



2016-2017 Local Chapter Final Reports

Big Bend Chapter

Debbie White, Chapter President

The Big Bend Chapter held four quarterly luncheon meetings during the 2016-17 fiscal year. The Continuing Professional Education (CPE) topics presented at these meetings were: (1) Impending Florida Constitutional Review; (2) Accounting for Capital Assets; (3) Public Records 101 – Public Records Requests and Legislation; and (4) GASB Update and New Uniform Guidance.

At the Annual Business Meeting held this year on May 18, 2017, the following officers and director were elected by the Chapter membership to serve during the 2017-18 fiscal year:

- **President** - Greg James, Wakulla County Clerk of Courts
- **President-Elect** - Jordan Steffens, Leon County Clerk of Courts & Comptroller
- **Treasurer** - Mike Gomez, Florida Auditor General
- **Secretary** - Don Hancock, City of Tallahassee
- **Director** - Susan Lincoln, Florida Department of Economic Opportunity

The Big Bend Chapter currently has 83 members. Current membership expires on June 30, 2017, so it's time to renew your membership. Membership dues are \$20, except for students whose membership is free.

On behalf of the Board members and membership of the Big Bend Chapter, I would like to express our appreciation to all of the speakers this year for their time and effort to present the educational seminars and support our Chapter. In addition, I would like to thank the current Board members for their service to the Chapter and all of our Chapter membership for their support this year. It has been a privilege to serve on the Board for the past few years and to serve as Chapter President for the 2016-17 fiscal year.

Central Florida Chapter

Jason Loschiavo, Chapter President

The Central Florida Chapter had a busy year providing several opportunities for CPE credits and networking. Some of the topics covered included debt management, cloud computing, risk management, health insurance, accounting and fraud topics, disaster recovery, and more. In all, 23 hours of CPE credits were available over five meetings. In addition, we approved our FY'18 budget, elected our FY'18 slate of officers, and raffled off fun prizes. Thank you to our speakers, our board, and our members for a great year!

Florida First Coast Chapter

Julio Lacayo, Jr., Chapter President

As this fiscal year draws to a close, we want to thank all of our volunteers who make this Chapter special. The board and membership of the Chapter wishes to extend our gratitude to all of our speakers for their time and effort in providing these educational and informative seminars. Our meetings are successful because of the support from the speakers and their organizations.

During the year we faced many changes to our leadership within our chapter with Devin Carter (Treasurer) and Carolyn Parker (Director) stepping down to pursue other career opportunities. Michelle Begley has graciously accepted to continue as our Secretary and continues to perform an excellent job of keeping the rest of our Chapter informed and engaged.

Special thanks and appreciation go to our Directors, Anthony Cobb, Elly Gumera and Carolyn Parker for their contributions of locating speakers and meeting venues to keep our members informed and fed. We celebrated the retirement of longtime director Elly Gumera and wish him and his family much success as they travel the world.

Our annual meeting is scheduled for June 19, 2017 at Maggiano's in the Towncenter area in Jacksonville where we welcomed Mr. Darryl Ott, CPA who spoke about Ethics - CPA's Doing the Right Thing. During the meeting, we installed our President, Melissa Burns, and offered the following slate of candidates for election for the 2017-18 fiscal year:

President-Elect: Judith Garrard, City of Jacksonville

Secretary: Michelle Begley, Duval County Public Schools

Treasurer: Bella Basilio, City of Jacksonville

Director: Anthony Cobb, Duval County Public Schools

Director: Robyn Lawrence, City of Jacksonville

Director: Kathleen Collins, Office of the Property Appraiser

Current membership expires on June 30, 2017. Remember to renew your membership; Active membership dues are \$20, associate membership dues are \$25, and student and retired members are FREE.

Gulf Coast Chapter

Anne Lawler, Chapter President

The Gulf Coast chapter of the FGFOA wrapped up our fiscal year with the Chapter annual meeting held on June 8th, 2017 at Bascom's Chop House in Clearwater. The Officers and Directors for FY 2017-2018 were elected at that time. There was one opening for a Director position. An election was held between two interested candidates. The results of that election were announced the day after the annual meeting.

The candidate who did not win election onto the Board has agreed to head up a Web Committee for the Chapter. The purpose of this committee is to facilitate our organization's efforts to provide more services on-line. The use of PayPal this past year has proven to be a cost and time savings to our Treasurer and members. We want to further this by providing on-

line services such as renewing memberships, registering for conferences and luncheons, paying for those items, obtaining CPE certificates and a library for presentations.

Our 2016-17 year included hosting two one-day CPE conferences and three luncheon business meetings.

Our Fall Conference was held in October at Pinellas County Cooperative Extension. This is an annual event offering 8 hours of CPE credits. This year we hosted 67 attendees. Due to the approach of Hurricane Matthew on the day of our conference, there were last minute changes to our topics and speakers. Our speakers and their topics were Andrew Laflin, CPA, CliftonLarsonAllen doing double duty speaking on “Fraud” and “Best of Accounting for Complexities Facing Local Governments;” Jim Scull, Purchasing Manager, Procurement Card Services, University of South Florida presenting “PCard Operations in the Public Sector: PCard Services at the University of South Florida; and Piotr Krekora and Pete Strong, Gabriel Roeder Smith & Company spoke on “More of the Same . . . Are You Ready for GASB 74 and 75?.”

In February, we held our Winter Investment Conference in the Jenkins Room at the Largo Library. There were 65 in attendance. This conference is an annual event specifically geared towards investments and offers 8 hours of Investment CPE. Our presenters included Greg Holden and Chris McAvoy from Manning & Napier, Thomas Tight from Public Trust Advisors, Andrew Laflin of CliftonLarsonAllen, Richard Pengelly from PFM Asset Management LLC and David Jang with Wertz Capital Advisors. The conference was well received and serves as an economical way for meeting investment education requirements.

Ken Burke, Pinellas County Clerk of the Circuit Court and Comptroller was the speaker at our luncheon held on December 08, 2016 at Bascom’s Chop House in Clearwater. He spoke on Leadership to the 85 members that were in attendance. It was a very inspirational session that was enjoyed by all who attended.

Andrew Burnham, Director of Financial Services Practice for Stantec presented “Sustainable Rate & Financial Practices” which offered some insight on utility pricing trends and average costs across the United States. This luncheon was held at Bascom’s Chop House on April 20, 2017 with 68 attendees!

Patti Graganella, Chief Administrative Officer for the Florida League of Cities spoke at our annual chapter meeting on June 8, 2017 at Bascom’s Chop House. There were 59 members in attendance. She spoke on “Best Practices in Hiring and Interviewing People.” It was an interactive session with many questions from those in attendance.

Following is the list of Officers and Directors for the 2017-2018 fiscal year as approved by members in attendance at the June 8, 2017 annual meeting:

- **President:** Linda Benoit – Pinellas County Office of Management & Budget
- **President-Elect:** Cindy Nenno – City of Oldsmar
- **Secretary:** Joe Ciarro – City of Dunedin
- **Treasurer:** Amy Ratliff – City of Oldsmar

- **Director:** Lynn De la Torre – Juvenile Welfare Board of Pinellas County
- **Director:** Justin Grant – Pasco County
- **Director:** Brett Allmond – Pinellas County Clerk of the Circuit Court & Comptroller
- **Ex-Officio Member:** Anne Lawler – Pinellas County Clerk of the Circuit Court & Comptroller

The Gulf Coast Chapter currently has 168 members.

Nature Coast Chapter

Olga Rabel, Chapter President

The Nature Coast Chapter had a very busy year: membership met for three half-day educational seminars learning about various topics on finance and accounting, budgeting, debt management and investments. In December 2017, the Chapter hosted their annual Christmas Luncheon with Nicole Gasparri, Organizational Program Manager from the City of Boca Raton, as a guest speaker. The presentation talked about managing stress during holidays season by balancing work and family and still making a difference during this meaningful time of the year. Annual April One-Day Conference brought in an array of different speakers with topics ranging from personal development to professional technical issues and updates on current economy. This year the Chapter purchased its own projector and laptop that allowed seamless preparation for the sessions for Chapter's Program Director and speakers.

Palm Beach Chapter

Rebecca Pine, Chapter President

This has been a great year for the Palm Beach Chapter. We have 230 members (206 active; 22 associate; 2 students). We launched our Facebook page and implemented our new website (www.pbcfgfoa.org) and membership management software, WildApricot.

On April 6, 2017, the Palm Beach Chapter of the FGFOA co-sponsored the Palm Beach County Government Bee. The government bee was started last year by the Masonic High Twelve Lake Worth Club and the Palm Beach County School Board to encourage high school students to learn more about government. The Chapter's support helped double the number of schools participating. Forty-two students on nine teams from seven schools participated this year. The winner was Seminole Ridge High School with Suncoast High School coming in 2nd and Royal Palm Beach High School 3rd.

Our annual business meeting was held on April 12, 2017. The topic was Public Fraud & Corruption was presented in a panel discussion format. We had over 50 members in attendance. In addition to the presentation, revised by-laws were approved as well as the following slate of candidates for the 2017/2018 year:

- President: Jeremy Baker - PBC Office of Financial Management and Budget
- President Elect: Leslie Harmon - City of Boca Raton
- Treasurer: Katie Roundtree - Northern Palm Beach County Improvement District

- Secretary: Ryan Ralph - City of Boca Raton
- Director: Julie Dowe - PBC Department of Community Services
- Director: Jeanette Haynes - City of West Palm Beach
- Director: Nicholas Kelly - City of Boca Raton

Our final meeting for this year was held on Thursday, June 15, 2017. Our guest speaker was Dorothy Jacks, Palm Beach County Property Appraiser and we had 63 members in attendance.

Additionally, the following seminars were held this year:

- 8/19/2016 Sales Tax Oversight Seminar
- 10/17/2016 GASB Seminar
- 1/26/2017 GASB 75 Seminar
- 2/16/2017 Annual Investment Seminar Presented by Wertz York
- 3/31/2017 Joint Meeting with local Internal Auditor Chapter

South Florida Chapter

Emilie Smith, Chapter President

The South Florida Chapter had a busy year beginning with the hosting of an 8-hour Annual Finance and Investment Seminar that was held on August 18th. The event was a huge success with about 100 people in attendance! We had speakers travel from across the country to provide this outstanding training to our members! We hosted a training in October featuring Shelia Jones, Senior Auditor with the City of Orlando Office of Audit Services and Management Support, who spoke about Revenue Audits. We also hosted our first 4-hour Ethics Training, designed for CPAs, and coordinated through the Florida Institute of CPAs (FICPA). The training hosted 41 attendees at the City of Sunrise Civic Center. We also had a very successful January networking event that had 81 participants. This was an evening event, held in downtown Fort Lauderdale. The event included dinner, dancing, networking and a cruise along the Intracoastal Waterway.

On March 9th, we held a 3-hour investment training and attendees enjoyed a wonderful lunch buffet with three engaging speakers. Following this training, we had our Annual Meeting in April and our final meeting on June 15th which included the new Board swearing in. We presently have 219 members to date and growing! We are an active group and always looking for more ways to educate our members and encourage opportunities for information sharing and networking.

Space Coast Chapter

Sondra D'Angelo, Chapter President

The Space Coast Chapter offered two four-hour workshops, and an annual business meeting. The first of our workshops was on June 24, 2016. Topics and speakers included:

- Trends in Electronic Banking and Combating Fraud, Mary Harrington, SunTrust Bank
- Update on Best Practices in Automated Payables Processes, Brian Gomes, SunTrust Bank

- “Getting Your Money’s Worth” Construction Contract Risk & Fiscal Management, Rob Broline, Carr, Riggs & Ingram LLC

Our October 21, 2016 workshop topics and speakers included:

- Market and Economic Review, Scott Stitcher, PFM Asset Management LLC
- GASB Update 72 & 79, Debra Goodnight, PFM Asset Management LLC
- GASB Update, Yvonne Clayborne, Carr, Riggs & Ingram LLC

Our annual Christmas party was held on December 9, 2016 at Amici’s, fun was had by all! We had a raffle drawing for some great prizes and a gift exchange.

We started 2017 out with a workshop on February 17, 2017, topics and speakers included:

- Cybersecurity, Why Governments Are a High Value Target, David Mills, Carr, Riggs & Ingram LLC
- FEMA Reimbursements – Post Disaster Programs, Anne Cabrera, Tetra Tech

Our Annual Business Meeting was held on April 21, 2017 at EL Charro. Dana Blickley, Brevard County Property Appraiser, spoke about property valuations and homestead exemptions.

We scheduled our June workshop for July due to the FGFOA Conference being so late in June.

It has been a pleasure serving as President these past two years. I would like to thank Jennifer, Anne, and Kari for all their hard work, I couldn’t have done it without you. Welcome to our incoming President, Milo Zonka and President-Elect, Teri Butler. I would also like to thank Jason Loschiavo from the Central Florida Chapter for his assistance with get our new website up and running.

We continue to accept registrations and registration is open for the 2017-2018 year. If you would like to become a member, you can do so by clicking on the Space Coast Chapter on the FGFOA website or by visiting our new website www.scfgfoa.org.

Treasure Coast Chapter

Judy Browning, Chapter President

David Griffiths, EVP Client Development spoke at the April 28, 2017 meeting on FISCAL Technologies; Fraud Prevention

Greg Pagans, vice President, Multi-Bank Securities, Inc., spoke at the January 20, 2017 meeting on Investments

Susan Boyer, Executive Director, Florida Benchmarking Consortium spoke at the October 14, 2016 meeting on Performance Measures and Benchmarking

Nicole Gasparri, Organizational Program Manager, Boca Raton spoke at the July 22, 2016 meeting on Enhancing your own Performance and Power

The chapter’s average attendance is around 30 members

Volusia/Flagler Chapter***Heidi Bova, Chapter President***

The Volusia/Flagler Chapter has had a full year of interesting topics that spanned from GAB Updates, Investment topics, to Cyber Security. Attendees had the opportunity to earn a total of 13 (thirteen) Continuing Education Credits during the year.

The most recent meeting was held at the new Daytona Beach Stonewood Grill on June 9, 2017 where the new officers were sworn in and attendees earned 3 (three) hours of CPE credits.

As a reminder to all, with the close of the June 30th fiscal year, please renew your membership dues with the FGFOA and the Volusia/Flagler Chapter of the FGFOA.