:** Jenni L. Logan, Treasurer/Chief Financial Officer, Lakota Local School District, Liberty Township, OH; David
Schmiedicke, Finance Director, City of Madison, WI; Michael Gossman, Deputy County Administrator, County of Sonoma, Santa Rosa, CA

Sunday, 2:40 p.m. – 3:30 p.m.

Understanding the Fiduciary Duty of Government Finance Officers and External Parties

Government officials have a fiduciary duty to serve the interests of their entity and protect public funds. Even when governments rely on the advice of outside professionals, that duty remains intact. External advisors such as investment advisors and municipal advisors have federally mandated fiduciary duties to put the interest of their clients (governments) ahead of their own. Other market players – such as brokers – are impacted by factors like suitability standards and some federal regulatory actions. This session will give an overview of what the parameters of fiduciary duty standards are for internal government staff as well as external professionals to help governments understand what is expected of themselves and others.

SPEAKERS: Mary Christine Jackman, Assistant Treasurer, City of Chicago, IL; Kristine Tallent, Assistant City Administrator/Chief Financial Officer, City of Franklin, TN; Scott D. McIntyre, CFA, Senior Portfolio Manager, Hilltop Securities Asset Management, Austin, TX

Black Caucus

Established in 1991, GFOA’s Black Caucus supports the aspirations and achievements of African American public finance officers, helps them pursue professional development opportunities, and sponsors projects which assist African Americans seeking careers in government finance. The annual business meeting provides a chance for caucus members to network, help caucus leaders plan for the upcoming year, and hear from subject-matter experts on timely topics. This year’s speaker will address the topic of economic development.
**SPEAKER:** Samuel Hughes, Assistant General Manager, Economic Development, Economic & Workforce Development Department, Los Angeles, CA

Sunday, 3:50 p.m. – 5:05 p.m.

**From Your Citizens to Overseas Investors – Who is Interested in Your Bonds?**

Room 403 B  
1.5 CPE  
Economics

Over the years there has been a greater breadth of investors interested in municipal bonds. Whether it is retail investors wanting to contribute to their community’s growth and well-being, or an international fund investor that is attracted to the safety and other positive attributes of municipal securities, governments need to know how to attract a variety of investors in today’s market. This session will focus on how issuers can market their communities and investment opportunities to this diverse and steadily growing pool of investors.

**SPEAKERS:** Bryan Kidney, Director of Finance and Administration, City of Independence, MO; Tom Paolicelli, Senior Manager, Business Development, BondLink, San Diego, CA; J. Ben Watkins, Director, Bond Division of Finance, State of Florida, Tallahassee, FL; Tim Coffin, Senior Vice President, Breckinridge Capital Advisors, Boston, MA

Sunday, 3:50 p.m. – 5:05 p.m.

**It’s an Inside Job: Developing an Internal Audit Function**

Room 403 C  
1.5 CPE  
Auditing – Governmental

Having an internal audit function provides government officials with an important tool to monitor and evaluate internal control activities that are essential to meeting a government’s objectives. Learn why governments should have an internal audit function and how a government can develop and operate an effective one. For governments considering contracting for the internal audit services, the session will discuss the pros and cons of outsourcing this function and how to oversee contract auditors to assure effectiveness.

**SPEAKERS:** Shakeel Yusuf, Comptroller, Fairfax County Public Schools, Falls Church, VA; David Sundstrom, CPA, Board Member, Governmental Accounting Standards Board (GASB), Norwalk, CT; Jim Olds, Audit Director, Port of Los Angeles, Los Angeles, CA; Bert Nuehring, Partner, Crowe LLP, Chicago, IL
Managing Construction Project Risk

Room 403 A  1.5 CPE  Management Services

Finance leaders may be good at constructing budgets and financial plans but budgeting and financial planning for construction can be challenging. Whether it’s the fluctuating cost of asphalt, uncooperative weather patterns, difficult labor unions, or a less-than-financially savvy public works director, completing a successful project requires more than preparing a good budget. This session will explore the role that the finance office can play to create and maintain an effective construction project monitoring function and help reduce the risk of high-profile construction projects going over schedule and/or over-budget.

SPEAKERS: Angel Mumma, Director of Finance, City of Dublin, OH; Mark Ruff, Chief Financial Officer, City of Minneapolis, MN; Richard Clarke, Chief Program Management Officer, Los Angeles Metro, Los Angeles, CA; Dr. April Mitts, Finance Director, City of St. Helena, CA

P-Cards: How to Integrate into an Effective Purchasing Function

Room 152  1.5 CPE  Specialized Knowledge

Even as governments have utilized online procurement mediums and purchasing card technology in recent years, implementation of a comprehensive P-card function can still be challenging from process, technology, and management perspectives. This session will focus on the pros and cons of P-cards, how to manage the implementation of a P-card program, and tips for developing, training, and enforcing organizational policies on P-card use. The session will also address developing P-card policies, building a relationship with your P-card provider, preventing fraud, integration of P-cards with your ERP system, and managing difficult departments/users.

SPEAKERS: Mark Romito, CPFO, Director of Finance, Upper St. Clair Township, PA; Cory Kampf, Finance & Central Services Division Manager, Anoka County, Anoka, MN; Heather Knust, Director of Budget, School District of Palm Beach County, West Palm Beach, FL; Patrice Sutton, Finance Director, Lake County, Waukegan, IL
Sunday, 3:50 p.m. – 5:05 p.m.

Peace in Admin Services: Playing Nicely with the HR Department

Room 408A  1.5 CPE  Business Management & Organization

Finance officers and human resource managers provide core administrative services that many organizations split into multiple departments. This can lead to tension, conflict, and inefficiency. Although recognizing that these departments serve various purposes and should be different, they often need to work together. This session will feature views from both finance and human resource professionals on balancing purpose, style, culture, and goals between distinct functions. Speakers will share how they stepped out of their box to understand different stakeholder viewpoints. Techniques that consider leadership styles will be emphasized. Working arrangements, such as service level agreements, policies, and business process strategies for creating a more cohesive delivery of services, will also be addressed. Lessons learned during this session may also apply to any process requiring cooperation among multiple organizations.

SPEAKERS: Martina M. Ferris, CPFO, Finance Director, Summit County Government, Breckenridge, CO; Deirdre M. Finneran, CPFO, Deputy Finance Director, County of Fairfax, Fairfax, VA; Jennifer Fuller, CPA, Deputy Human Resources Director, County of Riverside, Riverside, CA

Sunday, 3:50 p.m. – 5:05 p.m.

Public Pension Trends: What a Finance Officer Should Know

Room 151  1.5 CPE  Finance

What is going on in the world of public pensions? This session will highlight trends seen across pension plans and the implications they have on state and local government finance offices. Representatives from pension plans and other industry experts will provide updates on changing standards and requirements and inform finance officers what they should be aware of in the coming year.

SPEAKERS: Tim Skillman, Assistant Division Chief, Financial Office, CalPERS, Sacramento, CA; Gerald Young, Senior Research Associate, Center for State & Local Government Excellence, Washington, DC; Alex Brown, Research Manager,
Thinking Like a Bear: How to Prepare for a Recession

Are we headed for a recession? Some economists are worried economic expansion will not continue and warn to tread cautiously. Recognizing strong revenues might not continue, some governments are already preparing for a bear market. In this session practitioners from local governments will share their preparation strategies for thinking about budgeting over the long term. Speakers will discuss an economic outlook on state and local governments and provide perspectives on unique considerations for state and local governments.

SPEAKERS: Marc Gonzales, Director, Department of Finance (retired), Clackamas County, Oregon City, OR; Scott Mitnick, Director, KNN Public Finance, Oakland, CA; Somjita Mitra, Director, Institute for Applied Economics, Los Angeles County Economic Development Corporation, Los Angeles, CA; Matthew M. Lentz, Business Manager, Upper Moreland School District, Willow Grove, PA

Young Professional Networking Session

Are you a young public finance professional looking to build your professional network? Join us in this interactive session to network with peers across the U.S. and Canada. During this session you will have an opportunity to discuss issues that you and your organization are facing and seek advice from other GFOA members aged 40 and under.

Following the session attendees are encouraged to continue the conversation at GFOA's young professional networking event at a nearby venue, Rosa Mexicano, located at 800 W. Olympic Blvd., Los Angeles.

SPEAKER: Elizabeth Fu, Senior Manager, GFOA, Chicago, IL
Conference Registration, GFOA Products and Services Booth, and Message Center
8:00 a.m. – 4:00 p.m., South Lobby

General Session and Keynote Presentation
8:30 a.m. – 10:10 a.m.
Hall G, 2 CPE credits, Personal Development

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

Exhibit Hall
11:00 a.m. – 4:30 p.m.

Delegate Luncheon
12:10 p.m. – 1:30 p.m., Hall HJ, Dessert will be available in Hall K

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

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

Concurrent Sessions
4:15 p.m. – 5:30 p.m.
8:30 a.m. – 10:10 a.m.

**General Session and Keynote Presentation**
- Hall G
- 2 CPE credits
- Personal Development

**Welcome**
Eric Garcetti, Mayor, City of Los Angeles, CA

**President’s Address**
Steven Gibson
Deputy City Manager,
City of Rock Hill, SC

**Keynote Presentation**
James and Deborah Fallows, researchers and award-winning correspondents, will share their perspective from over hundreds of interviews from their five-year journey through the heart of America on what makes communities thrive.
Accounting and Auditing: Year in Review

Monday, 10:30 a.m. – 12:10 p.m.

SPEAKERS: Melinda Gildart, CPA, MBA, Controller, Chicago Public Schools, Chicago, IL; Michele Mark Levine, CPA, Director, Technical Services, GFOA, Chicago, IL; R. Kinney Poynter, CPA, Executive Director, National Association of State Auditors, Comptrollers, and Treasurers (NASACT), Lexington, KY; David A. Vaudt, CPA, Chairman, Governmental Accounting Standards Board (GASB), Norwalk, CT

Are You Getting the Most from Your Insurance?

Monday, 10:30 a.m. – 12:10 p.m.

SPEAKERS: Martin Lyons, Chief Financial Officer, City of Aurora, IL; Sonia Bridges, Risk Manager, City of Miami Beach, FL; Scott Carpinteri, Senior Vice President, Swiss Re, Westlake Village, CA; Gordon B. DesCombes, Executive Vice President, Alliant Insurance Services, Newport Beach, CA; Serena Sowers, Vice President, Swiss Re, Washington, DC
Monday, 10:30 a.m. – 12:10 p.m.

Canadian Update

Room 403 A  2 CPE  Finance

GFOA’s Canadian Update will focus on best practices and feature case study examples from two recent recipients of GFOA’s Award for Excellence. This session will also include a facilitated discussion around the state of “best practice” implementation in Canadian governments. Attend this session to learn from other governments, share your own ideas, and build relationships with your peers.

SPEAKERS: Craig Lesner, Senior Manager, GFOA, Chicago, IL; Paul Olafson, Corporate Controller, City of Winnipeg, MB; Christopher Paine, CPA, CGA, Director of Finance, City of Colwood, BC

---

Monday, 10:30 a.m. – 12:10 p.m.

Increasing Employee Awareness and Participation in Defined Contribution Retirement Plans

Room 411  2 CPE  Business Management & Organization

The panel will discuss participation levels in state and local government pension plans, a review of the funded status of state defined benefit plans and, as a result, the importance of raising awareness and participation in the defined contribution plans. The panel will focus on how to increase government employee awareness and participation in DC retirement savings plans (e.g., 457 plans). The panel will also discuss the rise of state-facilitated retirement savings programs.

SPEAKERS: Gary Ometer, CPA, CGMA, Chief Financial Officer (former), Virginia 529, Richmond, VA; John Doyler, Senior Retirement Strategist, Capital Group, Home of the American Funds, New York, NY; Robert Schultze, President and CEO, ICMA-RC, Washington, DC; Stacy Scapino, Partner and Global Wealth Strategy Leader, Mercer, Chicago, IL
New Strategies for Funding Capital Projects

Room 152  2 CPE  Finance

As populations evolve and grow, public finance officials must be prepared to plan for capital project developments that grow with their community and addresses the constantly changing needs of their fellow citizens. The current budgetary environment for state and local governments demands evaluating every available funding option to support growth and a high standard of living. With many localities operating through the year on slim margins, public finance officers must search for smart and innovative ways to fund their capital projects and ensure the future of their communities.

SPEAKERS: Laura Allen, Town Administrator, Town of Berlin, Berlin, MD; Lisa Marie Harris, Finance Director/Treasurer, San Diego County Water Authority, San Diego, CA; Sonia A. Nayak, Counsel, Nixon Peabody LLP, Los Angeles, CA; Julie Kim, Senior Fellow, Stanford Global Projects Center, Palo Alto, CA

The Investment Landscape: Bumpy or Smooth Road Ahead?

Room 408 A  2 CPE  Economics

With the Great Recession lingering in the minds of finance professionals, as well as having a more dynamic market than in previous years, governments need to be aware of what these changes in the market landscape mean for state and local governments. It is also critical that finance officers are able to discuss these trends with members of their governing bodies and the public in an accessible way. This session will provide attendees with an overview of how to review their existing investment policies and what types of investment strategies may be needed in the near future related to investment portfolios, and how to best communicate the investing landscape to those outside the finance office.

SPEAKERS: Michael Solomon, Treasurer, City of Saint Paul, MN; Kenton McCarthy, CEO, Vulcan Consultants, LLC, Scottsdale, AZ; Michelle Durgy, Senior Portfolio Manager, KCM Investment Advisors, LLC, San Rafael, CA; Vishal Thacker, Chief Investment Officer, Alameda County, Oakland, CA
Monday, 10:30 a.m. – 12:10 p.m.

What to Expect from SEC Rule 15c2-12 Amendments

Room 403 B  2 CPE  Specialized Knowledge

The Securities and Exchange Commission (SEC) recently approved amendments to Rule 15c2-12 that will affect the entire municipal bond market. While the SEC Rules do not directly require issuers of municipal securities to adhere to disclosure requirements, issuers have a responsibility to abide by their continuing disclosure agreements (CDA). Language related to disclosing bank loans and capital leases is now required in CDAs. This session will discuss how the issuer community has responded to the amendments and what finance officers can expect moving forward.

SPEAKERS: Giedre Ball, Debt Manager, Metropolitan Washington Airports Authority, Washington, DC; Ahmed Abonamah, Senior Counsel to the Director, Securities and Exchange Commission, Washington, DC; Peg Henry, Deputy General Counsel, Stifel Financial Corporation, St. Louis, MO; Paul Maco, Of Counsel, Bracewell, Washington, DC; David Erdman, Capital Finance Director, State of Wisconsin, Madison, WI

Monday, 10:30 a.m. – 12:10 p.m.

Working Successfully with Department Heads and Independently Elected Officials

PeTree D  2 CPE  Business Management & Organization

Financial sustainability is more likely to occur if everyone is working towards that goal. However, finance officers sometimes feel that the actions of department heads or independently elected officials are not financially sustainable. At this session you will hear about how the independently elected sheriff of San Bernardino County and the appointed chief executive officer built a relationship which enabled the County to meet its public safety objectives and be financially sustainable. The lessons you will learn are equally applicable to the relationship between finance officers and department heads in all types of governments and across all functional areas not limited to public safety.

SPEAKERS: Robert J. O’Neill, Executive in Residence, College of Charleston, Charleston, SC; Greg Devereaux, Managing Partner, Worthington Partners, Ontario, CA; John
McMahon, Sheriff-Coroner, San Bernardino County Sheriff’s Department, San Bernardino, CA

12:10 p.m. – 1:30 p.m., Hall HJ
**Delegate Luncheon**
This is a great opportunity to network. 
*Lunch is not open to guests or exhibitors. General seating is available. We ask that you please do not save seats or tables.*
Followed by dessert in the Exhibit Hall, Hall K.

12:10 p.m. – 1:10 p.m., Room 402
**School Budgeting Lunch**
RSVPs were accepted before the start of the conference. Limited space available.

---

**CONCURRENT SESSIONS 1:30 P.M. – 2:20 P.M.**

Monday, 1:30 p.m. – 2:20 p.m.
**Don’t Just Say No: Leveraging the Value of Public Procurement Function**
- Room 403 A  
- 1 CPE  
- Finance

The procurement office (or procurement function within a finance office) can be a strategic resource to assist departments aiming to streamline sourcing processes, save money through competitive purchasing, encourage competition and transparency, and promote societal goals. However, in many departments, the procurement function struggles to go beyond something more than just a hoop to jump through. In this session procurement professionals will speak about how to establish a strong partnership between finance and procurement and provide lessons learned from integrating procurement into the finance office. Additionally, for organizations looking to define purchasing, representatives from the National Institute of Governmental Purchasing (NIGP) will communicate key elements from their competency.
model that will certify procurement officers.

**SPEAKERS:** Barry McMeekin, Consulting Practice Manager, GFOA, Chicago, IL; Mike Bailey, Financial Consultant, Municipal Research and Services Center, Redmond, WA; Rick Grimm, CPPO, CPPB, FNIGP, Chief Executive Officer, National Institute of Governmental Purchasing (NIGP), Herndon, VA

Monday, 1:30 p.m. – 2:20 p.m.

**Future World: What Will Cyber Security Look Like in the Future?**

- **Room 152**  
- **1 CPE**  
- **Information Technology**

Is cyber security part of your long-term planning? If not, why not? If so, is it enough? The Internet of Things (IoT), Artificial Intelligence (AI), robotics, and cloud technologies will no longer be novelties in the near future; they will be expectations for a good work environment. Although exciting, the future has its risks and governments will need to make regular investments in solutions that address vulnerabilities generated by evolving technologies. In this session speakers will provide a glimpse into the future and describe potential paths to follow to manage identified and soon-to-be identified technologies. Attendees will learn the importance of including cyber security in their long-term planning processes.

**SPEAKERS:** Daniel Frye, SVP Corporate Security, Sierra Cedar, Alpharetta, GA; Shue-Jane Thompson, Vice President and Partner, Cyber and Biometric Service Line IBM, Washington, DC

Monday, 1:30 p.m. – 2:20 p.m.

**Great Expectations or Great Expense? XBRL and Other Strategies for Electronic Reporting**

- **Room 408 A**  
- **1 CPE**  
- **Information Technology**

Governments face pressure from a variety of fronts to make data readily accessible. However, not all transparency efforts provide the same benefits nor are all without expenses and burden to the government. This session will provide a discussion of current efforts to both develop and mandate the use of machine-readable reporting by governments, basic explanations of the technology and how it might affect your government,
and alternative technologies that might be less burdensome for governments.

**SPEAKERS:** Kenton Tsoodle, Interim Finance Director, City of Oklahoma City, OK; Michelle Savage, Vice President, XBRL US, Inc., San Francisco, CA; Darrel Thomas, Assistant City Administrator/Chief Financial Officer, City of Weston, FL

Monday, 1:30 p.m. – 2:20 p.m.

**Show Me the Way: A How To Guide to GASB 87**

- PeTree C  ■  1 CPE  ■  Accounting – Governmental

Implementation of GASB 87 will not only require governments to account for leases differently, it will also necessitate that finance staff gather information on all contracts that could be classified as leases, conduct analysis to determine how they should be reported, and perform required calculations. GFOA’s in-house experts will present some of the basics on how to decode lease terms, determine or infer discount rates, and calculate lease liabilities. GFOA will also demonstrate easy-to-use templates to assist with lease calculations and preparation of required journal entries.

**SPEAKERS:** Sue Iverson, Finance Director, City of Lake Elmo, MN; Todd Buikema, CPA, Assistant Director for Publications, GFOA, Chicago, IL; Peg Hartnett, Assistant Director for Training, GFOA, Chicago, IL

Monday, 1:30 p.m. – 2:20 p.m.

**Small Government Forum: Debt Management**

- Room 403 B  ■  1 CPE  ■  Finance

Small governments face numerous hurdles in their debt management programs often because they may lack in-house subject expertise. This session will focus on effective strategies for issuing debt, hiring outside professionals, meeting disclosure requirements, and utilizing checklists, policies, and procedures to best manage these responsibilities through the lens of a small government.

GFOA’s Small Government Forum is a discussion group that identifies and explores topics of interest to governments with populations less than 25,000.

**SPEAKERS:** Bob Eichem, Chief Financial Advisor, City of
Boulder, CO; **Anna V. Sarabian**, Principal, Fieldman, Rolapp & Associates, Inc., Irvine, CA; **Eric H. Johansen**, Debt Manager (retired), City of Portland, OR

Monday, 1:30 p.m. – 2:20 p.m.

**Strategic Planning and Budgeting**

- PeTree D  ■ 1 CPE  ■  Finance

Financial sustainability requires people to work together. If people can see they will be better off working together, they will work together. A shared vision is how people see. However, "vision statements" often have the well-deserved reputation of being mere platitudes with little lasting impact. This session will go beyond the buzzwords, consulting jargon, and “pretty pictures” and feature governments that have taken a different approach to community visions and strategic plans that can be used to guide an effective budget process. Speakers will discuss how to involve the community, define vision and goals, and how to transition from long-term strategic objectives to resource allocation.

**SPEAKERS:** **Kimberly Olivares**, Chief Performance Officer, City of Austin, TX; **Scott Huizenga**, Budget Director, City of Kansas City, MO; **Jennifer Park**, Director of Certification and Community, What Works Cities, New York, NY; **David Wert**, Public Information Officer, San Bernardino County, San Bernardino, CA

Monday, 1:30 p.m. – 2:20 p.m.

**Take the Next Step: Options for Leadership Development at GFOA**

- Room 150  ■ 1 CPE  ■  Personal Development

One of GFOA’s most important strategic initiatives is to encourage and support finance officers who take on a leadership role within their organization or within the public finance profession. GFOA has a number of opportunities to build leadership skills and enable members to take the next step in their career. This session will highlight GFOA leadership opportunities with its Executive Board and Committees. In addition, GFOA will provide an overview of its Financial Sustainability and Leadership Framework that is intended to provide leadership tools that can be used in your organization. Also, this October, GFOA will be hosting the inaugural GFOA Leadership Academy at the College of Charleston.
Current members who have been involved with each program and GFOA staff will be present to answer questions and discuss how you can get more involved with the organization and build critical leadership skills.

**SPEAKER:** Robert J. O'Neill Jr., Riley Center Fellow, College of Charleston, Charleston, SC

Monday, 1:30 p.m. – 2:20 p.m.

**The Check is Not in the Mail: Understanding Electronic Payment Methods for Receivables**

- Room 151
- 1 CPE
- Management Services

As electronic payment technology grows and changes, citizens will increasingly expect their governments to accept payments from a broad spectrum of platforms. The expansion of traditional online payment methods as well as new options like virtual wallets, mobile apps, self-service devices, and other payment applications, requires finance officers to understand both the benefits and limitations of each and to make decisions that balance government interests and customer service demands of the public. Governments must also weigh the costs associated with accepting payments via new technologies and accurately assess the viability of new technologies long term. This session will explore how governments can better utilize electronic payment portals, discuss the necessary internal controls and systems to accept different electronic payments, detail the current technology landscape and usage trends, and highlight electronic receivables policies and procedures for local governments.

**SPEAKERS:** Scott Gully, CPFO, Finance Director/Tax Commissioner, Village of Indian Hill, Indian Hill, OH; Nicole Haskins, Vice President of Sales, Paymentus, Blacksburg, VA; Andrew Durket, Treasurer, St. Louis County, Clayton, MO
All the Queen's Horses — Beyond the Movie

Hall G  1.5 CPE  Finance

The city comptroller and treasurer of Dixon, Illinois, stole $53 million of public funds across 20 years—making her the perpetrator of the largest case of municipal fraud in American history. She used the funds to build one of the nation’s leading quarter horse-breeding empires, all while forcing staff cuts, police budget slashing, and neglect of public infrastructure. While extreme, her story provides learning opportunities for all local governments to better protect themselves against the next case of fraud. Speakers, including the City’s attorney and representatives from the U.S. Marshals Service, will share their unique and direct experience with this situation and provide recommendations for all governments.

SPEAKERS: Kelly Richmond Pope, Associate Professor, School of Accountancy & MIS, DePaul University, Chicago, IL; David Legge, President/CEO, Legge Group, Springfield, VA; Jason Wojdylo, CFE, Chief Inspector, U.S. Marshals Service, Chicago, IL

Field of Dreams: Economic Development with Tourism

Room 403 A  1.5 CPE  Finance

Whether it’s recruiting the next big business, building a sports stadium, or competing for a large convention, economic development is about generating profitable activity beyond the sum of a community’s parts. This session will focus on several different concepts of economic development and the pros and cons of each. Ranging from sports to entertainment to good, old-fashioned fun in the sun, speakers will discuss both positive and negative experiences and identify lessons learned from each project. Speakers will also cover how to monitor a project to ensure promised benefits are developing as planned.

SPEAKERS: Walter C. Rossmann, Chief Operating Officer,
City of Santa Clara, CA; Jamie Rouch, Director of Finance, City of Branson, MO; Michelle Shumpert, CPA, Director of Financial Management and Reporting, City of Myrtle Beach, SC

Monday, 2:40 p.m. – 3:55 p.m.

**Investing Considerations for Small Governments**

- Room 408 A  ■ 1.5 CPE  ■ Economics

Small governments have the same responsibilities and duties as their large counterparts when it comes to managing and investing public funds. This session will focus specifically on how smaller entities can develop appropriate investment policies and strategies, including investing for liquidity, choosing the right benchmarks, and hiring advisors and broker/dealers.

**SPEAKERS:** Damien Grant, Vice President, Multi-Bank Securities, Inc., Southfield, MI; Martin D. Cassell, CEO/Chief Investment Officer, Chandler Asset Management, Inc., San Diego, CA; Harlita Tomlinson, Director of Finance and Tax Commissioner, City of Forest Park, OH; Darrel Thomas, Assistant City Manager/Chief Financial Officer, City of Weston, FL

Monday, 2:40 p.m. – 3:55 p.m.

**Life of the Ex-CFO**

- PeTree D  ■ 1.5 CPE  ■ Personal Development

Whether you are looking for a career change, approaching retirement, or looking to take on general administration, finance officers have many career options after reaching the title of CFO. This session will explore what a CFO can do next from the perspective of a panel of ex-CFOs that have made the jump from the finance officer. Speakers will be able to share advantages and disadvantages of life outside the finance office and answer questions from audience members on both professional and personal considerations of a career change.

**SPEAKERS:** Nancy Zielke, Senior Director, Alvarez & Marsal Public Sector Services, LLC, Kansas City, MO; Paul Arevalo, City Manager, City of West Hollywood, CA; Grace K. Leung, City Manager, City of Newport Beach, CA; Bruce Moe, City Manager, City of Manhattan Beach, CA; Linda R. Savitsky, Deputy Treasurer, Office of the State Treasurer, State of Connecticut, Hartford, CT
Monday, 2:40 p.m. – 3:55 p.m.

Navigating State Budgetary and Legislative Environments

Room 411  1.5 CPE  Finance

Local governments continue to face the challenge of providing for communities with changing needs. Adding to this stress is pressure from state government, whether in the form of decreased funding, increased mandates, or uncertainty around future support. This session will look at the current state budgetary and legislative landscape, predict what you can expect in the future, and provide strategies and recommendations for preparing for how your government can better handle the uncertainty.

SPEAKERS: Gila J. Bronner, CPA, President and CEO, Bronner Group, LLC, Chicago, IL; Brian Sigritz, Director of State Fiscal Studies, National Association of State Budget Officers, Washington, DC; Brian Egan, Principal Associate, Federal Advocacy, National League of Cities, Washington, DC

Monday, 2:40 p.m. – 3:55 p.m.

Raising Revenues Fairly

PeTree C  1.5 CPE  Finance

Local governments need revenues. However, the way in which those revenues are raised matters. If taxes or fees are seen as unfair or are levied on a weak part of the local economy, then those revenues—and the local government—will not be healthy for the long run. In this session you will hear from two California local governments and national experts who have worked extensively on reforming local government revenue systems both to provide adequate revenues for city services and to remain viable over time.

SPEAKERS: Ken Rust, Chief Financial Officer (retired), City of Portland, OR; Joe Minicozzi, AICP, Principal, Urban3, Asheville, NC; David Eichenthal, Managing Director, PFM Group Consulting, New Orleans, LA; Anne Stuhldreher, Director of Financial Justice Project, Treasurer & Tax Collector’s Office, City & County of San Francisco, CA; Jason Caudle, City Manager, City of Lancaster, CA
School Budgeting Best Practices

Monday, 2:40 p.m. – 3:55 p.m.

GFOA’s Best Practices in School Budgeting is a budget process framework centered on aligning resources to student outcomes. Strong collaboration between the finance and academic teams produces better stakeholder engagement, improved goal setting, comprehensive strategies to achieve goals, long-term financial planning, and a budget document that tells your district’s “story.” This session will include practical examples from districts who are implementing GFOA’s best practice recommendations and also highlight resources readily available to any district looking to improve its budget process.

**SPEAKERS:** Matt Bubness, Senior Manager, GFOA, Chicago, IL; Representatives from multiple districts working to implement GFOA’s Best Practices in School Budgeting

Still Searching for a Cure: The Latest in Health Care Trends

Monday, 2:40 p.m. – 3:55 p.m.

Even though the Affordable Care Act was signed into law almost ten years ago, the debate around health care still continues. Despite this, public employers have carried on, exploring strategies to continue providing highly-valued employee benefits while trying to contain costs. This session will provide an overview of what the current health care debate involves and the steps employers are taking amidst the uncertainty.

**SPEAKERS:** Duane Pitcher, CPA, CPFO, Finance Director, City of Ames, IA; Kate Grangard, CPA, CGMA, Chief Financial and Operating Officer, Gehring Group, Palm Beach Gardens, FL; Rob Jarzombek, Chief, Health Account Management Division, California Public Employees’ Retirement System, Sacramento, CA; Barbara Whitehorn, Chief Financial Officer, City of Asheville, NC
Monday, 4:15 p.m. – 5:30 p.m.

**Better Off Alone: Is Self-Insurance Right for You?**

- Room 151  ■  1.5 CPE  ■  Finance

Self-insuring your employee health benefit offers the potential for substantial cost saving. However, it could entail some risk. At this session you will hear from local governments who have self-insured their employee health plans and have done it well. You will learn the strategies they used to keep their plans financially strong, provide a quality benefit for employees, and mitigate the potential for unexpected losses.

**SPEAKERS:** Barbara Whitehorn, Chief Financial Officer, City of Asheville, NC; Richard Ward, FSA, FCA, MAAA, National Public Sector Health Practice Leader, Segal Consulting, Los Angeles, CA

Monday, 4:15 p.m. – 5:30 p.m.

**Impact of Pension Decisions on Credit Ratings**

- Room 403 B  ■  1.5 CPE  ■  Finance

With increased emphasis on pension decisions, how does plan management affect a state and local government’s credit rating? Does it differ for single employer, agent employer, or cost-sharing plans? In this session learn how rating agencies view funding, assumptions, and governance, and what effective financial management strategies plan sponsors can take.

**SPEAKERS:** Laura M. Montoya, Treasurer, Sandoval County, Bernalillo, NM; Mark E. Whelan, CPA, Chief Financial Officer, Teachers’ Retirement System, Frankfort, KY; Tim Blake, Managing Director in US Public Finance, Moody’s Investor Services, New York, NY; Todd Tauzer, Director, S&P Global Ratings, San Francisco, CA; Les Richmond, ASA, EA, MAAA, FCA, Vice President and Actuary, Build America Mutual, New York, NY
Leading by Example: Starting a Conversation on Diversity and Inclusion

Room 152  1.5 CPE  Management Services

The awareness and implementation of diversity and inclusion programs has become a trend in recent years. Although great strides have been made, both public and private sector organizations still face challenges as the issue itself covers a broad range of topics. As public finance professionals, the concept of diversity and inclusion is not only important for the workplace, but to the communities we serve. This session will address the emergence of diversity and inclusion programs in the public sector and will explore unconscious biases and impacts in the workplace and beyond.

SPEAKERS: Clara Santos, Department Fiscal Administrator, City of San Antonio, TX; Josh Diosomito, Senior Policy Analyst, U.S. Government Accountability Office, Los Angeles, CA; Melanie Keeton, Assistant Finance Director, City of San Antonio, TX; Michele Crichlow, Debt Finance Manager, San Diego County, San Diego, CA

Making a List and Checking It Twice: A Guide to the GFOA CAFR Award

Room 152D  1.5 CPE  Accounting – Governmental

GFOA has recently updated and reformatted the checklist of generally accepted accounting principles (GAAP) and program requirements for the Certificate of Achievement for Excellence in Financial Reporting (CAFR Award) Program. In addition to incorporating new GAAP and citations referencing the GASB’s Codification, the checklist focuses additional attention on newer, more complex standards, such as those related to pension and other post-employment benefits (OPEB), while somewhat condensing coverage of other topics. This session should be attended by anyone interested in preparing a better CAFR by making the most of this notable resource. This session will also include a discussion of selected common reporting deficiencies noted by reviewers.

SPEAKERS: Dennis Kauffman, CPFO, CPA, Chief Financial Officer, City of Roseville, CA; Jim Phillips, Senior Program Manager, GFOA, Chicago, IL; Qun (Tren) Wang, Manager, GFOA, Chicago, IL; Zhikuan Hu, Manager, GFOA, Chicago, IL
Preparing for the 2020 Census

As the federal government gears up for the 2020 decennial census, local units of government also need to be preparing to make sure all residents are counted in what will be the first-ever electronic census. At this session learn why the census matters for your community and what your organization can do to help ensure a complete count of your jurisdiction. You will gain a better understanding of the intricacies of the census process from representatives of the U.S. Census Bureau. In addition, you will learn more about the strategies other local governments are implementing to make sure the census is as accurate as possible.

SPEAKERS: Diana A. Ramirez, Director, Economic Development & Strategic Investments, Travis County, Austin, TX; Maria de la Luz Garcia, Director of Census, Office of Mayor Eric Garcetti, Los Angeles, CA; Jeffrey Enos, Deputy Regional Director, Los Angeles Region, U.S. Census Bureau, Los Angeles, CA

Scary Movie: Your Next ERP Project

ERP system projects are some of the most dreaded in local governments. Many local governments that relied on decades-old systems for critical financial and payroll functions are now facing the reality that a replacement is needed. Anyone that has been through one can tell you that ERP replacement projects are complex, tough, and organizationally challenging. Sound project management techniques, such as quality assurance and active management of your vendor, are pathways to success on your ERP project. But it also takes good leadership, a commitment to best practices, and focused work efforts to yield long-term returns on investment. Hear from ERP implementation veterans as they reflect on their ERP projects, share lessons learned, and discuss how to avoid the many pitfalls that have made ERPs so infamous over the years.

SPEAKERS: Jane Davis, ERP Project Manager, City of Port Orange, FL; Michael Jamison, Deputy CFO/Director of Financial Planning & Analysis, City of Detroit, MI; James
Kupfer, Chief Financial Officer, Kenosha County – Public Works and Development Services, Kenosha, WI; Tasha Tervalon Norcome, MSW, Assistant to the City Manager, City of Berkeley, CA

Monday, 4:15 p.m. – 5:30 p.m.

Small Government Forum: Staff Recruiting and Retention

Room 411  1.5 CPE  Finance

Finance officers in small governments face unique challenges not found in larger organizations. This forum will encourage participants to share challenges and also to offer solutions to the unique needs of small governments. Topics to be discussed include recruiting finance staff and managing with limited resources.

GFOA’s Small Government Forum is a discussion group that identifies and explores topics of interest to governments with populations less than 25,000.

SPEAKERS: Doug Thomas, Senior Vice President, Strategic Government Resources, Keller, TX; Ron Harker, Finance Director, City of Roseburg, OR

Monday, 4:15 p.m. – 5:30 p.m.

Strategies for Effective Presentations for Finance People

Room 408 A  1.5 CPE  Communications & Marketing

Whether the finance office is explaining certain budget expenditures to the council, making a presentation to a rating agency, or training staff on good internal controls, presentation style and delivery skills matter. All too often, good information can get lost or confused by a presenter that doesn't understand the principles of a good presentation. Public speaking and communication experts will discuss how to avoid common mistakes we all make in our presentations. Attend this session to learn practical tips for analyzing your audience, developing and communicating clear messages, and explaining complex topics (like government finance) to non-technical audiences.

SPEAKERS: Steve Yu, CFO and Assistant Dean, UCLA School of Law, Los Angeles, CA; Joan Jadali, Finance Director, City of Webster Groves, MN
TUESDAY AT-A-GLANCE

Conference Registration, GFOA Products and Services Booth, and Message Center
8:00 a.m. – 4:00 p.m., South Lobby

Business Meeting, General Session, and Keynote Presentation
8:30 a.m. - 10:00 a.m.
Hall G, 1 CPE Credit, Personal Development

Exhibit Hall
10:00 a.m. – 2:00 p.m., Hall K

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

Delegate Luncheon
12:15 p.m. – 1:30 p.m.
Hall HJ, Dessert will be available in Hall K

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.
Microsoft Theater
See page 62 for details.
8:30 a.m. – 10:00 a.m.

Business Meeting, General Session, and Keynote Presentation
- Hall G
- 1 CPE credit
- Personal Development

Welcome
Ron Galperin, Controller, City of Los Angeles, CA

Presiding:
Steven Gibson
Deputy City Manager, City of Rock Hill, SC

GFOA holds an annual meeting of the members to conduct official business. At this meeting GFOA’s 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 GFOA’s Executive Board.

Comments by Incoming President:
Terry S. Stone
Assistant Superintendent for Business and Operations, Hanover County Public Schools, Ashland, VA

Keynote Presentation
Peter Bregman, a best-selling author and regular contributor to several publications, including the Harvard Business Review, will provide strategies on how to handle difficult situations, act courageously, and build your leadership presence.
Tuesday, 10:20 a.m. – 12:00 p.m.

Caught in the Middle: Accounting and Financial Reporting for Conduit Debt Under GASB’s New Standard

Room 408 A  2 CPE  Accounting – Governmental

Conduit debt is issued by governments that may or may not be responsible for its repayment, repaid by obligors via lease-like agreements that don’t get accounted for as leases, and result in assets to which governments may or may not ever hold title. Come learn about GASB’s newest (anticipated) guidance and how it will affect government issuers of conduit debt.

SPEAKERS: Bob Balducci, Comptroller, New York City Municipal Water Finance Authority, New York, NY; Cindy Harris, Chief Financial Officer, Iowa Finance Authority, Des Moines, IA; Barry Fick, Executive Director, Minnesota Higher Education Facilities Authority, Saint Paul, MN

Tuesday, 10:20 a.m. – 12:00 p.m.

Disaster Recovery Series: Business Continuity

Room 151  2 CPE  Finance

Government services must be able to withstand not just natural disasters, but also other emergencies such as terrorist attacks, cybercrimes, mass shootings, and IT fraud. Ensuring your government’s ability to provide essential services during and after a disaster means planning to protect critical systems and business processes. In this session experts will discuss the components of a business continuity plan and include how to manage IT systems, handle accounting tasks, prepare necessary invoices, maintain internal controls, and safely accept and distribute funds. This session will highlight case studies of entities who have had to address these issues – and the tips they have to help other governments prepare for the unforeseen.

SPEAKERS: Jim Kreiser, Principal, Business Risk Services, CliftonLarsonAllen, Harrisburg, PA; Sharon Rahban Navizadeh, CPA, President, Rahban CPA & Consulting Inc., Los Angeles, CA; Junelyn Segui, Manager, Accounting 1, Ventura County Sheriff’s Business Office, Ventura, CA
Tuesday, 10:20 a.m. – 12:00 p.m.

**From the Cradle to the Grave: Life Cycle Costing**

- Room 403 A  
- 2 CPE  
- Specialized Knowledge & Applications

Making sure that sufficient funding is allocated to capital needs is a challenge for all governments. To get the most out of its assets, it’s imperative that governments strategically and quantitatively determine how to allocate scarce funding for asset maintenance and replacement. This session will provide an introduction to developing an asset management program and include recommendations on building an asset inventory, assessing current condition, prioritizing asset maintenance needs, and determining the appropriate time to replace or improve assets. Speakers will also provide recommendations for how to get started for governments of all sizes.

**SPEAKERS:** Donna Gayden, Interim Finance Director, City of Country Club Hills, IL; David Clark, Program Manager, Enterprise Financial Systems, District of Columbia Government, Washington, DC; Darryl Street, Senior Financial Policy Advisor, District of Columbia Government, Washington, DC; David Totman, Director of Asset Management, Innovyze, Monrovia, CA

---

Tuesday, 10:20 a.m. – 12:00 p.m.

**GFOA’s New Approach to Ethics**

- PeTree D  
- 2 CPE  
- Behavioral Ethics

Over the past year, GFOA has completely revised its approach to ethics based on scientific research indicating what works for promoting ethical behavior. At this session you will be introduced to GFOA’s new code of ethics and learn how you can put it into practice. You will hear about experiences from local government officials who participated in the development of this code, how it impacted their approach to public service, and how you might be able to use these experiences to help your community.

**SPEAKERS:** Chris Morrill, Executive Director/CEO, GFOA, Chicago, IL; Patrick Hamacher, Director of Legislative Analysis, King County, Seattle, WA; Jamie Nicholson, Director of Finance, City of Pataskala, OH; Stacey Russell, Fiscal Officer, Muskingum County Library System, Zanesville, OH
Tuesday, 10:20 a.m. – 12:00 p.m.

**Investing for Large Governments: Discussion Group**

- Room 411  
- 2 CPE  
- Economics

Many large governments approach their investing strategies with a strategic approach. Balancing risk and return help them to achieve their constituents’ expectations of optimizing taxpayer-provided resources. However, the key tenets of safety, liquidity, and return remain intact. This interactive session will provide an opportunity for larger entities to discuss: various aspects of their investment programs, events on the horizon that could impact public sector investing, and share other investing ideas and experiences with their peers.

**SPEAKERS:** Chris Daniel, CFA, CPA, CTP, Chief Investment Officer, City of Albuquerque, NM; Vic Erganian, Treasurer, City of Pasadena, CA; Paulina Woo, Managing Director, PFM Asset Management, LLC, Chandler, AZ

Tuesday, 10:20 a.m. – 12:00 p.m.

**Leading vs. Managing vs. Coaching**

- Room 152  
- 2 CPE  
- Personal Development

Do you want to be a leader, a manager, or a coach? To be effective, you might have to be all three. In this session learn the definitions of a leader, manager, and coach and learn when and how to apply these roles. Keep in mind, it’s a balancing act.

**SPEAKERS:** Melanie Lammers, Finance Manager, City of Hastings, MN; Jörg Bassek, Chief Administrative Officer, Borlänge Municipality/Board Member KEF (Swedish GFOA), Borlänge, Sweden; Stephanie Fritz, Director, Head of Analytical Learning, S&P Global Ratings; Nicole Gasparrì, Organizational Program Manager, City of Boca Raton, FL; Roland Svensson, Senior Consultant, KEF (Swedish GFOA), Malmö, Sweden

Tuesday, 10:20 a.m. – 12:00 p.m.

**Rating Agency Update**

- Room 403 B  
- 2 CPE  
- Specialized Knowledge

Finance directors remain mindful about credit rating agency criteria for state and local governments in this rapidly changing environment. This panel will discuss major components and recent changes in methodologies utilized by rating agencies that are
important for finance officers to understand. A review of GFOA’s best practice on engaging with rating agencies will also be highlighted.

**SPEAKERS:** Kathy Kardell, Senior Debt Administrator/Debt Manager, Office of Budget & Finance, Hennepin County, Minneapolis, MN; Karen Daly, Senior Managing Director, Public Finance and Financial Guaranty, Kroll Bond Rating Agency, New York, NY; Eric Hoffman, Senior Vice President & Manager, Moody’s Investor Service, San Francisco, CA; Laura Porter, Head of U.S. Public Finance, Fitch Ratings, New York, NY; Jane Ridley, Senior Director, S&P Global Ratings, Centennial, CO

Tuesday, 10:20 a.m. – 12:00 p.m.

**Strings Attached: Accounting for Intergovernmental Grants**

- PeTree C
- 2 CPE
- Accounting – Governmental

Intergovernmental grants make up a significant portion of the funds available to many governments, providing resources for some of the most important public services like education, housing, and public safety. But those funds come with many requirements from very specific guidelines on the use of the funds to extensive financial and programmatic reporting. Come to this session to hear how governments have been able to establish and maintain effective communication between program and finance functions in order to 1) selectively pursue grant opportunities that can benefit residents and service recipients with manageable constraints, and 2) successfully utilize funding to accomplish programmatic goals while meeting requirements such as reporting, subrecipient monitoring, and audit preparedness.

**SPEAKERS:** Peter James, Grant Accounting Supervisor, City of Fort Worth, TX; Stephen W. Blann, Owner/Director of Governmental Audit Quality, Rehmann, LLC, Grand Rapids, MI
CONCURRENT SESSIONS 2:00 P.M. – 3:15 P.M.

Tuesday, 2:00 p.m. – 3:15 p.m.

DC Plans in the Public Sector: An Update

- Room 403 B  ■  1.5 CPE  ■  Finance

Since the Great Recession, defined contribution (DC) plans have increasingly garnered attention among public employers. Join this session to hear how DC plans have evolved in the public sector and some of the top issues they face including the challenges of keeping participants in the plan and creating lifetime income streams for plan participants. This session will feature a discussion led by administrators of DC plans and cover the various strategies they have adopted including asset allocation and plan offerings.

SPEAKERS: Mike Kennington, Chief Financial Officer, City of Mesa, AZ; Barry Faison, CPA, Chief Financial Officer, Virginia Retirement System, Richmond, VA; Darlene Malaney, CIMA, Chief Operating Officer of Finance, Palm Beach County Clerk and Comptroller, West Palm Beach, FL; John Saeli, Vice President, Market Strategy and Government Affairs, ICMA-RC, Washington, DC

Tuesday, 2:00 p.m. – 3:15 p.m.

Financial Transparency in the Modern Era

- PeTree C  ■  1.5 CPE  ■  Finance

As stewards of shared resources, finance officers are tasked with managing public funds in an efficient and effective manner. Inherent in this role is an expectation of accountability and transparency to the community being served. As the availability of information has grown, the methods of accountability and transparency have rapidly evolved. This session will explore the meaning and
purpose of financial transparency and how budget and performance information can be clearly communicated to the public. Speakers will address what financial transparency is in the modern era and why it’s important to enhance financial reporting and budgeting.

**SPEAKERS:** Lee Ann Shortland, Director of Finance, City of Westerville, OH; Ron Galperin, Controller, City of Los Angeles, CA; Debbie Chiu, Budget Operations Manager, City of Kansas City, MO; Cory Kampf, Finance & Central Services Division Manager, Anoka County, Anoka, MN; Clae Hack, Director of Finance, City of Saskatoon, SK

Tuesday, 2:00 p.m. – 3:15 p.m.

**Horrible Bosses: Are You One and How to Deal with One**

- Room 151
- 1.5 CPE
- Personal Development

Ideally, all GFOA members would have great managers who help them succeed and make them feel valued. Unfortunately, not everyone has this ideal situation. In fact, in GFOA’s recent survey regarding employee engagement and job transitions, the number one reason for a member to leave an organization was due to conflicts with their supervisor. During this session speakers will discuss strategies on how to manage up, evaluate the overall situation at hand, and assess if it is really time for a change.

**SPEAKERS:** Doug Farmen, Finance Director, City of Centennial, CO; Bryan Kidney, Director of Finance and Administration, City of Independence, MO; Dr. Tanya S. Harris, CPA, General Accounting Division Chief, Riverside County Auditor-Controller, Riverside, CA

Tuesday, 2:00 p.m. – 3:15 p.m.

**Hot Topics in the Muni Market**

- Room 408 A
- 1.5 CPE
- Finance

There are a number of issues, both internal and external, that finance officers and other government leaders must have a firm understanding of as they prepare to access the municipal bond market. Local governments must balance an often limited amount of resources with the ever-changing regulatory environment, risks associated with climate change and cyber security, and pressure from investors to disclose information to the market as quickly and accurately as possible. Speakers in this
session will discuss what finance officers and debt managers need to be aware of in the current market environment and how it impacts their ability to issue debt.

**SPEAKERS:** Kendel Taylor, Director of Finance, City of Alexandria, VA; Tom Doe, President, Municipal Market Analytics, Concord, MA; Richard J. Moore, Partner, Orrick, Sutcliffe & Herrington, San Francisco, CA; Leslie M. Norwood, Managing Director and Associate General Counsel, SIFMA, New York, NY

Tuesday, 2:00 p.m. – 3:15 p.m.

**Protecting the Cloud**

- Room 152
- 1.5 CPE
- Information Technology

As governments rely more heavily on software vendors to provide essential applications through the cloud, they also need to understand how to manage and understand the risks with cloud applications. Speakers in this session will discuss how to manage ongoing risk through service level agreements, evaluate system and data security, understand SOC reports, and ensure compliance with HIPPA, PCI, and other standards. Attendees will understand key lessons-learned to protect your organization from common risks associated with cloud applications. In addition, important considerations when integrating existing on-premise solutions to cloud applications will be discussed.

**SPEAKERS:** Mickie L. Pearsall, Director of Finance, Milwaukee Metropolitan Sewerage District, Milwaukee, WI; Hardik Bhatt, Leader, Digital Government, Amazon Web Services, Chicago, IL; Phil Bertolini, Deputy County Executive/CIO, Oakland County, Pontiac, MI; Craig Williams, Director Infrastructure Consulting Services, ClientFirst Technology Consulting, Corona, CA

Tuesday, 2:00 p.m. – 3:15 p.m.

**Staying on Your Toes: Fraud Schemes**

- PeTree D
- 1.5 CPE
- Auditing – Governmental

Every government finance officer worries about internal and external fraud exposures facing their government. Even the most robust policies and controls may not prepare a government against the fraud of the future. This session will highlight various fraud schemes including hearing from the U.S. Secret Service on
counterfeit currency issues. Attendees will also learn about methods for identifying fraud, and how to have appropriate internal controls to safeguard against such events.

**SPEAKERS:** Sherry Thomas, Accountant, City of Peoria, IL; Karen Karwoski, Senior Vice President – Treasury Management Division, Simmons Bank, St. Louis, MO; Stefan Jaskulak, CTP, CPFO, CFIP, Chief Financial Officer and Director of Finance and Administrative Services, Midpeninsula Regional Open Space District, Los Altos, CA

Tuesday, 2:00 p.m. – 3:15 p.m.

**The Good, the Bad and the Ugly: Collecting New Taxes**

- **Room 403 A**
- **1.5 CPE**
- **Specialized Knowledge**

Whether new taxes are supported by the community or not, the finance officer plays an important role in tax administration by ensuring that taxes are collected efficiently, fairly, and correctly. Speakers in this session will discuss how governments implemented new sales taxes, marijuana taxes, sugar taxes, land taxes, business taxes, or adjusted existing taxes to changes in legislation, court rulings, or citizen behavior governments. In addition, speakers will highlight key impacts that governments can expect from the *South Dakota v. Wayfair* decision and the streamline sales tax initiative.

**SPEAKERS:** Craig Johnson, Executive Director, Streamlined Sales Tax Governing Board, Westby, WI; Seth Kerstein, Economist, California Legislative Analyst’s Office, Sacramento, CA; Clara L. Santos, Department Fiscal Administrator, City of San Antonio, TX

Tuesday, 2:00 p.m. – 3:15 p.m.

**Urban Forum**

- **Room 411**
- **1.5 CPE**
- **Finance**

GFOA’s Urban Forum will provide networking opportunities and speakers discussing issues facing larger organizations, in particular GFOA attendees representing governments from metropolitan areas with over 1,000,000 people. Specific discussion topics will be based on a survey of GFOA Urban Forum members and will be announced in May.

**SPEAKERS:** Representatives from governments involved in GFOA’s Urban Forum
California State Treasurer Fiona Ma Addresses Public Finance Policy Challenges and Solutions

- Hall G  
- 1.5 CPE  
- Finance

California State Treasurer Fiona Ma, CPA, will address several hot topics her administration is facing in California similar to states across the United States. Come to this session to hear about the vital role of municipal bonds in capital markets, advocacy for affordable housing and other current challenges facing local government, such as marijuana tax revenues and pensions. Treasurer Ma will discuss some of the policy challenges and solutions of her administration and provide food for thought as other states address similar challenges.

**SPEAKERS:** Jay Goldstone, Managing Director, MUFG, Los Angeles, CA; Fiona Ma, CPA, Treasurer, State of California, Sacramento, CA

Fiduciary Activities... or What? Accounting and Financial Reporting for Fiduciary Activities

- Room 408 A  
- 1.5 CPE  
- Accounting – Governmental

So you’re in the process of evaluating items you account for in your fiduciary funds to see if they qualify as fiduciary activities under GASB 84. But what do you do with the items that don’t qualify? In addition to discussing GASB’s new standards and implementation guidance, this session will look at how to determine the correct accounting for the assortment of items previously reported as fiduciary.

**SPEAKERS:** Margaret Moggia, CPA, Chief Financial Officer, West Basin Municipal Water District, Carson, CA; Heather Knust, Director of Budget, School District of Palm Beach County, West Palm Beach, FL; Ron Tolstad Jr., Technical Specialist, North Dakota Office of the State Auditor, Bismark, ND; Bhakti Patel, Audit Senior Manager, Grant Thornton LLP, Austin, TX
Learn to Speak Like a CPA: Accounting 101 for Non Accountants

Tuesday, 3:35 p.m. – 4:50 p.m.

SPEAKERS: Nicole Larson, Finance Director, Village of Glencoe, Glencoe, IL; Dan Buffalo, Finance Director, City of Ukiah, UT; Ember Strange, Executive Director, University of Central Arkansas Foundation, Conway, AR

Picking Up The Pieces. Disaster Recovery Series: Rebuilding

Tuesday, 3:35 p.m. – 4:50 p.m.

SPEAKERS: Ari J. Sky, Chief Financial Officer, City of New Bedford, MA; Peter Gibbons, Disaster/Flood Recovery Manager, City of Longmont, CO; Amy J. Davis, Finance Director, Chatham County, Savannah, GA; Rob Freeman, Assistant General Manager, City of Los Angeles Emergency Management Department, CA
Tuesday, 3:35 p.m. – 4:50 p.m.

**Replacing LIBOR**
- Room 403 B  
- 1.5 CPE  
- Specialized Knowledge
Starting in 2022, the Secured Overnight Financing Rate (SOFR) will replace the London Interbank Offered Rate (LIBOR) as the benchmark for derivative and swap transactions in the municipal market. This session will summarize work done so far by representatives from GFOA to the Alternative Reference Rate Committee (ARRC) on the transition to the alternative rate. Speakers will also discuss the complexities of the conversion process to inform issuers on how they should approach existing and future transactions.

**SPEAKERS:** B. Jonas Biery, Business Services Manager, Bureau of Environmental Services, City of Portland, OR; Patrick J. McCoy, Director of Finance, Metropolitan Transportation Authority, New York, NY; Nat Singer, Senior Managing Director, Swap Financial Group, La Jolla, CA; Victor Hsu, Partner, Norton Rose Fulbright US LLP, Los Angeles, CA

---

Tuesday, 3:35 p.m. – 4:50 p.m.

**Small Government Forum: Purchasing Policies/Capital Projects**
- Room 411  
- 1.5 CPE  
- Finance
Finance officers in small governments face unique challenges not found in larger organizations. This forum will encourage participants to share challenges and also offer solutions to the unique needs of small governments. Topics to be discussed include the development of purchasing policies and also the challenges to generate revenue for capital projects.

GFOA’s Small Government Forum is a discussion group that identifies and explores topics of interest to governments with populations less than 25,000.

**SPEAKERS:** Daphna Schwartz, Finance Director, Town of Hillsborough, Hillsborough, NC; Jeffrey A. Hansen, Finance Director, City of Golden, CO
Tuesday, 3:35 p.m. – 4:50 p.m.

**Under Pressure — Leadership throughout the Budget Process**

- Room 151  
- 1.5 CPE  
- Personal Development

By design, government makes tough decisions every day. Even well-seasoned budgeteers can recall when they first learned to say "no." This session will provide recommendations from experienced finance and budget officers on how to have difficult conversations; coordinate an effective process that facilitates discussion and collaboration; and involve elected officials in the decision-making process early enough to better balance competing demands in the face of varying pressure.

**SPEAKERS:** Michael A. Bryant, Management and Budget Director, Mecklenburg County, Charlotte, NC; Brigitte Elke, Finance Director, City of San Luis Obispo, CA; Bob Eichem, Chief Financial Advisor, City of Boulder, CO; John Gross, Finance Director/Chief Financial Officer, City of Long Beach, CA

Tuesday, 3:35 p.m. – 4:50 p.m.

**Utility Finance Forum**

- Room 403 A  
- 1.5 CPE  
- Finance

Utility finance requires detailed knowledge in rate setting, enterprise accounting, asset management, and understanding regulations.

*This networking group is composed of GFOA members from utility organizations and municipalities that operate utilities.*

**SPEAKERS:** Ed Donahue, President/CEO, Municipal & Financial Services Group, Annapolis, MD; Richard Morales, Debt Manager, San Francisco Public Utilities Commission, San Francisco, CA; Ted Phillips, Chief Financial Officer, Huntsville Utilities, Huntsville, AL
Tuesday, May 21 • 7:00 p.m. – 10:30 p.m.
Microsoft Theater, L.A. Live • 777 Chick Hearn Ct,
Los Angeles • General Admission Seating

7:00 p.m. Doors Open, Dessert, and Drinks
8:00 p.m. Entertainment

After enjoying a night out for dinner in Los Angeles, join us for an evening filled with entertainment and fun!

In an exclusive show for GFOA attendees and guests, don’t miss Jim Gaffigan! Gaffigan is a three-time Grammy nominated comedian, actor, writer, producer, two-time New York Times best-selling author, top touring performer, and multi-platinum-selling father of five. He is known around the world for his unique brand of humor, which largely revolves around fatherhood and his observations on life.

Following Jim’s set get ready to dance to the energetic sounds of The Red Hot Band, a fixture in L.A.’s music scene!

What better way to top off your stay in L.A.?

GFOA will run courtesy roundtrip shuttle between the Freehand, Intercontinental, L.A. Grand, Millennium, Omni, Sheraton, Standard, Westin and Microsoft Theater. All other hotels in the GFOA official hotel block are within walking distance to Microsoft Theater.

Limited tickets are available for purchase at GFOA Registration in the South Lobby of the convention center. Ticket price includes entertainment, beverages, and dessert. If you purchased tickets before the start of the Annual Conference, they were mailed to you with your conference badge.

Adults: $30  ■  Children and young adults under 21: $15  ■  Children under 5: complimentary
WEDNESDAY AT-A-GLANCE

Conference Registration, GFOA Products and Services Booth, and Message Center
8:00 a.m. – 11:00 a.m.

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

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

JOIN US IN NEW ORLEANS

Thank you for participating in this year's conference.

On your way out, be sure to pick up a thank you bag from members of GFOA's staff and the Executive Board. They will be in the South Lobby between 11:00 a.m. – 12:15 p.m.

We hope to see you at GFOA's 114th Annual Conference!
Wednesday, 8:30 a.m. – 10:10 a.m.

**After the Hire: On-Boarding Finance Staff**

Room 403 A  
2 CPE  
Personnel/Human Resources

Much attention has been put on governments’ need to recruit the next generation of finance officers. But what do you do once they are hired? This session will discuss how to on-board your new finance staff and ensure they become effective components of the finance staff.

**SPEAKERS:** Grant Yee, Director of Finance (retired), City of Ontario, CA; Laura Larsen, Budget and Program Evaluation Manager, City of Madison, WI; Nickie Lee, Assistant City Administrator, City of Smithville, MO

---

Wednesday, 8:30 a.m. – 10:10 a.m.

**All Roads Lead to Rome: Choosing the Best Method for Preparing Your Budget**

PeTree C  
2 CPE  
Finance

While every state and local government will eventually develop and adopt a budget, the process to arrive at that final plan can differ substantially. Over time, several common approaches to budgeting have emerged. This session will explain the difference between common approaches including incremental budgeting, zero-base budgeting, target-base budgeting, performance-base budgeting, priority-base budgeting, budgeting for outcomes, and more. Practitioners with experience using each method will discuss advantages, disadvantages, cautionary tales, and overall preferences.

**SPEAKERS:** John Fishbein, Senior Program Manager, GFOA, Chicago, IL; Andrew Kleine, Chief Administrative Officer, Montgomery County, Rockville, MD; Chris Fabian, Co-Founder, ResourceX, Denver, CO; Brad Harris, Finance and Accounting Consultant, University of Tennessee – Municipal Technical Advisory Service, Knoxville, TN; Kelly Strueby, Director, Office of the Budget, Regional Municipality of York, Newmarket, ON
Wednesday, 8:30 a.m. – 10:10 a.m.

**Banking Services: How to Determine What You Need and How to Get It**

- Room 152  
- 2 CPE  
- Management Services

GFOA recommends that governments procure banking services through an RFP process, which is discussed in GFOA’s "RFP for Banking Services Checklist." Industry experts will discuss how governments should determine their banking services needs related to credit card processing, cash management, and general treasury operations, and know the types of banking services available. In addition to establishing the criteria for a banking services RFP, industry experts will also address selecting the right bank for your entity, negotiating banking services contracts and fees associated with various services.

**SPEAKERS:** Tammy Queen, Deputy Director of Finance, City of Kansas City, MO; Mary Beth Huber, Deputy Treasurer, City of Cary, NC; Jonathan Millard, Senior Vice President and Market Leader, Bank of America Merrill Lynch, San Francisco, CA

Wednesday, 8:30 a.m. – 10:10 a.m.

**Gone with the Wind: Your Security Walls Are Down**

- Room 403 B  
- 2 CPE  
- Information Technology

This session will explore a case study in cybercrime. Speakers will discuss how the victims discovered their systems were compromised and the impacts of the intrusion. Speakers will also describe the steps victims took to successfully (or unsuccessfully) address the issue. The session will close with prevention techniques including non-technology solutions organizations should consider such as retaining legal expertise, technology insurance, and other measures often overlooked or ignored.

**SPEAKERS:** Lalit Ahluwalia, Managing Director – North America Security Lead (Health & Public Sector), Accenture, Dallas, TX; David Shipley, Chief Executive Officer, Beauceron Security, Inc., Fredericton, NB; Guillermo Christensen, Partner, IceMiller, Indianapolis, IN
Wednesday, 8:30 a.m. – 10:10 a.m.

Investing in Infrastructure

Room 151  ■  2 CPE  ■  Finance

According to the most recent Report Card for America’s Infrastructure from the American Society of Civil Engineers (ASCE), the physical condition and needed investment for infrastructure in the United States received a D+ grade. A large portion of the infrastructure in the U.S. is considered to be in poor to fair condition and approaching the end of its service life. This session will highlight potential solutions from finance officers and other technical experts. Speakers will also discuss how governments can implement strategies addressing infrastructure and the political realities impacting these issues.

SPEAKERS: William Jones, City Administrator, City of Mequon, WI; Brendan Hanlon, Chief Financial Officer, City & County of Denver, CO; Marla Bleavins, Deputy Executive Director & Chief Financial Officer, Port of Los Angeles, San Pedro, CA

Wednesday, 8:30 a.m. – 10:10 a.m.

OPEB Trends: What a Finance Officer Should Know

Room 408 A  ■  2 CPE  ■  Finance

As the current state of other post-employment benefits (OPEB) continues to evolve, certain trends have begun to emerge. This session will review findings of recent research to provide a snapshot of what public-sector employers are doing to manage growing costs. Join this discussion to learn what current or past practices could be implemented to help prepare for this changing landscape.

SPEAKERS: Cindy Chao, Financial Analyst, Sacramento Regional Fire EMS Communications Center, Sacramento, CA; Piotr Krekora, Actuary, Gabriel, Roeder, Smith & Company, Fort Lauderdale, FL; Robert Scott, Chief Financial Officer, City of Carrollton, TX; Maureen Toal, Senior Vice President, Public Agency Retirement Services (PARS), Newport Beach, CA
Wednesday, 8:30 a.m. – 10:10 a.m.

**Or We Could Just Buy It: Accounting and Financial Reporting for Leases**

- PeTree D  
- 2 CPE  
- Accounting – Governmental

GASB Statement No. 87, *Leases*, requires lessor and lessee governments to analyze existing lease agreements to properly measure and report assets, liabilities, revenues, expenditures, and deferred items associated with the new standard. This will have significant ramifications in terms of increasing the level of long-term debt reported by governments that use leased facilities and equipment in their operations. Speakers for this session will provide practical implementation tips including a walk-through of the steps required for analyzing and recording example leases under GASB 87, inferring interest rates when the rate charged by the lessor is unknown, and the use of GFOA’s lease resource tool.

**SPEAKERS:** Kimberly Francisco, CPA, MSA, Controller, City of Rockville, MD; Ted Williamson, Partner, RubinBrown, LLP, St. Louis, MO; Ken Burke, CPA, Pinellas County Clerk of the Circuit Court and Comptroller, Clearwater, FL

**CONCURRENT SESSIONS 10:30 A.M. – 12:10 P.M.**

Wednesday, 10:30 a.m. – 12:10 p.m.

**Adjusting to Changing Service Levels**

- Room 151  
- 2 CPE  
- Finance

Budgeting requires funding services to meet community conditions. For most governments, the traditional budget process supports maintaining the status quo, but this is not always appropriate. Rising costs, changing demographics, societal pressures, economic development, and major challenges facing a community can cause significant shifts in service demand and delivery. What is a finance officer’s role in helping operating departments through these changing service needs? Speakers will discuss lessons learned and how they have worked with operating departments to address challenges related to budgeting for changing service levels and developing public services to meet an ever-dynamic environment.
**SPEAKERS:** Melissa D. Carter, Chief Budget Officer, City of Savannah, GA; Pamela Scales, Deputy Chief Financial Officer, City of Detroit, MI; John Parks, Director of Office of Management & Budget, Montgomery County, Dayton, OH

Wednesday, 10:30 a.m. – 12:10 p.m.

**Capital Asset Best Practice Overview**

- **PeTree D**
- **2 CPE**
- **Finance**

GFOA’s Committees have recently developed a number of best practices that provide guidance to finance officers in all types of organizations on how to organize, manage, and implement an effective capital improvement and capital asset management program. Leading practitioners will highlight GFOA’s best practices; provide examples of capital planning policies, capital asset management, capital reserve and replacement policies; and procedures for capitalizing and tracking assets and asset improvements.

**SPEAKERS:** Merrill Shepherd King, Finance Director/Treasurer, City of Minnetonka, MN; Kent Austin, Bond Program Manager, City of Dallas, TX; Natalie Kent, Local Government Specialist, Local Government Finance Professionals Queensland Inc., Burpengary East, Australia; Grace O. Martinez, CPA, Director of Accounting, San Mateo County Transit District, San Carlos, CA

Wednesday, 10:30 a.m. – 12:10 p.m.

**Golden Rules: The New Yellow Book, and How it will Affect You**

- **Room 152**
- **2 CPE**
- **Auditing – Governmental**

In July 2018, the U.S. Government Accountability Office (GAO) issued a new version of its publication *Government Auditing Standards* ("GAS," also known as “Generally Accepted Governmental Auditing Standards” or “GAGAS”). The publication is often called “The Yellow Book” based on the traditional color of its cover. Major changes include a new format, expanded independence requirements that may affect the kinds of non-audit services CPAs can provide to their government audit clients, and new guidance on auditor’s responsibilities to report on waste and abuse discovered during audits. Other changes, including peer review and continuing education requirements, will directly affect independent auditors and government audit shops that perform their work in accordance with “The Yellow Book” standards.
Whether you’re an auditor or an auditee, come to this session to hear how these changes will affect you.

**SPEAKERS:** Elizabeth Fu, Senior Manager, GFOA, Chicago, IL; Mark Gassaway, Finance Director, Clark County, Vancouver, WA; John Baier, Deputy State Auditor, California State Auditor, Sacramento, CA; Flo Ostrum, Partner-National Professional Practice Director, Grant Thornton, LLP, Fort Lauderdale, FL; Anne A. Fritz, Chief Financial Officer, City of St. Petersburg, FL

Wednesday, 10:30 a.m. – 12:10 p.m.

**Re-Designing Defined Contribution Plans**

- Room 403 A  ■  2 CPE  ■  Finance

There has been discussion on Defined Contribution (DC) asset allocation and trying to convert them to lifetime income streams. Several plans are looking into re-designing their DC plans. The session begins by examining the current landscape for DC plans, and understanding the fiduciary duties.

**SPEAKERS:** Debby Cherney, Chief Executive Officer, San Bernardino County Employees’ Retirement Association, San Bernardino, CA; Sandy Matheson, Executive Director, Maine Public Employees Retirement System, Augusta, ME; Marcus Wu, Partner, Pillsbury Winthrop Shaw Pittman, San Diego, CA; Rasch Cousineau, Senior Consultant, Hyas Group, Portland, OR

Wednesday, 10:30 a.m. – 12:10 p.m.

**Referendum and the Finance Office**

- Room 403 B  ■  2 CPE  ■  Communications & Marketing

Referendums are an important tool for funding the business of local government, but they’re hardly straightforward. A government’s finance officer should play a crucial role in putting referendum proposals in perspective from the fiscal standpoint. Finance officers can provide a thorough analysis about funding that will help the organization put together a referendum that uses taxpayer money effectively and answer residents’ concerns about whether the money is really needed and how it will be spent — without any political spin. In this session finance officers who have extensive experience with referendums will share their tips and ideas to help you make the most of this funding tool.

**SPEAKERS:** Robin Campbell, Assistant County Manager,
Types of Legal Counsel Available to Issuers

Common legal roles in bond transactions are issuer counsel, bond counsel, underwriter counsel, disclosure counsel, and special tax counsel. For issuers who are infrequently in the market, distinguishing between who to engage and when is important and often a confusing part of the issuance and management of debt. Speakers will share their insights on how best to interact with legal advisors.

SPEAKERS: Timothy M. Ewell, Chief Assistant County Administrator, Contra Costa County, Martinez, CA; Dee Wisor, Partner, Butler Snow LLP, Denver, CO; Jacquelyne M. Jennings, Partner, Schiff Hardin LLP, San Francisco, CA; Dave Angelo Sanchez, Senior Counsel, Norton Rose Fulbright US LLP, San Francisco, CA


Blockchain, cyber currency, and practical applications of distributed ledger technology. While government adoption of this technology has been limited thus far, it holds much promise for the future. This session will provide an overview of blockchain technology as well as a discussion of actual applications and what all finance officers need to know about future potential impacts on financial management.

SPEAKERS: Jase Wilson, Founder and CEO, Neighborly, San Francisco, CA; Hardik Bhatt, Leader, Digital Government, Amazon Web Services, Chicago, IL; John Mirkovic, Deputy Clerk – Policy & Communications, Cook County, Chicago, IL; Kalie Work, Recorder, Washoe County, Reno, NV
Exhibits are located in **Hall K**. To learn more about each exhibitor and their products and services, refer to the Buyer’s Guide posted at [www.gfoa.org](http://www.gfoa.org).

### EXHIBIT HOURS

**RIBBON CUTTING**

**Sunday, May 19**  
10:00 a.m.

Festivities will include a ribbon cutting and Starbucks gift cards to the first 113 delegates in line for the hall’s opening (prizes exclude guests and children).

- **Sunday, May 19**  
  10:00 a.m. – 1:30 p.m.
- **Monday, May 20**  
  11:00 a.m. – 4:30 p.m.
- **Tuesday, May 21**  
  10:00 a.m. – 2:00 p.m.

<table>
<thead>
<tr>
<th>COMPANY NAME</th>
<th>BOOTH NO.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit New Orleans Host 2020 Annual Conference</td>
<td>641</td>
</tr>
<tr>
<td>AccuFund, Inc.</td>
<td>239</td>
</tr>
<tr>
<td>ACOM Solutions</td>
<td>633</td>
</tr>
<tr>
<td>AdComp Systems Group</td>
<td>652</td>
</tr>
<tr>
<td>AIG Retirement Services</td>
<td>443</td>
</tr>
<tr>
<td>AKA Enterprise Solutions</td>
<td>607</td>
</tr>
<tr>
<td>Alternative Claims Management</td>
<td>237</td>
</tr>
<tr>
<td>Amazon Business</td>
<td>710</td>
</tr>
<tr>
<td>American City and County</td>
<td>228</td>
</tr>
<tr>
<td>American Deposit Management</td>
<td>324</td>
</tr>
<tr>
<td>Andrews Technology HMS, Inc.</td>
<td>830</td>
</tr>
<tr>
<td>Arbitrage Compliance Specialists, Inc.</td>
<td>529</td>
</tr>
<tr>
<td>Association of Government Accountants</td>
<td>700</td>
</tr>
<tr>
<td>Assured Guaranty</td>
<td>831</td>
</tr>
<tr>
<td>AST LLC</td>
<td>601</td>
</tr>
<tr>
<td>Automated Merchant Systems, Inc.</td>
<td>409</td>
</tr>
<tr>
<td>AXA</td>
<td>637</td>
</tr>
<tr>
<td>Azavar Government Solutions</td>
<td>625</td>
</tr>
<tr>
<td>Badger Meter</td>
<td>829</td>
</tr>
<tr>
<td>EXHIBITORS</td>
<td></td>
</tr>
<tr>
<td>------------</td>
<td></td>
</tr>
<tr>
<td>The Baker Group 852</td>
<td></td>
</tr>
<tr>
<td>Balancing Act 728</td>
<td></td>
</tr>
<tr>
<td>Beauceron Security, Inc. 755</td>
<td></td>
</tr>
<tr>
<td>BKD, LLP 201</td>
<td></td>
</tr>
<tr>
<td>Blackbaud 650</td>
<td></td>
</tr>
<tr>
<td>BLX Group 819</td>
<td></td>
</tr>
<tr>
<td>BMO Financial Group 216</td>
<td></td>
</tr>
<tr>
<td>BMS Technologies 708</td>
<td></td>
</tr>
<tr>
<td>BNY Mellon 202</td>
<td></td>
</tr>
<tr>
<td>The Bond Buyer 816</td>
<td></td>
</tr>
<tr>
<td>BondLink 543</td>
<td></td>
</tr>
<tr>
<td>Bronner Group, LLC 537</td>
<td></td>
</tr>
<tr>
<td>BS&amp;A Software 516</td>
<td></td>
</tr>
<tr>
<td>Build America Mutual 211</td>
<td></td>
</tr>
<tr>
<td>CAFR-Online 425</td>
<td></td>
</tr>
<tr>
<td>California Society of Municipal Finance Officers (CSMFO) 715</td>
<td></td>
</tr>
<tr>
<td>CantorFitzgerald &amp; Co. 514</td>
<td></td>
</tr>
<tr>
<td>Caselle 406</td>
<td></td>
</tr>
<tr>
<td>CaseWare International, Inc. 649</td>
<td></td>
</tr>
<tr>
<td>CentralSquare Technologies 615</td>
<td></td>
</tr>
<tr>
<td>Certified Payments 413</td>
<td></td>
</tr>
<tr>
<td>Chandler Asset Management 213</td>
<td></td>
</tr>
<tr>
<td>CherryRoad Technologies, Inc. 226</td>
<td></td>
</tr>
<tr>
<td>Ciber Global 549</td>
<td></td>
</tr>
<tr>
<td>CityBase 444</td>
<td></td>
</tr>
<tr>
<td>ClearGov 218</td>
<td></td>
</tr>
<tr>
<td>Clearwater Analytics, LLC 526</td>
<td></td>
</tr>
<tr>
<td>ClientFirst Technology Consulting 632</td>
<td></td>
</tr>
<tr>
<td>Client Services, Inc. 800</td>
<td></td>
</tr>
<tr>
<td>CliftonLarsonAllen 745</td>
<td></td>
</tr>
<tr>
<td>Collaborative Solutions 726</td>
<td></td>
</tr>
<tr>
<td>Commerce Bank 808</td>
<td></td>
</tr>
<tr>
<td>Complus Data Innovations, Inc. 340</td>
<td></td>
</tr>
<tr>
<td>CORE Business Technologies 417</td>
<td></td>
</tr>
<tr>
<td>CPS Business Technologies 719</td>
<td></td>
</tr>
<tr>
<td>Crediton 654</td>
<td></td>
</tr>
<tr>
<td>Exhibitor</td>
<td>Booth</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-------</td>
</tr>
<tr>
<td>Crowe LLP</td>
<td>512</td>
</tr>
<tr>
<td>DAC Bond</td>
<td>335</td>
</tr>
<tr>
<td>Digital Designs, Inc.</td>
<td>702</td>
</tr>
<tr>
<td>eGov Strategies LLC</td>
<td>301</td>
</tr>
<tr>
<td>Ehlers</td>
<td>230</td>
</tr>
<tr>
<td>Empower Retirement</td>
<td>205</td>
</tr>
<tr>
<td>Enterprise Fleet Management</td>
<td>502</td>
</tr>
<tr>
<td>eTrak Recreation Software</td>
<td>704</td>
</tr>
<tr>
<td>F.H. Black &amp; Company Incorporated</td>
<td>640</td>
</tr>
<tr>
<td>FATHOM</td>
<td>725</td>
</tr>
<tr>
<td>Finite Matters Ltd.</td>
<td>506</td>
</tr>
<tr>
<td>FIS Global Payments</td>
<td>509</td>
</tr>
<tr>
<td>FISCAL Technologies</td>
<td>609</td>
</tr>
<tr>
<td>Fitch Ratings</td>
<td>117</td>
</tr>
<tr>
<td>Fixed Income Academy</td>
<td>706</td>
</tr>
<tr>
<td>Forecast5 Analytics, Inc.</td>
<td>304</td>
</tr>
<tr>
<td>FTN Financial</td>
<td>332</td>
</tr>
<tr>
<td>Gallagher</td>
<td>436</td>
</tr>
<tr>
<td>Galvanize</td>
<td>541</td>
</tr>
<tr>
<td>GovHR USA</td>
<td>527</td>
</tr>
<tr>
<td>Govolution</td>
<td>331</td>
</tr>
<tr>
<td>GovPay.net</td>
<td>848</td>
</tr>
<tr>
<td>GovSpend</td>
<td>748</td>
</tr>
<tr>
<td>GovTeller</td>
<td>505</td>
</tr>
<tr>
<td>Grant Street Group</td>
<td>312</td>
</tr>
<tr>
<td>Graviton Consulting Services</td>
<td>307</td>
</tr>
<tr>
<td>Gray CPA Consulting PC</td>
<td>528</td>
</tr>
<tr>
<td>Harmari STR</td>
<td>705</td>
</tr>
<tr>
<td>Harris ERP</td>
<td>540</td>
</tr>
<tr>
<td>Hawkins Delafield &amp; Wood, LLP</td>
<td>835</td>
</tr>
<tr>
<td>HCA Asset Management</td>
<td>133</td>
</tr>
<tr>
<td>HdL Companies</td>
<td>234</td>
</tr>
<tr>
<td>Highstreet</td>
<td>611</td>
</tr>
<tr>
<td>HilltopSecurities, Inc.</td>
<td>825</td>
</tr>
<tr>
<td>IC System</td>
<td>750</td>
</tr>
<tr>
<td>ICMA-RC</td>
<td>849</td>
</tr>
</tbody>
</table>
IGM Technology 432
IMS Infrastructure Management Services 511
Incapital 626
Infolob Solutions 707
Infor 317
Infosend, Inc. 524
Insight Investment 224
IntelliTime Systems Corporation 525
InterDev 624
Invoice Cloud, Inc. 328
ISG Public Sector 842
J.P. Morgan 854
Kamstrup Water Metering 131
KeyBanc Capital Markets 325
Kofax 833
Kronos 429
KUBRA 434
Laserfiche 753
LexisNexis Payment Solutions 709
LexisNexis Risk Solutions 530
Lincoln Financial Group 535
Linebarger Law Firm 628
Lumesis, Inc. 812
Markido, Inc. 410
MassMutual 544
Matrix Consulting Group 533
MAXIMUS Consulting Services, Inc. 606
Metaformers 600
Microsoft 517
Mitchell Humphrey & Co. 129
Moody's Investors Service 212
Morgan Stanley Investment Management 743
Multi-Bank Securities, Inc. 513
Municipal Securities Rulemaking Board (MSRB) 235
Municipal Services Bureau 604
MuniciPAY 701
<table>
<thead>
<tr>
<th>EXHIBITORS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Munite</td>
<td>341</td>
</tr>
<tr>
<td>MuniTemps Staffing</td>
<td>504</td>
</tr>
<tr>
<td>National Civic League</td>
<td>608</td>
</tr>
<tr>
<td>NBS</td>
<td>233</td>
</tr>
<tr>
<td>nCourt: Payments Made Easy</td>
<td>850</td>
</tr>
<tr>
<td>NCR Payment Solutions</td>
<td>749</td>
</tr>
<tr>
<td>Neighborly</td>
<td>405</td>
</tr>
<tr>
<td>Net Assets</td>
<td>736</td>
</tr>
<tr>
<td>Neubrain</td>
<td>741</td>
</tr>
<tr>
<td>NIC Services, LLC</td>
<td>840</td>
</tr>
<tr>
<td>NIGP</td>
<td>400</td>
</tr>
<tr>
<td>NorthStar Utilities Solutions</td>
<td>232</td>
</tr>
<tr>
<td>Norton Rose Fulbright US LLP</td>
<td>824</td>
</tr>
<tr>
<td>OneStream Software</td>
<td>751</td>
</tr>
<tr>
<td>OpenGov, Inc.</td>
<td>435</td>
</tr>
<tr>
<td>Opus21</td>
<td>732</td>
</tr>
<tr>
<td>Oracle</td>
<td>217</td>
</tr>
<tr>
<td>Panasonic</td>
<td>326</td>
</tr>
<tr>
<td>PARS</td>
<td>310</td>
</tr>
<tr>
<td>PayLocalGov</td>
<td>653</td>
</tr>
<tr>
<td>Payment Service Network, Inc.</td>
<td>610</td>
</tr>
<tr>
<td>Paymentus</td>
<td>735</td>
</tr>
<tr>
<td>PFM</td>
<td>225</td>
</tr>
<tr>
<td>Pinnacle Solutions, Inc.</td>
<td>801</td>
</tr>
<tr>
<td>Piper Jaffray</td>
<td>125</td>
</tr>
<tr>
<td>Plante &amp; Moran, PLLC</td>
<td>605</td>
</tr>
<tr>
<td>PMA Financial Network, Inc.</td>
<td>306</td>
</tr>
<tr>
<td>Point and Pay</td>
<td>336</td>
</tr>
<tr>
<td>Powerplan</td>
<td>551</td>
</tr>
<tr>
<td>Promontory Interfinancial Network, LLC</td>
<td>302</td>
</tr>
<tr>
<td>Public Risk Management Association</td>
<td>333</td>
</tr>
<tr>
<td>Public Trust Advisors</td>
<td>311</td>
</tr>
<tr>
<td>The Pun Group, LLP</td>
<td>713</td>
</tr>
<tr>
<td>Quatred, LLC</td>
<td>501</td>
</tr>
<tr>
<td>Questica Budget</td>
<td>101</td>
</tr>
<tr>
<td>Rahban CPA &amp; Consulting, Inc.</td>
<td>338</td>
</tr>
<tr>
<td>Company Name</td>
<td>Booth Number</td>
</tr>
<tr>
<td>--------------------------------------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Records Consultants, Inc.</td>
<td>430</td>
</tr>
<tr>
<td>Revize</td>
<td>407</td>
</tr>
<tr>
<td>RP Solutions</td>
<td>507</td>
</tr>
<tr>
<td>RPI Consultants</td>
<td>309</td>
</tr>
<tr>
<td>S&amp;P Global Ratings</td>
<td>555</td>
</tr>
<tr>
<td>SAFEChecks</td>
<td>119</td>
</tr>
<tr>
<td>SAP Concur</td>
<td>440</td>
</tr>
<tr>
<td>Sierra-Cedar</td>
<td>415</td>
</tr>
<tr>
<td>SoftResources, LLC</td>
<td>412</td>
</tr>
<tr>
<td>Software Solutions, Inc.</td>
<td>441</td>
</tr>
<tr>
<td>Sourcewell</td>
<td>837</td>
</tr>
<tr>
<td>Springbrook Software</td>
<td>752</td>
</tr>
<tr>
<td>Stantec Consulting Services, Inc.</td>
<td>300</td>
</tr>
<tr>
<td>SymPro Software (a division of Emphasys Software)</td>
<td>629</td>
</tr>
<tr>
<td>Teller</td>
<td>731</td>
</tr>
<tr>
<td>TIAA</td>
<td>343</td>
</tr>
<tr>
<td>Tidal Basin</td>
<td>734</td>
</tr>
<tr>
<td>TimeClock Plus</td>
<td>209</td>
</tr>
<tr>
<td>Tyler Technologies</td>
<td>105</td>
</tr>
<tr>
<td>UMB Bank</td>
<td>401</td>
</tr>
<tr>
<td>U.S. Bank</td>
<td>113</td>
</tr>
<tr>
<td>University of Georgia</td>
<td>717</td>
</tr>
<tr>
<td>Vining Sparks</td>
<td>308</td>
</tr>
<tr>
<td>Virginia Tech-Center for Public Administration &amp; Policy</td>
<td>500</td>
</tr>
<tr>
<td>VISA</td>
<td>305</td>
</tr>
<tr>
<td>Voya Financial</td>
<td>427</td>
</tr>
<tr>
<td>Water Company of America</td>
<td>724</td>
</tr>
<tr>
<td>Workday</td>
<td>449</td>
</tr>
<tr>
<td>Workiva</td>
<td>636</td>
</tr>
<tr>
<td>Xpress Bill Pay</td>
<td>404</td>
</tr>
<tr>
<td>Xylem, Inc.</td>
<td>844</td>
</tr>
<tr>
<td>Zobrio</td>
<td>648</td>
</tr>
</tbody>
</table>
GFOA wishes to express its appreciation to the following sponsors:

### DIAMOND SPONSOR
- **ICMA-RC** for delegate bags, cyber café, and general support

### GOLD SPONSORS
- **Oracle** for delegate lanyards and general support
- **Empower Retirement** for WiFi access and general support
- **Infor** for water bottles and general support
- **Stifel** for general support
- **Tyler Technologies** for Monday snacks and general support
- **U.S. Bank** for general support

### SILVER SPONSORS
- **PFM** for guest lanyards and bags
- **Workiva** for Monday coffee, Tuesday snacks, and general support
- **Amazon Web Services** for general support
- **AXA** co-sponsorship of charging stations, Sunday snacks, and general support
- **Bank of America Merrill Lynch** for general support
- **Discover Los Angeles** for Welcome Breakfast coffee
- **Fitch Ratings** for general support
- **KeyBanc Capital Markets** for general support
- **MUFG Union Bank, N.A.** for Tuesday coffee and general support
- **Piper Jaffray** for general support
- **VISA** for co-sponsorship of charging stations
- **Wells Fargo** for general support

### BRONZE SPONSORS
- **Segal Consulting** for Women’s Public Finance Network Luncheon
- **BKD, LLP** for co-sponsoring the Black Caucus Networking Event and general support
- **AIG Retirement Services** for general support
- **Alvarez and Marsal** for general support
- **American Express** for general support
- **George K. Baum** for general support
- **BNY Mellon** for general support
- **CAFR-Online** for general support
- **CentralSquare Technologies** for general support
- **Chandler Asset Management** for general support
- **CPS Payment Services** for general support
CONFERENCE SPONSORS

- **Freeman** for general support
- **J.P. Morgan** for general support
- **MFOA of Ontario** for support of the Canadian Reception
- **Moody's Investors Services** for general support
- **Stern Brothers** for general support

FRIENDS OF GFOA

- **nCourt** for co-sponsorship of charging stations
- **Loop Capital Markets** for co-sponsoring the Black Caucus Networking Event
- **Build America** for general support
- **Huntington Bank** for general support
- **Backstrom McCarley Berry & Co., LLC** for co-sponsoring the Black Caucus Networking Event
- **Bremer Bank** for general support
- **Bronner Group LLC** for general support
- **Canadian Association of Government Finance Officers** for support of the Canadian Reception
- **FISCAL Technologies** for general support
- **GFOA of British Columbia** for support of the Canadian Reception
- **Lumesis, Inc.** for general support
- **Mastercard** for general support
- **Meeder Investment Management** for general support
- **MGO** for general support
- **OpenGov** for general support
- **Loop Capital Markets** for co-sponsoring the Black Caucus Networking Event
- **Point and Pay** for general support
- **The Pun Group, LLP** for general support
- **RSM** for general support

SUPPORTERS

- **PARS** for general support
- **SAFEChecks** for general support
2019 AWARDS FOR EXCELLENCE WINNERS

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 entities received the Award for Excellence in 2019. Samples of the winning submissions will be available on GFOA’s website after the conference.

Awards Given for Exceptionally Well-Implemented GFOA Best Practice

City of Colwood, British Columbia, CA
Sustainable Infrastructure Replacement Plan

East Bay Municipal Utility District, Oakland, CA
Capital vs Operating: Decisions for the Non-Accountant

City of Kansas City, MO
The Public Improvements Advisory Committee on the City of Kansas City’s Capital Improvements Program

City of La Quinta, CA
General Fund Balance and Reserves Policy

City of Raleigh, NC
Online Calculator for Development Services Fees

City of Roseville, CA
EngageRoseville

West Metro Fire Protection District, Lakewood, CO
Fund Balance Guidelines for the General Fund

City of Winnipeg, Manitoba, CA
Capital Projects Dashboard
**GFOA FIRST ANNUAL HERO AWARD RECIPIENTS**

The GFOA Hero Award recognizes finance officers who have demonstrated extraordinary actions during a time of crisis. We are proud to announce the following individuals as recipients of the inaugural award:

**Scott Dowell**, Administrative Services Director, City of Chico, CA

**Fred James**, Deputy Director/CFO, Las Vegas–Clark County Library District, Las Vegas, NV

**Maggie Keenan**, Director–OBM, Cuyahoga County, Cleveland, OH

**Christopher McCullion**, CFO, City of Orlando, FL
GFOA 2019 SCHOLARSHIP RECIPIENTS

GFOA offers academic scholarships on an annual basis. The 2019 recipients are as follows:

Goldberg-Miller Public Finance
Funded by the Girard Miller Foundation
Julie A. Wons, Elgin Community College, Elgin, IL

Frank L. Greathouse Government Accounting
Funded by Government Finance Officers Association
Carmen Coniglio, Louisiana State University–Shreveport, Shreveport, LA
Svetlana Ries, St. Leo University, St. Leo, FL

Minorities in Government Finance
Funded by Government Finance Officers Association
Vania Brown, University of Illinois at Urbana Champaign, Urbana-Champaign, IL

Government Finance Professional Development
Funded by the Government Finance Officers Association Scholarship Reserve
Susana Arroyo, Northern Illinois University, DeKalb, IL
Teresa Emrich, Highlands University, Las Vegas, NM
Natalie Simon, Florida International University, Miami, FL
Stacey Wilkes, University of Lynchburg, Lynchburg, VA

Jeffrey L. Esser Career Development
Funded by Government Finance Officers Association
Jill Bauer, Lansing Community College, Lansing, MI
Vickie Blackden, Southern New Hampshire University, Manchester, NH
Melissa Dunbar, Upper Iowa University, Fayette, IA
GFOA'S 20,000th MEMBER RECOGNITION

We reached a milestone in GFOA history—20,000 members. Congratulations to GFOA's 20,000th Member:

Carol Orth, Assistant Controller, Alameda County–Auditor’s Agency, Oakland, CA

THANK YOU for your commitment to GFOA and for continuing to introduce your colleagues to GFOA.

If you're not a GFOA member, go to gfoa.org/join for more information and an application.

Add members to your government's existing membership by e-mailing membership@gfoa.org.
LOCAL CONFERENCE COMMITTEE

GFOA extends a gracious thank you to the members of the Los Angeles Local Conference Committee who donated both time and effort to general preparations. The conference would not be a success without their generous support.

**Chair**
Ron Galperin, Controller, City of Los Angeles, CA

**Members**
Debby Cherney, CEO, San Bernardino County Employees’ Retirement Association (SBCERA), San Bernardino, CA
Chris Concepción, Director of Government Affairs, City of Los Angeles, CA
Melissa Dixon, Executive Director, California Society of Municipal Finance Officers, Sacramento, CA
Margaret Moggia, Chief Financial Officer, West Basin Municipal Water District, Carson, CA
Brandy Thigpen, Director, Client Services, Discover Los Angeles, Los Angeles, CA

About GFOA

Government Finance Officers Association (GFOA), founded in 1906, represents public finance officials throughout the United States and Canada. The association’s more than 20,300+ 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.

**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.

GFOA is headquartered in Chicago with offices in Washington, D.C. The association staff is organized as follows:
Office of the Executive Director and Financial Administration

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)

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

Federal Liaison

Federal Liaison informs GFOA members about federal legislation, regulations, judicial actions, and policies that affect public finance functions, and represent the interests of 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. Staff also collects, analyzes, and disseminates information to GFOA members about Washington activities. Additionally, by developing and promoting best practices and policy statements, Federal Liaison helps GFOA members and public finance professionals enhance their operations. Staff coordinates the efforts of GFOA’s seven standing committees, the Women’s Public Finance Network, and the Black Caucus. (Washington, D.C.)

Operations and Marketing

It is the responsibility of Operations and Marketing to handle all logistics and marketing for the association’s training programs—including the Annual Conference, national training, web streaming events, internet training, and committee meetings. Through marketing and advertising, Operations and Marketing promotes membership in the association, participation in the Annual Conference, training events held throughout the year, publications, and the association’s awards programs. Staff also manages administration for the association. (Chicago)
Research and Consulting
GFOA’s Research and Consulting Center (RCC) is nationally recognized for its analytical and advisory services, as well as for research on issues specific to state and local government. RCC has built a reputation as the unparalleled leader in the field of providing objective, independent advice for ERP procurement and implementation projects focusing on business process improvement, governance, and serving as an advocate for best practices in financial, human resource, procurement, payroll and operational management. GFOA also provides services related to long-term financial planning, financial policy development, and analysis of reserve levels using a risk-based approach. In addition, RCC staff leads GFOA’s Financial Foundations Framework, coordinates the Alliance for Excellence in School Budgeting, produces Government Finance Review, staffs many of GFOA’s committees and training programs, and completes practitioner-based research on topics related to budgeting practices, financial leadership, ethics, and financial transparency. (Chicago)

Technical Services
Staff provides technical information, products, and services to GFOA members and others interested in governmental accounting, auditing, financial reporting, and the preparation of state and local government budget documents. At the heart of Technical Services’ activities are professional recognition programs: the Certificate of Achievement for Excellence in Financial Reporting Program, the Distinguished Budget Presentation Awards Program, the State Budget Award Program, the Canadian Award for Financial Reporting Program, and the Popular Annual Financial Reporting Award Program. Technical Services 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 the application of best practices in accounting and budgeting. Members of the TSC staff also serve as authors of publications and periodicals, prepare educational materials, and serve as instructors in numerous national training seminars, including internet and web stream events. (Chicago)
GFOA EXECUTIVE BOARD


Steven Gibson, President
Deputy City Manager, City of Rock Hill, SC

Patrick J. McCoy, Past President
Director of Finance, Metropolitan Transportation Authority, New York, NY

Terry S. Stone, President-Elect
Assistant Superintendent for Business and Operations, Hanover County Public Schools, Ashland, VA

Catherine J. Brubacher, General Manager of Corporate Services and City Treasurer, City of Brantford, ON

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

Veronica A. Carrillo, Fiscal Administrator, City of San Antonio, TX

Debby Cherney, CEO, San Bernardino County Employees’ Retirement Association (SBCERA), San Bernardino, CA

Gary Donaldson, Chief Financial Officer, Orange County, Hillsborough, NC

Cynthia Evangelisti, Treasurer, Chicago Park District, Chicago, IL
Marion M. Gee, Finance Director, Metropolitan St. Louis Sewer District, St. Louis, MO

Merrill Shepherd King, Finance Director/Treasurer, City of Minnetonka, MN

Dawn Lang, Management Services Director, City of Chandler, AZ

Amelia Clark Merchant, Director of the Department of Finance, City of Roanoke, VA

James M. Nicholson, Director of Finance, City of Pataskala, OH

Diane Reichard, Chief Financial Officer, City of Plant City, FL

Andrew Scott, Deputy Chief Operating Officer, METRO, Portland, OR

Tina Tapley, Director of Finance, Innovation & Technology/ City Treasurer, City of Fredericton, NB

Terri Velasquez, Director of Finance, City of Aurora, CO

Chris Morrill, Executive Director/CEO, GFOA, Chicago, IL
Honorary Members
Alfred D. Bricker, Wayne County, MI
Jeffrey L. Esser, Executive Director Emeritus, Chicago, IL
Stephen J. Gauthier, Wheaton, IL
Betty Jo Harker, Ames, IA
Girard Miller, Santa Ana, CA
Gary R. Norstrom, Saint Paul, MN

Executive Offices
203 North LaSalle Street, Suite 2700
Chicago, IL 60601-1210
Tel: (312) 977-9700
Fax: (312) 977-4806
E-mail: Inquiries@gfoa.org
www.gfoa.org

GFOA STAFF

Chicago, Illinois Office

Office of the Executive Director
Christopher P. Morrill, Executive Director/CEO
Beth Aldana, Manager of HR and Organizational Development
Timothy Martin, Senior Manager for Member Engagement

Financial Administration
John F. Jurkash, Director/Chief Financial Officer
Gus Corral, Publications Distribution Coordinator
Derek Czaplewski, Assistant Member Services Coordinator
Erica Huddle, Member Services Coordinator
Sarah Mars, Member Services Coordinator
Joseph McCauley, Accounting Clerk
Dennis Podgorski, IT Manager
Ben Walker, Web Administrator

Operations and Marketing
Barbara G. Mollo, Director
Deborah E. Boyd, Senior Receptionist
Adam Braffman, Manager
Natalie Laudadio, Senior Communications Manager
Raymond Matos, Jr., Shipping and Receiving Clerk
Kate Southard, Manager
Dan Zielinski, Assistant Director
Research and Consulting
Michael J. Mucha, Director/Deputy Executive Director
Chloe Belczak, Program Associate
Marcy Boggs, Managing Editor
Matt Bubness, Senior Manager
Genevieve Carter, Consultant/Analyst
Elizabeth Fu, Senior Manager
Susan Gaffney, Senior Manager
Shayne Kavanagh, Senior Manager—Research
Jake Kowalski, Consultant/Analyst
Ryan Lawler, Senior Manager
Craig Lesner, Senior Manager
Katie Ludwig, Senior Manager
Mark Mack, Manager
Barry McMeekin, Consulting Practice Manager
Eva Olsaker, Senior Manager
Rob Roque, Technology Services Manager
Ailene Upton, Executive Administrative Assistant

Technical Services
Michele Mark Levine, Director
Todd Buikema, Assistant Director for Publications
James Falconer, Senior Manager
John Fishbein, Senior Program Manager
Tami Garrett, Administrative Associate
Diane Griffin, Assistant Director for Awards Programs
Peg Hartnett, Assistant Director for Training
Jay Howard, Senior Program Associate
Zhikuan Hu, Manager
Kim Hua, Program Associate
Quijian Jiang, Manager
Tahrer Khalil, Program Associate
Robert Kotchen, Administrative Assistant
Zaklina Lakic, Program Associate
Jim Phillips, Senior Program Manager
Delores Smith, Administrative Associate
Dashaunta Waddell, Administrative Associate
Qun (Tren) Wang, Manager

Washington, D.C.
Federal Liaison
Emily Swenson Brock, Director
Michael Belarmino, Senior Policy Advisor
Michael Thomas, Federal Policy Associate
1903 Washington, D.C.: Meeting with Census Bureau Officials
1906 Washington, D.C.: Meeting with Census Bureau Officials
1906 Chicago, IL: *S.B. Williams*, Rochester, NY
1907 Richmond, VA: *Louis Betz*, St. Paul, MN
1909 Detroit, MI: *Alonzo Tweedale*, District of Columbia
1912 Buffalo, NY: *Samuel M. Wilhite*, Louisville, KY
1913 Chattanooga, TN: *Samuel M. Wilhite*, Louisville, KY
1914 Milwaukee, WI: *Edward S. Osborne*, Rochester, NY
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
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
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
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

*Deceased*
<table>
<thead>
<tr>
<th>Year</th>
<th>Location</th>
<th>Past President</th>
</tr>
</thead>
<tbody>
<tr>
<td>1947</td>
<td>New York, NY</td>
<td><em>Joseph M. Lowery, Los Angeles County, CA</em></td>
</tr>
<tr>
<td>1948</td>
<td>Denver, CO</td>
<td>*C.L. Beazley, Province of Nova Scotia</td>
</tr>
<tr>
<td>1949</td>
<td>Detroit, MI</td>
<td>*Joseph F. Clark, Wildwood, NJ</td>
</tr>
<tr>
<td>1950</td>
<td>Montreal, QB</td>
<td>*Lionel G. Ott, New Orleans, LA</td>
</tr>
<tr>
<td>1951</td>
<td>Dallas, TX</td>
<td>*L. Roberge, Montreal, QB</td>
</tr>
<tr>
<td>1952</td>
<td>Boston, MA</td>
<td>*E. Lynn Crossley, Dallas, TX</td>
</tr>
<tr>
<td>1953</td>
<td>Miami, FL</td>
<td>*John McQuilken, San Diego, CA</td>
</tr>
<tr>
<td>1954</td>
<td>San Francisco, CA</td>
<td>*Frank R. Hanrahan, Cleveland, OH</td>
</tr>
<tr>
<td>1955</td>
<td>New Orleans, LA</td>
<td>*A.A. Weinberg, Chicago, IL</td>
</tr>
<tr>
<td>1956</td>
<td>Washington, D.C.</td>
<td>*Charles L. Mathews, Atlanta, GA</td>
</tr>
<tr>
<td>1957</td>
<td>St. Paul, MN</td>
<td>*George N. Shaw, Miami, FL</td>
</tr>
<tr>
<td>1958</td>
<td>Milwaukee, WI</td>
<td>*James H. Lowther, Ottawa, ON</td>
</tr>
<tr>
<td>1959</td>
<td>Montreal, QB</td>
<td>*Eugene A. Mintkeski, Port Authority of NY</td>
</tr>
<tr>
<td>1961</td>
<td>Seattle, WA</td>
<td>*Fred W. Lawrence, San Diego, CA</td>
</tr>
<tr>
<td>1962</td>
<td>Boston, MA</td>
<td>*John L. Williams, Phoenix, AZ</td>
</tr>
<tr>
<td>1963</td>
<td>Detroit, MI</td>
<td>*Robert E. Develle, New Orleans, LA</td>
</tr>
<tr>
<td>1964</td>
<td>Dallas, TX</td>
<td>*Leland M. Romkey, Halifax, NS</td>
</tr>
<tr>
<td>1965</td>
<td>Philadelphia, PA</td>
<td>*C.F. Craig, Dallas, TX</td>
</tr>
<tr>
<td>1966</td>
<td>San Diego, CA</td>
<td>*Fred L. Schneider, Columbus, OH</td>
</tr>
<tr>
<td>1967</td>
<td>Chicago, IL</td>
<td>*Louis G. Basso, Wayne County, MI</td>
</tr>
<tr>
<td>1968</td>
<td>New Orleans, LA</td>
<td>*Nathan J. Sindelar, Moraga, CA</td>
</tr>
<tr>
<td>1969</td>
<td>Toronto, ON</td>
<td>*Otto H. Loser, Chicago, IL</td>
</tr>
<tr>
<td>1970</td>
<td>Miami Beach, FL</td>
<td>*Joe E. Torrence, Nashville &amp; Davidson County, TN</td>
</tr>
<tr>
<td>1971</td>
<td>New York, NY</td>
<td>*John H. Poelker, St. Louis, MO</td>
</tr>
<tr>
<td>1972</td>
<td>Denver, CO</td>
<td>*Elmer A. Johnson, Denver, CO</td>
</tr>
<tr>
<td>1973</td>
<td>Kansas City, MO</td>
<td>*John M. Urie, Kansas City, MO</td>
</tr>
<tr>
<td>1974</td>
<td>Las Vegas, NV</td>
<td>*S. Grady Fullerton, Harris County, TX</td>
</tr>
<tr>
<td>1975</td>
<td>Montreal, QB</td>
<td>*Alfred D. Bricker, Wayne County, MI</td>
</tr>
<tr>
<td>1976</td>
<td>San Francisco, CA</td>
<td>*Lennox L. Moak, Philadelphia, PA</td>
</tr>
<tr>
<td>1977</td>
<td>Atlanta, GA</td>
<td>*Charles L. Davis, Atlanta, GA</td>
</tr>
<tr>
<td>1978</td>
<td>Houston, TX</td>
<td>*Clark Burrus, Chicago, IL</td>
</tr>
<tr>
<td>1979</td>
<td>Detroit, MI</td>
<td>*Carl V. Husby, Jr., Long Beach, CA</td>
</tr>
<tr>
<td>1980</td>
<td>Phoenix, AZ</td>
<td>*Fernand Denis, Montreal, QB</td>
</tr>
<tr>
<td>1981</td>
<td>Boston, MA</td>
<td>*William J. Reynolds, Greenwich, CT</td>
</tr>
<tr>
<td>1982</td>
<td>New Orleans, LA</td>
<td>*Jim C. Kirkland, Tallahassee, FL</td>
</tr>
<tr>
<td>1983</td>
<td>Toronto, ON</td>
<td>*Carl L. White, San Antonio, TX</td>
</tr>
<tr>
<td>1984</td>
<td>San Antonio, TX</td>
<td>*Arthur A. Blumenfeld, Albuquerque, NM</td>
</tr>
<tr>
<td>1985</td>
<td>Chicago, IL</td>
<td>*John T. Walsh, Hartford, CT</td>
</tr>
</tbody>
</table>

*Deceased
1986 Los Angeles, CA: **Betty Jo Harker**, Ames, IA  
1988 Atlanta, GA: **Frank L. Greathouse**, Nashville, TN  
1989 Seattle, WA: **Virginia Rutledge**, Ludlow, MA  
1992 Orlando, FL: **John L. Pickard**, Toronto, ON  
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  
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**, City of 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, MD  
2014 Minneapolis, MN: **Robert W. Eichem**, City of Boulder, CO  
2015 Philadelphia, PA: **Heather A. Johnston**, City of Burnsville, MN  
2016 Toronto, ON: **Marc Gonzales**, Clackamas County, OR  
2017 Denver, CO: **Patrick J. McCoy**, Metropolitan Transportation Authority, NY  
2018 St. Louis, MO: **Steven Gibson**, Deputy City Manager, City of Rock Hill, SC

*Deceased*
1. Luxe City Center Hotel
   1020 S. Figueroa St.
   (213) 748-1291

2. JW Marriott Los Angeles L.A. Live
   900 W. Olympic Blvd.
   (213) 765-8600

3. Courtyard Marriott L.A. Live
   901 W. Olympic Blvd.
   (213) 443-9222

4. Residence Inn by Marriott L.A. Live
   901 W. Olympic Blvd.
   (213) 443-9200

5. Hotel Figueroa
   939 S. Figueroa St.
   (866) 734-6018

6. Hotel Indigo Los Angeles Downtown
   899 Francisco St.
   (213) 232-8800

7. InterContinental Los Angeles Downtown
   900 Wilshire Blvd.
   (213) 688-7777

8. Sheraton Grand Los Angeles
   711 S. Hope St.
   (213) 488-3500

9. The Standard, Downtown L.A.
   550 S. Flower St.
   (213) 892-8080

10. Westin Bonaventure
    404 S. Figueroa St.
    (213) 624-1000

11. The Freehand Hotel & Hostel
    416 W. 8th St.
    (213) 612-0021

12. The L.A. Grand Hotel Downtown
    333 S. Figueroa St.
    (213) 617-1133

13. Millennium Biltmore
    506 S. Grand Ave.
    (213) 624-1011

14. Omni Los Angeles
    251 S. Olive St.
    (213) 617-3300

For housing issues booked through Experient
(GFOA’s official vendor), please call (303) 405-7882.

L.A. Live: site of Microsoft Theater, Tuesday Closing Event
SAVE THE DATE!

Government Finance Officers Association

GFOA’s 114th Annual Conference

Ernest N. Morial Convention Center

New Orleans, Louisiana

May 17-20, 2020

Registration will open in the Fall

GFOA.org #GFOA2020
114th Annual Conference
New Orleans, Louisiana  • May 17–20, 2020
Ernest N. Morial Convention Center
Registration details will be available in the fall.

115th Annual Conference
Hyatt Regency & Swiss Hotel Chicago
Chicago, Illinois  • June 27–30, 2021

116th Annual Conference
Neal Kocurek Memorial Austin Convention Center
Austin, Texas  • June 5–8, 2022

117th Annual Conference
Oregon Convention Center
Portland, Oregon  • May 21-24, 2023

118th Annual Conference
Orange County Convention Center
Orlando, Florida  • June 9-12, 2024

119th Annual Conference
Walter E. Washington Convention Center
Washington, D.C.  • June 29-July 2, 2025

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