SEIZE THE DAY

2019 Florida Government Finance Officers Association
Annual Conference

PROGRAM

June 8-12, 2019 | Diplomat Beach Resort | Hollywood
IMPORTANT REMINDERS

FGFOA 2019 ANNUAL CONFERENCE APP (#FGFOA2019)

The conference app is a feature to simplify and organize your conference experience. The app will have everything you need at your fingertips.

IF YOU HAVE ALREADY DOWNLOADED ATTENDIFY, SKIP TO STEP 4.

Step 1: Download the app by searching for “Attendify” in the Apple App Store or Google Play.

Step 2: Once in the app, enter your email, choose a password and click “sign up.” (You will then be sent an email to confirm your email address for your account.)

Step 3: Add your profile information and tap the check mark in the top right corner to save.

Step 4: Search “2019 FGFOA Annual Conference,” select the event and choose to join.

Don’t have an iPhone or Android? Not a problem. Access the mobile web version of the app at fgfoa.org under “Training & Education” and select “Annual Conference.”

Please note: The rating feature isn’t supported in the mobile web version. To leave feedback, you must download the app. Don’t forget to link your social media (LinkedIn, Twitter and Facebook) pages to network with fellow attendees.

If you have any questions regarding the mobile app, see a staff member at the registration desk.

SELF-SCANNING STATIONS

Self-scanning stations will be located immediately outside of each workshop. These scanners are like the scanners in grocery stores. Simply scan the barcode on your badge. Once you hear a beep and see the indicator light on the top of the scanner flash green, your name, ID number and date/time have been accepted by the scanner. There will be placards on each scanner table to indicate which class is currently being scanned.

If you have any questions, ask for one of the technology staff at the registration desk.

MEETING ROOM INTERNET CONNECTION

1. Connect to the network: FGFOA2019
2. Enter the password: dip!2019

PRESENTATIONS

The FGFOA does not print session presentation handouts. They will be posted on the conference app and on the mobile version of the app as soon as they are received from the presenters. If there is not a presentation posted for a session or speaker, then we have not received it. While we encourage speakers to send in their presentations in advance, we do not always receive them.

Once on the conference app or mobile web version, you can locate a presentation by selecting the “Schedule” and/or “Speaker” tabs, then choosing the session or speaker you would like the presentation for. If the FGFOA has received the presentation, it will be posted under the “Documents” section at the bottom of that session or speaker page.

SESSION & SPEAKER EVALUATIONS

Feedback from attendees on the quality and diversity of the FGFOA Annual Conference helps to determine future conference programs. Please remember to complete the online surveys through the conference app. The rating feature isn’t supported in the mobile web version. To leave feedback, you must do so on the app. You can choose to make your feedback anonymous by selecting “Review Anonymously.”

ELECTRONIC DEVICES

As a courtesy to our speakers and to attendees, please silence all mobile devices during the conference sessions.
**SATURDAY, JUNE 8**

7:30 a.m. - 5:00 p.m.  
Registration Desk Open  
Great Hall Registration

8:00 a.m. - 4:40 p.m.  
Leadership Pre-Conference Seminar (TB, BEH)  
Regency Ballroom 3  
(Additional and pre-registration required)

8:00 a.m. - 4:40 p.m.  
Investment Pre-Conference Seminar (TB)  
Regency Ballroom 1  
(Additional and pre-registration required)

**SUNDAY, JUNE 9**

7:30 a.m.  
Golf Tournament  
Hollywood Beach Golf Club

9:00 a.m. - 7:00 p.m.  
Registration Desk Open  
Great Hall Registration

9:00 a.m. - 10:00 a.m.  
Zumba  
307 (Third Floor - Main Tower)

10:30 a.m. - 11:00 a.m.  
Voluntary Fellowship  
215 (Second Floor - Main Tower)

11:00 a.m. - 11:45 a.m.  
First-Time Attendees’ Orientation Session  
Atlantic Ballroom 1-2

**MONDAY, JUNE 10**

7:00 a.m. - 8:00 a.m.  
Continental Breakfast  
Grand Ballroom Foyer

7:00 a.m. - 4:30 p.m.  
Registration Desk Open  
Great Hall Registration

7:15 a.m. - 7:45 a.m.  
Voluntary Fellowship  
215 (Second Floor - Main Tower)

8:00 a.m. - 9:40 a.m.  
Opening General Session (BEH)  
Grand Ballroom

9:30 a.m. - 4:00 p.m.  
Exhibit Hall Open  
Great Hall 3-6

9:40 a.m. - 10:00 a.m.  
Refreshment Break  
Great Hall 3-6

10:00 a.m. - 11:40 a.m.  
How Do You Solve the Hurricane Problem? FEMA Challenges and Issues (TB)  
Regency Ballroom 2-3

10:00 a.m. - 11:40 a.m.  
Introduction and Tools for Financial Modeling (TB)  
Atlantic Ballroom 1-2

10:00 a.m. - 11:40 a.m.  
IT, Public Records and the Sunshine Law (TB)  
Regency Ballroom 1

11:40 a.m. - 1:00 p.m.  
FGFOA 2019-2020 Standing Committee Meetings  
(NOTE: Committee members should pick up their lunch at Room 307 on the third floor of the main tower before going to their meeting rooms. All meeting rooms are also located on the third floor. Committee lunch ticket required.)

Certification Committee – 316  
Conference Host Committee – 312  
Conference Program Committee – 317  
Education & Webinar Committee – 311  
Legislative Committee – 319  
Member and Leadership Development Committee – 320  
School of Governmental Finance Committee – 314  
Technical Resources Committee – 313
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<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>11:40 a.m.</td>
<td>Lunch Available in Exhibit Hall</td>
<td>Great Hall 3-6</td>
</tr>
<tr>
<td>1:00 p.m.</td>
<td>State Compliance for Local Governments (AA)</td>
<td>Grand Ballroom</td>
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<tr>
<td>1:00 p.m.</td>
<td>Economic Update (TB)</td>
<td>Regency Ballroom 2-3</td>
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<td>Employee Engagement: Promoting Teambuilding and Good Working</td>
<td>Atlantic Ballroom 1-2</td>
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<td>Managing Banking Relationships and Analyzing Banking Fees (TB)</td>
<td>Regency Ballroom</td>
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<td>2:00 p.m.</td>
<td>Robotic Process Automation in the Government Sector (AA)</td>
<td>Grand Ballroom</td>
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<td>Long-Range Financial Plans: Preparing for the Future (TB)</td>
<td>Regency Ballroom 2-3</td>
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<td>Understanding the Fundamentals of an Investment Program (TB)</td>
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<td>Internet of Things: Becoming a Smart Municipality (TB)</td>
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<td>Refreshment Break</td>
<td>Great Hall 3-6</td>
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<td>Bond Issuance Focus: Accounting and Best Practice (AA)</td>
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<td>Avoiding Gilligan’s Island: Navigating the Economic Waters When</td>
<td>Regency Ballroom 1</td>
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<tr>
<td>4:50 p.m.</td>
<td>Investing (TB)</td>
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<tr>
<td>7:00 a.m.</td>
<td>Continental Breakfast</td>
<td>Grand Ballroom Foyer</td>
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<td>Registration Desk Open</td>
<td>Grand Registration</td>
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<td>7:15 a.m.</td>
<td>Voluntary Fellowship</td>
<td>215 (Second Floor - Main Tower)</td>
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SCHEDULE AT A GLANCE*

11:50 a.m. - 1:10 p.m.
Luncheon and Annual Business Meeting
Great Hall 4-6

2:00 p.m. - 2:50 p.m.
Popular Reporting (AA)
Grand Ballroom

2:00 p.m. - 2:50 p.m.
The Grass Is Not Always Greener: Coaching Employees (BEH)
Regency Ballroom 2-3

2:00 p.m. - 2:50 p.m.
Budget Presentation: Address Your Residents Directly (TB)
Atlantic Ballroom 1-2

2:50 p.m. - 3:10 p.m.
Refreshment Break
Grand Ballroom Foyer

3:10 p.m. - 4:50 p.m.
The Internal Audit Function (AA)
Grand Ballroom

3:10 p.m. - 4:50 p.m.
Labor Law and Workforce Changes (TB)
Regency Ballroom 2-3

3:10 p.m. - 4:50 p.m.
Special Assessments: Options and Implementation (TB)
Atlantic Ballroom 1-2

3:10 p.m. - 4:50 p.m.
Debt 102: Update on Financing Options (TB)
Regency Ballroom 1

7:00 p.m. - 10:00 p.m.
Tuesday Night Event
Gulfstream Park

9:30 p.m. - 11:30 p.m.
Hospitality Suite Open
307 (Third Floor - Main Tower)

WEDNESDAY, JUNE 12

7:00 a.m. - 8:00 a.m.
Continental Breakfast
Grand Ballroom Foyer

7:00 a.m. - 12:00 p.m.
Registration Desk Open
Grand Registration

7:15 a.m. - 7:45 a.m.
Voluntary Fellowship
215 (Second Floor - Main Tower)

8:00 a.m. - 9:40 a.m.
Lessons Learned: Control Deficiencies in Small Governments (AA)
Grand Ballroom

8:00 a.m. - 11:40 a.m.
Ethics
Atlantic Ballroom 1-2
(Additional and pre-registration required)

8:00 a.m. - 9:40 a.m.
SEC Rules and Regulations (TB)
Atlantic Ballroom 3

8:00 a.m. - 11:40 a.m.
Who, Me? Understanding Your Role as a 457 and 401a Plan Fiduciary (TB)
Atlantic Ballroom 3

10:00 a.m. - 11:40 a.m.
Paperless Office: Opportunities and Challenges (TB)
Grand Ballroom

10:00 a.m. - 11:40 a.m.
Performance Measures: From Development to Appraisal (TB)
Regency Ballroom 1

*Schedule subject to change
## SCHEDULE BY TRACK

### ACCOUNTING, AUDITING, AND FINANCIAL REPORTING

#### SUNDAY, JUNE 9

1:00 p.m. - 2:40 p.m.  
**GASB Update (AA)**  
Grand Ballroom

3:00 p.m. - 4:40 p.m.  
**GASB Hot Topics (AA)**  
Grand Ballroom

#### MONDAY, JUNE 10

1:00 p.m. - 1:50 p.m.  
**State Compliance for Local Governments (AA)**  
Grand Ballroom

2:00 p.m. - 3:15 p.m.  
**Robotic Process Automation in the Government Sector (AA)**  
Grand Ballroom

3:35 p.m. - 4:50 p.m.  
**Bond Issuance Focus: Accounting and Best Practice (AA)**  
Grand Ballroom

#### TUESDAY, JUNE 11

8:00 a.m. - 9:40 a.m.  
**Year-End Financial Reporting Considerations (AA)**  
Grand Ballroom

10:00 a.m. - 11:40 a.m.  
**Accounting and Auditing for Estimates (AA)**  
Regency Ballroom 2-3

2:00 p.m. - 2:50 p.m.  
**Popular Reporting (AA)**  
Grand Ballroom

3:10 p.m. - 4:50 p.m.  
**The Internal Audit Function (AA)**  
Grand Ballroom

### BUDGETS, ECONOMICS, AND FINANCIAL PLANNING

#### MONDAY, JUNE 10

10:00 a.m. - 11:40 a.m.  
Atlantic Ballroom 1-2

1:00 p.m. - 1:50 p.m.  
**Economic Update (TB)**  
Regency Ballroom 2-3

2:00 p.m. - 3:15 p.m.  
**Long-Range Financial Plans: Preparing for the Future (TB)**  
Regency Ballroom 2-3

#### TUESDAY, JUNE 11

10:00 a.m. - 11:40 a.m.  
**Outsourcing Services: Things to Consider (TB)**  
Regency Ballroom 1

2:00 p.m. - 2:50 p.m.  
**Budget Presentations: Address Your Residents Directly (TB)**  
Atlantic Ballroom 1-2

3:10 p.m. - 4:50 p.m.  
**Special Assessments: Options and Implementation (TB)**  
Atlantic Ballroom 1-2

### WEDNESDAY, JUNE 12

8:00 a.m. - 9:40 a.m.  
**The Cost of Government Services (TB)**  
Regency Ballroom 1

10:00 a.m. - 11:40 a.m.  
**Performance Measures: From Development to Appraisal (TB)**  
Regency Ballroom 1

### POLICY, LEADERSHIP, STRATEGIC PLANNING, AND PERSONNEL

#### SUNDAY, JUNE 9

1:00 p.m. - 2:40 p.m.  
**Focus on Privacy: HIPAA and FIPA Update (TB)**  
Atlantic Ballroom 1-2

3:00 p.m. - 4:40 p.m.  
**Secrets to Writing Bid Specs and Reviewing Procurement Bids (TB)**  
Atlantic Ballroom 1-2

#### MONDAY, JUNE 10

10:00 a.m. - 11:40 a.m.  
**How Do You Solve the Hurricane Problem? FEMA Challenges and Issues (TB)**  
Regency Ballroom 2-3

1:00 p.m. - 1:50 p.m.  
**Employee Engagement: Promoting Teambuilding and Good Working Relationships (BEH)**  
Atlantic Ballroom 1-2

3:35 p.m. - 4:50 p.m.  
**Strategic Planning for Your Capital Improvement Plans (TB)**  
Regency Ballroom 2-3
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<tr>
<td>8:00 a.m. - 9:40 a.m.</td>
<td>We Are All Great Accountants, But Are We Great Communicators? (TB)</td>
<td>Regency Ballroom 2-3</td>
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<td>Legislative Update (TB)</td>
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<td>The Grass Is Not Always Greener: Coaching Employees (BEH)</td>
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### BANKING, INVESTMENT, RISK, TREASURY MANAGEMENT, AND DEBT MANAGEMENT

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<td>Avoiding Gilligan's Island: Navigating the Economic Waters When Investing (TB)</td>
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<td>8:00 a.m. - 9:40 a.m.</td>
<td>Bonds, Financing and Investment Policies: The Good, the Bad and the Ugly (TB)</td>
<td>Regency Ballroom 1</td>
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<td>2:00 p.m. - 2:50 p.m.</td>
<td>Debt 101: Best Practices in Debt Management (TB)</td>
<td>Regency Ballroom 1</td>
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<td>3:10 p.m. - 4:50 p.m.</td>
<td>Debt 102: Update on Financing Options (TB)</td>
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## WEDNESDAY, JUNE 12

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<td>SEC Rules and Regulations (TB)</td>
<td>Atlantic Ballroom 3</td>
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<td>Who, Me? Understanding Your Role as a 457 and 401a Plan Fiduciary (TB)</td>
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### TECHNOLOGY

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<td>Blockchain and Cryptocurrency (TB)</td>
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<td>Paperless Office: Opportunities and Challenges (TB)</td>
<td>Grand Ballroom</td>
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</table>
Kent Olson, CGFO  
FGFOA President  
Deputy Treasurer/Clerk  
City of Tallahassee

Ken Burke, CPA  
FGFOA President-Elect  
Clerk of the Circuit Court & Comptroller  
Pinellas County

Jamie Roberson, CGFO  
FGFOA Secretary/Treasurer  
Finance Director  
City of Apopka

Alton L. “Rip” Colvin Jr., CPA, CGFO, CPM  
Executive Director  
Justice Administrative Commission

Frank L. DiPaolo, CPA, CGMA  
Finance Director  
City of Lighthouse Point

Nicole Gasparri, CGFO  
Organizational Program Manager  
City of Boca Raton

Mike Gomez, CPA  
Audit Manager  
Florida Auditor General

Jonathan C. McKinney, CGFO  
Finance Director  
City of New Smyrna Beach

Shannon Ramsey-Chessman, CPA, CGFO  
Chief Operating Officer  
Palm Beach County Clerk & Comptroller

William Spinelli, CPA  
Controller  
City of Orlando

Kelly Rae Strickland, CPA, CGFO  
Director of Financial Administration  
City of Sarasota

Paul Shamoun  
Executive Director of the FGFOA
CONFERENCE PROGRAM COMMITTEE

Chair: Bryan Cahen, City of Weston

Committee Members:
Moises Ariza, Marcum LLP
Michelle Blackstock, Crowe Horwath LLP
Lyn Boswell, City of Temple Terrace
Jan Brewer, Manatee County
Rob Broline, Carr, Riggs & Ingram LLC
Zach Chalifour, James Moore & Co.
Yvonne Clayborne, Carr, Riggs & Ingram LLC
P. Ross Clotherman, Rehmann
Greg Cowan, Justice Administrative Commission
Kimberly Ferrell, City of North Port
Mara Frederiksen, City of Boynton Beach
Brett Friedman, RSM US LLP
Nicole Jovanovski, Sarasota County Clerk & Comptroller
Jeffrey Larson, Larson Consulting Services, LLC
Susan Nabors, City of North Lauderdale
Jacob Peacock, AndCo Consulting
Michael Quesada, Keefe McCullough
Tanya Quickel, Village of Wellington
Francine Ramaglia, Palm Beach County
Rebecca Reynolds-Russell, JP Morgan Chase
Alan Ricafort, MSL CPAs & Advisors
James Rizzo, Gabriel, Roeder, Smith & Company
Jamie Roberson, City of Apopka
Rebecca Roberts, City of Ocoee
Jonathan Rushnak, Hillsborough County
Daniela Russell, Seacoast Utility Authority
Ken Sinclair, Broward County
Rebecca Tew, Town of Gulf Stream
Matthew Wade, Florida Local Government Investment Trust
Brent Wertz, Water Walker Investments
Cassandra Williams, Pinellas County Clerk of the Circuit Court

Board Liaison: Alton L. “Rip” Colvin Jr., Justice Administrative Commission

CONFERENCE HOST COMMITTEE

Chair: Laura Aker-Reece, City of Fort Lauderdale

Committee Members:
Emily Alves, SWA of PBC
Sheliza Bhola, City of Holly Hill
Judy Browning, City of Stuart
Kathleen Campbell, Children’s Services Council of Broward
Marcia Carty, Broward County
Kadem Chevere, City of Boca Raton
Donna Cousins, City of Miramar
Christine Davis, City of Orange City
Adrienne Dwyer, City of Fort Lauderdale
Kathryn Eno, Purvis, Gray & Company, LLP
Ian Evans-Smith, City of Miramar
Melba Gray, City of Jacksonville
Jeanette Haynes, City of West Palm Beach
Shandra Jenkins, Escambia County
Dianne Klaiss, Frasca & Assoc.
Robyn Lawrence, Palm Beach County
Fiona Morrell, City of Miramar
Jacob Peacock, AndCo Consulting
Rebecca Reynolds-Russell, JP Morgan Chase
Rebecca Roberts, City of Ocoee
Georgina Rodriguez, City of Pembroke Park
Jonathan Rushnak, Hillsborough County
Janice Scott, Duval County Public School Board
Scott Simpson, MPA
Gitaanjali Sookdeo, City of Orlando
William Underwood, III
Holly Vath, City of Stuart
Natalee Wallace, RSM US LLP
Katherine Woodruff, Sarasota County Clerk of the Circuit Court & Comptroller

Board Liaison: Nicole Gasparri, City of Boca Raton
The 2019 Host Committee has planned several networking opportunities during the conference that will make your stay at the Diplomat Beach Resort a memorable experience for you and your guests. To help you plan your activities for after conference hours, here is an overview of the events organized by the Host Committee.

**EXHIBIT HALL**
Great Hall 3-6

- **Sunday, June 9**
  - 11:00 a.m. - 4:30 p.m.
  - 5:30 p.m. - 7:00 p.m.

- **Monday, June 10**
  - 9:30 a.m. - 4:00 p.m.

Be sure to visit the exhibit hall and meet with the companies that help make this conference possible. Refreshment breaks, Sunday's Association Night reception and Monday's lunch will be held in the exhibit hall. Remember to drop off your business card with each exhibitor to be eligible for **prize drawings from each booth**. Drawings will be held Monday by noon, and all winners’ names will be posted on a message screen outside the hall.

**HOSPITALITY SUITE**
307 (Third Floor - Main Tower)

- **Sunday, June 9**
  - 8:30 p.m. - 11:30 p.m.

- **Monday, June 10**
  - 8:30 p.m. - 11:30 p.m.

- **Tuesday, June 11**
  - 9:30 p.m. - 11:30 p.m.

After a long day, join us in the hospitality suite to relax and network with friends, vendors and colleagues while enjoying refreshments. There will be plenty of activities going on, so be sure to check us out! There may even be some unplanned entertainment.

**GOLF TOURNAMENT**
Hollywood Beach Golf Club
*(Additional and pre-registration required)*

- **Sunday, June 9**
  - 7:30 a.m. - 12:00 p.m.

Why not mix a little fun along with your education in Hollywood? Join your fellow FGFOA members in a friendly scramble golf tournament on Sunday morning before the conference. Plans have been made for a wonderful event full of contests and prizes at the Hollywood Beach Golf Club, located just a few miles away from the Diplomat Beach Resort.

**ZUMBA CLASS**
307 (Third Floor - Main Tower)

- **Sunday, June 9**
  - 9:00 a.m. - 10:00 a.m.

Fitnes enthusiasts, please join us for a fun and energetic Zumba class. The class will be led by our own Nicole Gasparri. She is sure to get your heart beat up and ready for the day.

**ASSOCIATION NIGHT RECEPTION**
Great Hall 3-6

- **Sunday, June 9**
  - 5:30 p.m. - 7:00 p.m.

Held in the Exhibit Hall, attendees will have the opportunity to mingle with exhibitors, friends and colleagues and learn about innovative financial advances. Participate in the **exhibit hall bingo game** for the chance to win a prize at the end of the evening!

One ticket to this event is included in your registration fee. You can purchase extra tickets for guests before or during the conference at the registration desk.

**Association Night is open to registered adults only - no children, please.**
EMERGING LEADERS NETWORK EVENT
307 (Third Floor - Main Tower)

Monday, June 10 5:00 p.m. - 6:15 p.m.

This event is for members who are early- to mid-career finance professionals and who want to continue to grow and become more involved in FGFOA. Emerging leaders will have the opportunity to learn from veteran members and network with colleagues. Plan to make new friends, reconnect with old friends and establish lifelong connections.

TUESDAY NIGHT EVENT
Gulfstream Park

Tuesday, June 11 7:00 p.m. - 10:00 p.m.

Come ready to party at Gulfstream Park. The event will include dinner and dancing to live music by the Shane Duncan Band. You’ll also have time on your own to explore all of the additional entertainment and shopping options on-site.

One ticket to this event is included in your registration fee. Additional tickets are available for purchase at the FGFOA Registration Desk until 4:30 p.m. the day of the event.

Transportation Instructions
Buses will load at the convention center entrance beginning at 6:15 p.m. Continuous return trips will be available beginning at 8:00 p.m., with the last bus leaving Gulfstream Park at 10:30 p.m.

Note: You must wear your name badge to this event and bring your entry ticket. The ticket will be collected at the entrance to the Ten Palms Room at the park.
**SESSION SCHEDULE**

**SATURDAY - JUNE 8**

7:30 a.m. - 5:00 p.m.
Registration Desk Open
Great Hall Registration

8:00 a.m. - 4:40 p.m.
Pre-Conference Seminars
(Additional and pre-registration required)

**LEADERSHIP**

Regency Ballroom 3
CPE: 6 Hours (TB) and 2 Hours (BEH)

*Moderators: Ken Burke, CPA, Clerk of the Circuit Court & Comptroller, Pinellas County; and Jonathan C. McKinney, CGFO, Finance Director, City of New Smyrna Beach*

8:00 a.m. - 9:40 a.m.
**Everything Florida: Where We’ve Been and Where We’re Going**
Understand what Fortune 500 companies, significant businesses and high-profile individuals in Florida are seeing now. This session will include information on resolving business and governmental disputes, and advising CEOs and C-suite executives on business, law and government from a national, state and local perspective.

*Speaker: George LeMieux, Chairman of the Board, Gunster Law Firm*

10:00 a.m. - 11:40 a.m.
**Financial Strategies for Sustainable Parks**
We have entered a new era of parks and recreation financial planning and management. Local governments are challenged to provide an increasingly diverse breadth of parks, recreation and social services, while competing for limited available funding. This era provides an opportunity for local governments to develop new and creative financial strategies for providing high-quality services to their residents. This session will describe financial trends in parks and recreation services, including understanding cost savings, partnerships, increasing revenues, contracting for services and, ultimately, the economic impact of parks.

*Speaker: Joseph Webb, RLA, Director of Park Planning, AECOM*

1:00 p.m. - 2:40 p.m.
**The City of West Palm Beach: Leveraging Performance Management Software for Increased Transparency and Better Strategy Execution**
By having the right data and the right people in the room at the same time, the City of West Palm Beach is truly executing its strategy, with the city manager and mayor saying that these are the most valuable meetings they participate in all month. Recently, the city has invested its resources in a community dashboard, which will act as a public-facing website designed for the city to provide more robust information, insights and analysis to citizens. This is in line with the city’s commitment to increasing transparency and accountability, as well as improving customer service, and will serve as a snapshot to the public of how their city government is working and where their resources are being allocated.

*Speakers: Laura Chandler, Director, ClearPoint Strategy; and Mark Parks, Chief Financial Officer, City of West Palm Beach*

3:00 p.m. - 4:40 p.m.
**The 21st Century Leader**
What do leaders really need to do? What do people most admire and expect from their leaders? Are leaders born or made? Can leadership be made? What does the research reveal? This session is designed to raise awareness and motivate participants to become great leaders. It will provide new insights on what makes leaders extraordinary and help develop a clear understanding of the leadership competencies and profiles.

8:00 a.m. - 4:40 p.m.
**INVESTMENT**
Regency Ballroom 1
*CPE: 8 Hours (TB)*
**Moderator:** Jamie Roberson, CGFO, Finance Director, City of Apopka

8:00 a.m. - 9:40 a.m.
**U.S./Global Economics Overview**
With the economy back to full strength, concerns about a decade of slow growth have given way to worries about overheating and the potential for a new recession. This session will discuss the economic prospects for the next several years and the implications for the U.S and global economies.

*Speaker:* Dudley Carter, CPA, Economist, Vining Sparks

10:00 a.m. - 11:40 a.m.
**Florida Economic Update**
How is the Florida economy performing, both statewide and in your region? This session will review some of the major factors influencing our state.

*Speaker:* Scott Brown, Ph.D., Chief Economist, Raymond James

1:00 p.m. - 2:40 p.m.
**Approach to Investments: Small/Mid/Large**
Is your portfolio ready for the next turn in the market cycle? The investment environment has gone through several major changes over the past few years and is poised for another big shift. A panel of government investment officers will discuss different approaches to managing investment programs of all sizes through these changes. The panel will review several facets impacting their investment activity, including managing investment liquidity, evaluating investment strategies, selecting investment instruments and measuring and reporting results.

*Speakers:* Fay Henry, City Treasurer, City of Port St. Lucie; Monti Larsen, CPA, Chief Operating Officer, Children’s Services Council of Broward; Richard Pengelly, CFA, CTP, Director, PFM Asset Management, LLC; and Mark Peterson, Accounting Supervisor, Brevard County

3:00 p.m. - 4:40 p.m.
**Interactive Portfolio Management**
Come hear an update on portfolio management from a total return perspective. This session will include a small group active portfolio management exercise.

*Speakers:* Brian Hextell, Senior Vice President, Institutional Portfolio Management, PMA Financial Network; and Rene O’Day, Senior Vice President, Sales & Relationship Management, PMA Financial Network

7:30 a.m.
**Golf Tournament**
Hollywood Beach Golf Club

9:00 a.m. - 10:00 a.m.
**Zumba**
307 (Third Floor - Main Tower)

9:00 a.m. - 7:00 p.m.
**Registration Desk Open**
Great Hall Registration

10:30 a.m. - 11:00 a.m.
**Voluntary Fellowship**
215 (Second Floor - Main Tower)

11:00 a.m. - 4:30 p.m.
**Exhibit Hall Open**
Great Hall 3-6

11:00 a.m. - 11:45 a.m.
**First-Time Attendees’ Orientation Session**
Atlantic Ballroom 1-2

11:00 a.m. - 4:30 p.m.
**Exhibit Hall Open**
Great Hall 3-6

1:00 p.m. - 2:40 p.m.
**GASB Update**
Grand Ballroom
*CPE: 2 Hours (AA)*
This session will include a general update on future pronouncements and proposals affecting state and local government.
SUNDAY - JUNE 9

Focus on Privacy: HIPAA and FIPA Update
Atlantic Ballroom 1-2
CPE: 2 Hours (TB)
HIPAA is a powerful litigation weapon, if violated. FIPA and other Florida privacy laws can also be potent litigation weapons. Learn the latest information to improve your policies and procedures dealing with HIPAA, FIPA and other Florida privacy laws.

Speaker: Kevin Smith, IT Director, Gehring Group
Moderator: Marcia Carty, CPA, Accounting Supervisor, Broward County

2:40 p.m. - 3:00 p.m.
Refreshment Break
Great Hall 3-6

3:00 p.m. - 4:40 p.m.
GASB Hot Topics
Grand Ballroom
CPE: 2 Hours (AA)
In its ongoing efforts to increase the informative value of governmental financial statements and better meet the needs of financial statement users, the Governmental Accounting Standards Board (GASB) undertakes projects to improve existing financial reporting standards and establish new, impactful standards. This session will update conference participants on the projects on the GASB’s current technical agenda.

Speaker: Brian W. Caputo, Ph.D., CPA, Vice President, Administrative Affairs & Treasurer, College of DuPage
Moderator: Kent Olson, CGFO, Deputy Treasurer/Clerk, City of Tallahassee

SUNDAY - JUNE 9 CONTINUED

Secrets to Writing Bid Specs and Reviewing Procurement Bids
Atlantic Ballroom 1-2
CPE: 2 Hours (TB)
Learn how to overcome the stress of writing bid specs so you don’t get stuck in the process while searching for the best services, products and equipment. Make sure you have the terms, conditions and specifications you need so that you don’t become trapped.

Speaker: Clifford McCue, Ph.D., Professor, School of Public Administration, Florida Atlantic University
Moderator: Jonathan C. McKinney, CGFO, Finance Director, City of New Smyrna Beach

5:30 p.m. - 7:00 p.m.
Association Night Reception
Great Hall 3-6

8:30 p.m. - 11:30 p.m.
Hospitality Suite Open
307 (Third Floor - Main Tower)

MONDAY - JUNE 10

7:00 a.m. - 8:00 a.m.
Continental Breakfast
Grand Ballroom Foyer

7:00 a.m. - 4:30 p.m.
Registration Desk Open
Great Hall Registration

7:15 a.m. - 7:45 a.m.
Voluntary Fellowship
215 (Second Floor - Main Tower)

8:00 a.m. - 9:40 a.m.
Opening General Session
Grand Ballroom

Color Guard: City of Hollywood Fire Department
Color Guard

Pledge of Allegiance
National Anthem: Francine Recchi

Invocation: Monsignor Jean Pierre, St. Maurice at Resurrection Catholic Church

Welcome Address: Josh Levy, Mayor, City of Hollywood

Remarks from the GFOA: Terry Stone, President-Elect, Government Finance Officers Association and Assistant Superintendent for Business and Operations, Hanover County Public Schools, Virginia

Keynote Presentation
7 Keys of Personal and Professional Success
CPE: 1 Hour (BEH)

American entrepreneur, author and motivational speaker Jim Rohn once said, “All good men and women must take responsibility to create legacies that will take the next generation to a level we could only imagine.” When a person realizes that they are here for a purpose, life takes on a whole new meaning. We find ourselves having dreams and visions that wake us up early in the morning and keep us up late at night. It is for those reasons that you are here, to manifest greatness in this lifetime and for the next generations to come. Donovin Darius methodically shares his 7 key ingredients that are essential when desiring to achieve greatness, make an impact and leave a legacy.

9:30 a.m. - 4:00 p.m.
Exhibit Hall Open
Great Hall 3-6

9:40 a.m. - 10:00 a.m.
Refreshment Break
Great Hall 3-6

10:00 a.m. - 11:40 a.m.
GASB 87: Deep Dive
Grand Ballroom
CPE: 2 Hours (AA)

In June 2017, the Governmental Accounting Standards Board approved its Statement 87, Leases. The standard is effective for reporting periods beginning after December 15, 2019. This session will cover the major accounting and financial reporting issues associated with implementing Statement 87. The standard will increase the usefulness of governments’ financial statements by requiring the reporting of certain lease liabilities that are not currently reported. It will enhance the comparability of financial statements among governments by requiring lessees and lessors to report leases under a single model. This session will also review practice matters that are likely to be addressed in GASB’s soon-to-be-released implementation guide for Statement 87.

Speaker: Brian W. Caputo, Ph.D., CPA, Vice President, Administrative Affairs & Treasurer, College of DuPage
Moderator: Shannon Ramsey-Chessman, CPA, CGFO, Chief Operating Officer, Palm Beach County Clerk & Comptroller

How Do You Solve the Hurricane Problem? FEMA Challenges and Issues
Regency Ballroom 2-3
CPE: 2 Hours (TB)

Learn how to build your culture of preparedness by having pre-positioned contracts with enforcement mechanisms. This session will also cover “rainy day” or disaster relief funds and federal procurement standards.

Speaker: Steve Hynes, Emergency Management Director, City of Delray Beach
Moderator: Jonathan C. McKinney, CGFO, Finance Director, City of New Smyrna Beach

Introduction and Tools for Financial Modeling
Atlantic Ballroom 1-2
CPE: 2 Hours (TB)

Explore the technologies, applications and practices for the collection, integration, analysis and presentation of data through the use of business intelligence. Learn how to use dashboards to support financial reporting and provide interactive analysis of day-to-day operations and trends.
SESSION SCHEDULE

MONDAY - JUNE 10 CONTINUED

Speaker: Olga Rabel, CGFO, Assistant County Budget Officer, Sumter County
Moderator: Jonathan Rushnak, Fiscal Analyst, Hillsborough County

IT, Public Records and the Sunshine Law
Regency Ballroom 1
CPE: 2 Hours (TB)
Florida has the broadest open government laws in the nation. This session will provide an overview of Florida’s public records and open meetings laws, highlighting unique issues of the digital age.

Speaker: Nikki Day, Attorney, Bryant Miller Olive
Moderator: Alton L. “Rip” Colvin Jr., CPA, CGFO, CPM, Executive Director, Justice Administrative Commission

11:40 a.m. - 1:00 p.m.
FGFOA 2019-2020 Standing Committee Meetings
(NOTE: Committee members should pick up their lunch at Room 307 on the third floor of the main tower before going to their meeting rooms. All meeting rooms are also located on the third floor. Committee lunch ticket required.)

Certification Committee – 316
Conference Host Committee – 312
Conference Program Committee – 317
Education & Webinar Committee – 311
Legislative Committee – 319
Member and Leadership Development Committee – 320
School of Governmental Finance Committee – 314
Technical Resources Committee – 313

11:40 a.m. - 1:00 p.m.
Lunch Available in Exhibit Hall
Great Hall 3-6

1:00 p.m. - 1:50 p.m.

State Compliance for Local Governments
Grand Ballroom
CPE: 1 Hour (AA)
All counties, municipalities and special districts are required to complete various annual reporting requirements to be in compliance with Florida statutes. This session will provide details on those reporting requirements.

Speaker: Alton L. “Rip” Colvin Jr., CPA, CGFO, CPM, Executive Director, Justice Administrative Commission
Moderator: Mike Gomez, CPA, Audit Manager, Office of the Florida Auditor General

Economic Update
Regency Ballroom 2-3
CPE: 1 Hour (TB)
Economic conditions affect budgeting and financial planning functions in all governmental entities. This session will discuss the current state of the economy and provide national, state and regional trends.

Speaker: David Jang, CTP, Partner, Client Advisory Services, Water Walker Investments
Moderator: William Spinelli, CPA, Controller, City of Orlando

Employee Engagement: Promoting Teambuilding and Good Working Relationships
Atlantic Ballroom 1-2
CPE: 1 Hour (TB)
Learn how to encourage staff to be proactive, take pride in their work and promote teambuilding and good working relationships within and outside the department.

Speaker: Dale Pazdra, Director of Human Resources, City of Coral Springs
Moderator: Nicole Gasparri, CGFO, Organizational Program Manager, City of Boca Raton

Managing Banking Relationships and Analyzing Bank Fees
Regency Ballroom 1
CPE: 1 Hour (TB)
Have you received your banking services fee statement and struggled to interpret and analyze it? Governments procuring banking services struggle to understand the variations between bank service fees. This session will review services within product groups to identify best practices and options for electronic adoption and help you to gain a level of transparency in banking service fees.
Speakers: Brittany Hinsberg, Financial Analyst, Sarasota County Clerk & Comptroller’s Office; and Eileen Roberts, Executive Director, JPMorgan Chase & Co. 
Moderator: Nicole Jovanovski, CPA, Director of Finance, Sarasota County Clerk & Comptroller

2:00 p.m. - 3:15 p.m.

Robotic Process Automation in the Government Sector
Grand Ballroom
CPE: 1.5 Hours (AA)
Over the past several years, we have witnessed a rapid adoption of automation technologies within the commercial sector. Given the never-ending pressure to increase constituent services in the face of flat or declining operating budgets, automation technology represents a unique opportunity to streamline selected governmental processes. This session will provide an educational primer on robotic process automation technologies, including implementation methods and specific-use cases applicable to state and local government.

Speakers: Moises D. Ariza, CPA, CGMA, Senior Manager, Marcum LLP; and Rob Drover, Principal, Marcum LLP
Moderator: Linda Benoit, Division Manager, Fiscal & Accounting Services, Enterprise Solutions & Quality Assurance

Long-Range Financial Plans: Preparing for the Future
Regency Ballroom 2-3
CPE: 1.5 Hours (TB)
This session will discuss how to prepare and arrange long-range financial plans and budgets.

Speaker: Diane Reichard, CPA, CGMA, CGFO, CPFO, Chief Financial Officer, City of Plant City
Moderator: Bryan Cahen, Director of Budget, City of Weston

Understanding the Fundamentals of an Investment Program
Atlantic Ballroom 1-2
CPE: 1.5 Hours (TB)
If you’re beginning a role as an investment officer, how do you get started? This panel will provide an overview of the Florida statutes, investment best practices and some practical investment approaches. Discussion will include the process of retaining some key professionals who can be of assistance to you, including a trustee bank, custodian or safekeeping bank, an investment advisor and outside counsel.

Speakers: Scott McIntyre, CFA, Senior Portfolio Manager & Managing Director, FirstSouthwest Asset Management; and Darrel Thomas, CPFIM, Assistant City Manager/CFO, City of Weston
Moderator: Jonathan C. McKinney, CGFO, Finance Director, New Smyrna Beach

Internet of Things: Becoming a Smart Municipality
Regency Ballroom 1
CPE: 1.5 Hours (TB)
The internet of things can help municipalities to improve infrastructure, public utilities, services and more. However, many challenges remain and implementing smart technology must be done in a planned and highly secure manner.

Speaker: Michal Gurgacz, CISA, IT Risk Assurance Manager, MSL CPAs & Advisors
Moderator: Daniela Russell, Finance Director, Seacoast Utility Authority

3:15 p.m. - 3:35 p.m.
Refreshment Break
Great Hall 3-6

3:35 p.m. - 4:50 p.m.
Bond Issuance Focus: Accounting and Best Practice
Grand Ballroom
CPE: 1.5 Hours (AA)
This session will discuss what best practices an issuer can implement with respect to current and future bond issues, as well as touch on the accounting and auditing associated with bond issuances.

Speakers: Lori Smith-Lalla, Attorney, Weiss Serota Helfman Cole & Bierman; and Todd A. Webster, CPA, Partner, KPMG LLP
Moderator: Kelly Rae Strickland, CPA, CGFO, Director of Financial Administration, City of Sarasota
Strategic Planning for Your Capital Improvement Plans
Regency Ballroom 2-3
CPE: 1.5 Hours (TB)
What is the role of leadership in strategic implementation or project planning? This session will answer those questions as they relate to capital improvement planning.

Speaker: Frank L. DiPaolo, CPA, CGMA, Finance Director, City of Lighthouse Point
Moderator: Mary Lou Pickles, CGFO, CMA, Director, Office of Financial Services, St. Johns River Water Management District

Blockchain and Cryptocurrency
Atlantic Ballroom 1-2
CPE: 1.5 Hours (TB)
The session will provide an explanation of cryptocurrency and Blockchain concepts and technologies. Expectations, solutions and implementation issues will be presented and discussed. Attendees will gain insight between the hype or reality of these technologies, as well as gain a better understanding of the current state and future possibilities of cryptocurrency and Blockchain.

Speaker: Santosh Pradhan, CEO, SANROSE Information Services, Inc.
Moderator: Ken Burke, CPA, Clerk of the Circuit Court & Comptroller, Pinellas County

Avoiding Gilligan’s Island: Navigating the Economic Waters When Investing
Regency Ballroom 1
CPE: 1.5 Hours (TB)
This session will cover the many different challenges a local government official faces when making investment decisions while surrounded by many economic influences, including the effect of tariffs, stock market volatility and political pressures.

Speakers: Mark DeBoard, CGFO, Director of Finance, Altamonte Springs; and Christopher J. Greco, Partner, Institutional Marketing & Client Service, Sawgrass Asset Management
Moderator: Linda Logan-Short, CGFO, CPM, Interim Assistant City Manager/CFO, City of Fort Lauderdale

Year-End Financial Reporting Considerations
Grand Ballroom
CPE: 2 Hours (AA)
As governments are operating in increasingly complex environments, financial statement users are requesting financial reports that are more user friendly. This session will discuss leading practices in preparing year-end financial statements and observations of common reporting mistakes.

Speaker: Christopher Kessler, CPA, Principal, State & Local Government, CliftonLarsonAllen LLP
Moderator: Linda Benoit, Division Manager, Fiscal & Accounting Services, Enterprise Solutions & Quality Assurance

We Are All Great Accountants, But Are We Great Communicators?
Regency Ballroom 2-3
CPE: 2 Hours (TB)
Learn how to be a better business writer and the ins and outs of developing professional relationships. This
session will help you understand what the media needs and how to meet those needs ... And what not to do.

Speaker: Lisa De La Rionda, Director of Public Affairs, Palm Beach County
Moderator: Linda S. Howard, CPA, CTP, Chief Financial Officer, Florida Municipal Power Agency

Tools for Dashboard Design and Development
Atlantic Ballroom 1-2
CPE: 2 Hours (TB)
The City of Weston has developed several executive dashboards using Microsoft’s PowerBI. The dashboard reports are accessible over the internet and via mobile apps, providing near real-time analytics on various financial and operational systems. These dashboards provide city employees with the tools needed to make better decisions.

Speakers: Jamie Black, President, fhblackinc.com; and Ryan M. Fernandes, Director of Technology Services, City of Weston
Moderator: Ken Burke, CPA, Clerk of the Circuit Court & Comptroller, Pinellas County

Bonds, Financing and Investment Policies: The Good, the Bad and the Ugly
Regency Ballroom 1
CPE: 2 Hours (TB)
This session will focus on the key components of good debt management, fund balance and investment policies and answer questions such as: where do you start and how can existing ones be best updated so that they are useful and relevant to your local government? The panel to also discuss ways to examine cash flow and liquidity policy measurement purposes.

Speakers: Lourdes R. Abadin, Managing Director, Estrada-Hinojosa; Ismael Diaz, Chief Financial Officer, Town of Miami Lakes; Steven W. Eaddy, Senior Vice President, Estrada-Hinojosa; and Cristina Zeinali, Vice President, Estrada-Hinojosa
Moderator: Louis Boglioli, Director of Financial Services, City of Stuart

9:40 a.m. - 10:00 a.m.
Refreshment Break
Grand Ballroom Foyer

10:00 a.m. - 11:40 a.m.
Legislative Update
Grand Ballroom
CPE: 2 Hours (TB)
This session will review the 2019 legislative session, review the bills that passed and failed, and discuss their implications for local governments.

Speakers: Jason Harrell, Director, Legislative & Public Affairs, Florida Court Clerks & Comptrollers; Amber Hughes, Senior Legislative Advocate, Florida League of Cities; and Laura Youmans, Legislative Counsel, Florida Association of Counties
Moderator: Susan Nabors, CPA, CGFO, Director of Finance, City of North Lauderdale

Accounting and Auditing for Estimates
Regency Ballroom 2-3
CPE: 2 Hours (TB)
This session will discuss some key factors to be considered when accounting for estimates. It will go into detail on some of the estimates that are most commonly found in, and most impactful to, governments. The session will also provide an auditor’s perspective by explaining the audit requirements surrounding accounting estimates and discussing examples of the type of evidence an auditor would typically look for to support an estimate.

Speakers: Robert Lemmon, Audit Partner, Carr Riggs Ingram, LLC; and April Shuping, CPA, CGFO, Partner, Carr Riggs Ingram, LLC
Moderator: Jamie Roberson, CGFO, Finance Director, City of Apopka

How Artificial Intelligence Is Changing Accounting and Finance
Atlantic Ballroom 1-2
CPE: 2 Hours (AA)
The terms “artificial intelligence” and “machine learning” are becoming more and more commonplace in the conversations and communications of everyday business,
both within and outside of the public sector. The question is, does your organization understand what this really means and what the potential benefits are?

**Speakers:** Justin Bass, Chief Data Science Officer, Crowe LLP; and Matthew Geerdes, CPA, Senior Manager, Crowe LLP
**Moderator:** Shannon Ramsey-Chessman, CPA, CGFO, Chief Operating Officer, Palm Beach County Clerk & Comptroller

### Outsourcing Services: Things to Consider

Regency Ballroom 1  
**CPE:** 2 Hours (TB)  
This session will consider all of the pros and cons of outsourcing services. Hear from the city manager of a contract city and a service provider providing consulting services to the city.

**Speakers:** Dennis Giordano, Partner, Calvin Giordano and Associates; and John Flint, City Manager, City of Weston  
**Moderator:** Bryan E. Cahen, Director of Budget, City of Weston

11:50 a.m. - 1:10 p.m.  
**Luncheon and Annual Business Meeting**  
Great Hall 4-6

2:00 p.m. - 2:50 p.m.

### Popular Reporting

Grand Ballroom  
**CPE:** 1 Hour (AA)  
The Popular Annual Financial Report (PAFR), written for the non-financially inclined reader, contains valuable and summarized information for all who are interested. By making the financial report easier to understand and user friendly, the PAFR is another example of an entity’s commitment to improving communications with citizens and increasing public confidence in the governing body.

**Speaker:** Alfredo Riverol, CPA, CRFAC, CGFM, CGMA, Chief Financial Officer, City of South Miami  
**Moderator:** Linda Benoit, Division Manager, Fiscal & Accounting Services, Enterprise Solutions & Quality Assurance

### The Grass Is Not Always Greener: Coaching Employees

Regency Ballroom 2-3  
**CPE:** 1 Hour (TB)
This session will help you learn how to coach your employees while looking at a long-range plan, incorporating mentoring and coaching.

**Speaker:** Loren E. Slaydon, SPHR, SHRM-SCP, Director, Human Resources Department, City of Lake Worth  
**Moderator:** Lorrie A. Simmons, MSA, CGFO, Manager, Accounting & Payroll Systems, City of Sarasota

### Budget Presentations: Addressing Your Residents Directly

Atlantic Ballroom 1-2  
**CPE:** 1 Hour (TB)  
Budgets contain a lot of valuable information for the public. Budget officers must use innovative methods to communicate this information with residents. This session will discuss ways to amp up online and in-person alternatives to invite more participation and communication with residents on the budget.

**Speaker:** Christine Wadleigh, Budget & Reporting Director, Village of Wellington  
**Moderator:** Katie Roundtree, CPA, CGFO, Finance Director, Northern Palm Beach County Improvement District

### Debt 101: Best Practices in Debt Management

Regency Ballroom 1  
**CPE:** 1 Hour (TB)  
This session will cover best practices in debt management, the key team players you need to engage and their roles.

**Speakers:** Jennifer M. LaRocco, Shareholder, Public Finance Group, GrayRobinson, P.A.; Natalie Sidor, Managing Director, Public Resources Advisory Group; and Julie Wisdom, Debt & Financial Analysis Manager,
Enterprise Solutions & Quality Assurance
*Moderator: Kelly Rae Strickland*, CPA, CGFO, Director of Financial Administration, City of Sarasota

2:50 p.m. - 3:10 p.m.  
**Refreshment Break**  
Grand Ballroom Foyer

3:10 p.m. - 4:50 p.m.  
**The Internal Audit Function**  
Grand Ballroom  
*CPE: 1.5 Hours (AA)*  
This session will include a review of hot topics and risks for Florida’s public sector. It will also cover the critical information that management and internal audit should know.

*Speaker: Laura Manlove*, Manager, RSM  
*Moderator: Jeffrey R. Smith*, CPA, CGFO, CGMA, Clerk of Circuit Court & Comptroller, Indian River County

**Labor Law and Workforce Changes**  
Regency Ballroom 2-3  
*CPE: 1.5 Hours (TB)*  
This session will discuss ways to handle medical marijuana in your organization’s drug-free workplace. It will also focus on using emotional intelligence for better work teams.

*Speaker: Lara Donlon*, SPHR, SHRM-SCP, Shareholder, Torcivia, Donlon, Goddeau & Ansay, P.A.  
*Moderator: Alton L. “Rip” Colvin Jr.*, CPA, CGFO, CPM, Executive Director, Justice Administrative Commission

**Special Assessments: Options and Implementation**  
Atlantic Ballroom 1-2  
*CPE: 1.5 Hours (TB)*  
What are special assessments? How are they used? What are the benefits? This session will explore the options available and how to go about implementing special assessments.

*Speaker: Gordon Burger*, CGFO, Director of Budget & Administration Services, Charlotte County  
*Moderator: Lisa Snead*, Director of Financial Services, City of Longwood

**Debt 102: Update on Financing Options**  
Regency Ballroom 1  
*CPE: 1.5 Hours (TB)*  
This session will provide an update on bank and bond financing options in today’s market and utilizing grant options to finance your capital program.

*Speakers: Nick Ayotte*, Vice President, Public Finance, PNC Bank; *Sylvia Dunlap*, President, National Minority Consultants; and *Christopher Quinn*, CPA, CGFO, CFE, CGMA, Finance Manager, Reedy Creek Improvement District  
*Moderator: Linda S. Howard*, CPA, CTP, Chief Financial Officer, Florida Municipal Power Agency

7:00 p.m. - 10:00 p.m.  
**Tuesday Night Event**  
Gulfstream Park

9:30 p.m. - 11:30 p.m.  
**Hospitality Suite Open**  
307 (Third Floor - Main Tower)

**WEDNESDAY - JUNE 12**

7:00 a.m. - 8:00 a.m.  
**Continental Breakfast**  
Grand Ballroom Foyer

7:00 a.m. - 12:00 p.m.  
**Registration Desk Open**  
Grand Registration

7:15 a.m. - 7:45 a.m.  
**Voluntary Fellowship**  
215 (Second Floor - Main Tower)

8:00 a.m. - 9:40 a.m.  
**Lessons Learned: Control Deficiencies in Small Governments**  
Grand Ballroom  
*CPE: 2 Hours (AA)*  
Awareness of common control deficiencies in small governments may help finance and accounting professionals establish a foundation of internal controls for
preventing theft in their respective organizations. This session is designed to highlight some lessons learned from governments that experienced fraud or misappropriation of assets due to such control deficiencies.

**Speaker:** Julia Davidyan, DBA, CPA, CGAP, Internal Auditor, City of Delray Beach  
**Moderator:** Kimberly Ferrell, Finance Director, City of North Port

**The Cost of Government Services**  
Regency Ballroom 1  
**CPE:** 2 Hours (TB)

Cost of services defines every activity and service performed by each department and individual of a government branch. Those services are categorized by prosperity measures according to strong and sustainable local economy, effective public safety, life enrichment, self sufficiency and community assets, which are then broken down by unit cost to provide transparency.

**Speaker:** Jonathan Rushnak, Fiscal Analyst, Hillsborough County  
**Moderator:** Ken Sinclair, CPA, CFE, Accounting Supervisor, Broward County

**SEC Rules and Regulations**  
Atlantic Ballroom 3  
**CPE:** 2 Hours (TB)

The regulatory landscape continues to evolve for municipalities and their investment advisors. This session will explore recent SEC rulemaking, initiatives and guidance, including the Municipal Advisor Registration Rule and the IRMA exemption, as well as their impact on the industry.

**Speaker:** John F. Ramirez, Attorney, Accredence  
**Moderator:** Ian Evans-Smith, CPA, CGFO, Assistant Treasurer, City of Miramar

**Ethics**  
*(Additional and pre-registration required)*  
Atlantic Ballroom 1-2  
**CPE:** 4 Hours (Ethics)

If you are a Florida CPA working in the public sector, this course meets your ethics requirement. Through information and discussion, this course focuses on issues governmental CPAs face, such as professional standards, ethical conduct and independence.

**Speaker:** Bill Blend, CPA, CFE, Shareholder, MSL CPAs & Advisors  
**Moderator:** Alton L. “Rip” Colvin Jr., CPA, CGFO, CPM, Executive Director, Justice Administrative Commission

**9:40 a.m. - 10:00 a.m.**  
**Refreshment Break**  
Grand Ballroom Foyer

**10:00 a.m. - 11:40 a.m.**  
**Paperless Office: Opportunities and Challenges**  
Grand Ballroom  
**CPE:** 2 Hours (TB)

This session will explore the evolving options for transforming your paper-based methods into streamlined and automated processes. We will dive into the steps your office can take to digitally transform your departments, while highlighting process automation options related to electronic forms, automated workflow, ERP integrations and automated invoice processing and validation.

**Speaker:** Logan Di Liello, CDIA+, Director, MCCi  
**Moderator:** Ian Evans-Smith, CPA, CGFO, Assistant Treasurer, City of Miramar

**Performance Measures: From Development to Appraisal**  
Regency Ballroom 1  
**CPE:** 2 Hours (TB)

This session will focus on the development of performance measures using best practices through the appraisal and measurement process.
Who Me? Understanding Your Role as a 457 and 401a Plan Fiduciary
Atlantic Ballroom 3
CPE: 2 Hours (TB)
Given the increased focus and scrutiny of 457 and 401a plans, this session is designed to cover what you need to know about prudent fiduciary oversight of deferred compensation and defined contribution plans. This session will also cover topics such as governance structure, plan design, investment policy, vendor review and selection, employee education and ongoing compliance monitoring.
Thanks to Our Exhibitors
The following companies contribute to the success of the annual conference, so please be sure to visit each of them in the exhibit hall. A copy of the exhibit hall floorplan follows on page 30.

AccuFund, Inc.
Booth #203
Providing a government financial management system designed to streamline activities and financial reports.

AdComp Systems Group
Booth #700
A payment solutions technology company located in DFW Metroplex Texas.

ADG - American Data Group, Inc.
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Booth #509
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Booth #519
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Booth #103
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Public sector process automation specialists providing collaboration, experience and integrity to empower your team.

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Financial advisory firm.

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Booth #205
Retirement savings plan.

IGM Technology
Booth #809
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Booth #416
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IntegraConnect, LLC  
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Kronos  
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Governmental audit, accounting, financial reporting and consulting services.

MCCI  
Booth #504  
Offering departmental and enterprise-wide content management solutions, as well as legislative management solutions.

Milestone Professional Services, Inc.  
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MSL CPAs & Advisors  
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<th>Position</th>
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<td>BIG BEND CHAPTER</td>
<td>Mike Gomez, CPA</td>
<td>Audit Manager</td>
<td>Florida Auditor General</td>
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<td>CENTRAL FLORIDA CHAPTER</td>
<td>Kurt Petersen, CGFO</td>
<td>Manager, Office of Management &amp; Budget</td>
<td>Orange County</td>
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<td>FLORIDA FIRST COAST CHAPTER</td>
<td>Judy Garard</td>
<td>Finance &amp; Administration Manager</td>
<td>City of Jacksonville</td>
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<td>GULF COAST CHAPTER</td>
<td>Cindy Nenno</td>
<td>Administrative Services Director</td>
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<td>HILLSBOROUGH CHAPTER</td>
<td>Karen L. Keith, CGFO</td>
<td>Accounting Supervisor</td>
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<td>NATURE COAST CHAPTER</td>
<td>Marge Strausbaugh</td>
<td>Director of Finance</td>
<td>City of Belleview</td>
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<td>NORTH CENTRAL CHAPTER</td>
<td>Claudia Rasnick</td>
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<td>PALM BEACH CHAPTER</td>
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<td>Tatiana Abernathy</td>
<td>Accountant</td>
<td>Okaloosa County Sheriff’s Office</td>
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<td>SOUTH FLORIDA CHAPTER</td>
<td>Marie W. Elianor, CGFO, CPPT</td>
<td>Director of Finance</td>
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<td>SOUTHWEST FLORIDA CHAPTER</td>
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<td>Assistant City Manager</td>
<td>City of Sarasota</td>
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<td>SPACE COAST CHAPTER</td>
<td>Teri Butler</td>
<td>Retired</td>
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<td>TREASURE COAST CHAPTER</td>
<td>Judy Browning</td>
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<td>Catherine Colwell</td>
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The Certified Government Finance Officer (CGFO) Program is intended to encourage a level of knowledge and professionalism in the field of government finance. It is also intended to encourage development and maintenance of professional competence for practicing governmental finance officers. For purposes of the CGFO program, a finance officer is any individual occupying a professional level position that includes oversight and/or supervision of one or more financial functions in a government entity.

While the Florida Government Finance Officers Association certifies that individuals meeting the criteria in its professional certification program demonstrate certain competencies, FGFOA expressly withholds an opinion as to the capability of any individual to successfully perform in a given position. Prospective employers and employees must make that decision. FGFOA encourages prospective employers and employees to share information regarding the requirements of the position and the capabilities of the candidate in a forthright manner to promote sound employment and professional decisions.

Currently, FGFOA has a total of 477 CGFOS.

NEW CGFOS FOR THE 2018-2019 YEAR

Sandria Barrett-Lee, Accountant, City of Wilton Manors
Donna Brewton, Accountant III, Escambia County Clerk of Circuit Court & Comptroller
Allison Broihier, Director of Finance, City of Seminole
E. John Brower, Senior Fiscal Management Analyst, Alachua County
Amy Davis, Assistant City Manager/Finance Director, City of Treasure Island
Victor DiRamo, Accountant III, City of North Port
Alvin Hall, Management Analyst, St. Lucie County
Michele Harris, Assistant Controller, Fort Pierce Utilities Authority
Raymond Herbert II, Accounting & Budget Systems Coordinator, City of Tampa
Ann Lee, Finance/Administration Manager, Peace River Manasota Regional Water Supply Authority
Jennifer Madewell, Fiscal Resource Manager, Volusia County
Britt Martin, Financial Projects Manager, City of Cape Coral
Rosalind McCutcheon, Benefits Accountant, Broward County Public Schools
Jeanette Daniele McDaniel, Finance Officer, Jackson County Clerk of Court
Michael Mock, Financial Reporting Specialist, St. Lucie County
Jacqueline Newell, Treasury Manager, Solid Waste Authority of Palm Beach County
Obaku Nyomah, Senior Accountant, City of Jacksonville
Leslie Porter, Finance Officer, City of Dade City
Christopher Quirk, Director of Finance, Village of Tequesta
Kelli Reed, Senior Fiscal Analyst, City of Tampa
Dan Risola, Assistant Budget Director, Pasco County
Lizette Rivera, Accounting Technician Senior, City of Deltona
Kelly Schwartz, Assistant Finance Director, City of Margate
Alberto Souto, Assistant Budget Director, City of Jacksonville
Diane Wilson, Interim Finance Director, City of Gainesville
Sharon Almeida, CGFO, City of Lantana
Raymond Bailey, CPA, CIC, CRM, MAcc, Lake County Sheriff’s Office
Marcia Carty, CPA, Broward County
Cindy Emshoff, Sarasota Office of Housing & Community Development
Ian Evans-Smith, CPA, CGFO, City of Miramar
Sheila Fitzgerald, Santa Rosa County
Jennifer Danielle Heaton, Manatee County Clerk of Circuit Court & Comptroller
Mary Lou Hildreth, CMC, City of Hampton
Carlisha Jenkins, CPA, City of Boca Raton
Ann Kenny, Southwest Florida Water Management District
Melissa Licourt, St. Johns River Water Management District
Matthew Misco, CGFO, City of Palmetto
Leslie Porter, CPA, City of Dade City
Maureen Powell, Alachua County
Cintya Ramos, City of Hollywood
Franklin Santos, Orange County
Lorrie A. Simmons, MSA, CGFO, City of Sarasota
Stacy Sullivan-Marrero, CPA, Florida Municipal Power Agency
DIPLOMAT BEACH RESORT
FUTURE FGFOA CONFERENCES

2020 Annual Conference
Rosen Shingle Creek Orlando
May 30 - June 3

2021 Annual Conference
Boca Raton Resort & Spa
June 12 - 16

FUTURE FGFOA SCHOOLS

2019 School of Governmental Finance
Hilton Sandestin Beach Golf Resort & Spa
October 20 - 25

2020 School of Governmental Finance
Luminary Hotel & Co. - Fort Myers
October 18 - 23