



2021 School of Governmental Finance Proposed Schedule

| DAY | START | END | Track | Session Level | Session Title | Session Description | Speaker | Speaker Contact |
|---------|----------|----------|------------------------------------|----------------------|--|---|--|--|
| Monday | 8:00 AM | 9:40 AM | Budget | Basic/Intermediate | Budgeting Through Crisis | Learning how to budget when your expenses are increasing but your revenue is not can be difficult, but not impossible. In this session, you will learn how to trim back expenses while maintaining government services. | Peter Brill | 352-629-8250-O, 352-598-7245-C pbrill@ocalafl.org |
| Monday | 8:00 AM | 9:40 AM | Treasury & Debt | Basic / Intermediate | Financial Plan Development | Options in developing a financing plan. Reviewing refinancing opportunities for existing debt. | Jeffrey T Larson President Larson Consulting Services | 10151 University Blvd., #117 Orlando, FL 32817 407-496-1597 JLarson@larsonconsults.com |
| Monday | 10:00 AM | 11:40 AM | Accounting and Financial Reporting | Basic/Intermediate | Intro Governmental Accounting | Learn the differences between private and public accounting (Income Stmt vs. Fund Balance)*Fund Accounting*Financial Reports*DRAFT | Jeff Wolf, CPA at MSL CPAs and Advisors, Audit Senior Manager, (813) 314-2600, ext. 3303, 201 E Kennedy Blvd., Suite 650, Tampa, FL 33602 Email: jwolf@mslcpa.com | c/o Brenda Fairfoot, Audit Senior, MSL CPAs & Advisors 407-740-5400, ext. 1130, 255 S Orange Avenue, Suite 600, Orlando FL 32801 bfairfoot@mslcpa.com |
| Monday | 10:00 AM | 11:40 AM | Financial Management & Leadership | Basic/Intermediate | Building Blocks of Financial Management | There are four building blocks which must be in place to achieve best practice in the government sector. Every organization must keep accurate accounting records of its financial transactions, create an organization's strategic and operational plan, internal budget monitoring and an effective internal control system. | Susan Gooding-Liburd, MBA, CPA, CGFO, Chief Financial Officer | Office of the City Manager City of Miramar 2300 Civic Center Place, Miramar, FL 33025 O: 954.602.3116 sagooding-liburd@miramarfl.gov |
| Monday | 1:00 PM | 2:40 PM | Budget | Basic/Intermediate | GFOA Budget Award | What you need to know about the GFOA Budget Award Program and the recent changes to the criteria | Mark Welch | OpenGov Solutions Engineer mwelch@opengov.com |
| Monday | 1:00 PM | 2:40 PM | Treasury & Debt | Basic / Intermediate | Using Your American Rescue Funds - Ready, Set, Go! | American Rescue Funds - real-time guidance as to dealing with the American Rescue Funds. Interactive panel discussion format | Lourdes Abadin Abadin@ehmuni.com Jaclyn Mesa JMesa@ehmuni.com | Steven W. Eaddy Executive Vice President Public Finance Estrada Hinojosa & Co., Inc. 55 Merrick Way, Suite 215 Coral Gables, FL 33134 (305) 507-0100 Office (212) 946-4925 direct (917) 843-4436 cell |
| Monday | 3:00 PM | 4:40 PM | Financial Management & Leadership | Basic/Intermediate | Leadership in Action- Be the Change Agent | Whether you are new to leadership or have been leading for a while the concept of change is a scary one and one that most people avoid. And either way, change is a must, and changing gracefully is a skill. In this session, learn how to lead through change and create buy-in from your team and your colleagues. Participation in this highly interactive session will allow you to become more connected to other emerging and seasoned leaders of the FGFOA. Come explore your leadership abilities and see how you can impact this amazing organization! | Nicole Gaspari, Program Development Manager | Boca Raton, Florida NGasparri@ci.boca-raton.fl.us (561) 367-7040 |
| Monday | 3:00 PM | 4:40 PM | Budget | Basic/Intermediate | Budgeting 101 | This session will cover the basic principles of budgeting for governments, everything from the players involved to adoption. This session will also focus on the factors to consider when developing the budget as well as the challenges that arise. | TBD | |
| Tuesday | 8:00 AM | 9:40 AM | Accounting and Financial Reporting | Basic/Intermediate | Community Redevelopment Agency (CRA) "new and Scary" Financial Guidance - How a Local Government Can Manage the CRA, Receive a Clean Audit Opinion and Not be Terminated | The Community Redevelopment Act authorizes a county or municipality to create a community redevelopment agency as a means of redeveloping slums and blighted areas. CRAs are controlled by a governing board that either is composed of members of the local governing body creating the CRA or commissioners appointed by the local governing body. CRAs operate under a community redevelopment plan that is approved by the local governing body and are primarily funded by tax increment financing, calculated based on the increase in property values inside the boundaries of the | Marcia Carty, Finance Director of the City of Quincy and Robert Nixon, CRA Director, City of Quincy | |
| Tuesday | 8:00 AM | 9:40 AM | Financial Management & Leadership | Basic/Intermediate | Performance Management | So you have a Strategic Plan, now what? The best ways to achieve success is through deliverables that are SMART. Come check out a City that is known for Performance Management and is willing to share metrics and a proven process. | Catherine Givens, Assistant City Manager | City of Coral Springs, Florida cgivens@coralsprings.org |
| Tuesday | 10:00 AM | 11:40 AM | Accounting and Financial Reporting | Basic/Intermediate | Grant Accounting | This session covers topics related to accounting for grants commonly received by local governments. The objective of this session is to learn about the various types of grants and how and when to recognize associated revenue along with best practices for fiscal grant management. | April Shuping, CPA Partner at Carr, Riggs Ingram (CRI) CPAs | Ashuping@cricpa.com 4010 NW 125th Place, Gainesville, FL 32606 Voice: 352-548-3618, Fax: 352-337-4618, CRAcpa.com |
| Tuesday | 10:00 AM | 11:40 AM | Budget | Basic/Intermediate | TRIM Requirements for the Budget | The Truth in Millage (TRIM) process is the most important topic that Budget staff need to understand. This class will cover step by step everything you need to know from beginning to end. | Greg James & Brandy King | Clerk of Courts & Comptroller Wakulla County 850-926-0325 gjames@wakullaclerk.com bking@mywakulla.com |
| Tuesday | 1:00 PM | 2:40 PM | Budget | Basic/Intermediate | Budgeting for the Cost of Remote Working | With more agencies opting to allow their employees to work remotely, what effect does this have on the Operating & Capital Budgets | TBD | |
| Tuesday | 1:00 PM | 2:40 PM | Financial Management & Leadership | Basic/Intermediate | Best Practices for Writing Successful Grant Proposals | As finance professionals, we look to help save money for our communities and citizens, grants are a great way to this, but it doesn't just stop at applying. Here is step by step from application, to closing out the grant, the dos and don'ts to make sure we stay compliant! | Valerie Malingowski, Grant Writer | City of North Port, City Manager's Office vmalingowski@cityofnorthport.com (941) 429-7001 |
| Tuesday | 3:00 PM | 4:40 PM | Accounting and Financial Reporting | Basic/Intermediate | Where to Find Answers to Questions Using Government Accounting & Compliance Resources | This session will help train staff to improve their government accounting research Skill-set in answering questions that arise during the year and for the annual audit. Critical thinking skills are needed to assist in locating the answers using the resources from GASB, GFOA, FGFOA, State of Florida and FASB. | Bert Martinez, Sr Audit Mgr Purvis Gray CPAs | |



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| Tuesday | 3:00 PM | 4:40 PM | Treasury & Debt | Basic / Intermediate | Investment Policy & Strategies | Understanding Key Investment Terminology. Review of Investment Policy Requirements. Best Practices Public Funds Investments. | Jeff Kern, Vice President Sales and Relationship Mgt. PMA Financial Network, LLC Rene O'Day, Vice President | JKern@pmanetwork.com (941) 356-9516 RODay@pmanetwork.com (407) 797-8228 PMA Financial Network, LLC 7380 Sand Lake Rd., Suite 650 Orlando, FL 32819 |
| Wednesday | 8:00 AM | 9:40 AM | Accounting and Financial Reporting | Basic/Intermediate | Grant fraud, public corruption and how to fight fraud on a limited budget. | HUD funds often intersect with grant fraud and public corruption. This presentation will focus on the types of HUD programs most susceptible to public corruption and provide insight into fighting fraud on a limited budget, focusing on practices that are less about money and more about attitude. Case examples are included. | Special Agent Jamila Davis, M.S, CFE, CFCI, CECFE | United States Department of Housing and Urban Development, Office of Inspector General 813-596-5764 (Office) JDavis@hudoig.gov |
| Wednesday | 8:00 AM | 9:40 AM | Budget | Basic/Intermediate | Utilizing Impact Fees | Considerations, methods, and key issues related to the various types of Impact Fees (with case studies). | Leticia Doohaluk | Managing Consultant Stantec 813-269-6010 leticia.doohaluk@stantec.com |
| Wednesday | 10:00 AM | 11:40 AM | Accounting and Financial Reporting | Basic/Intermediate | What's New in your Chart Accounts | New to Florida, new to Government and what's new June 2020 in the Florida COA? Come to review and dialogue about why, when ,where - open discussion! | Andrew Laflin, President Aclarian LLC | |
| Wednesday | 10:00 AM | 11:40 AM | Treasury & Debt | Basic/Intermediate | Get Your Secret Anti-Decoder Ring: - Bank Relationship Management? Guiding You Through the Bank's Account Analysis Statement | Learn how to navigate an account analysis statement to optimize your banking relationship. Banking services is an important cornerstone of cash management for local governments. These services are itemized on an Account Analysis Statement with little explanation on what the service is or what benefit it offers. This session will navigate an Account Analysis Statement in a highly interactive manner to show you what to look for when reviewing your entity's Account Analysis Statement. This session will also highlight new services and ideas to improve efficiency and tips to maximizing your banking relationship. | Dave Calvert CalvertD@pfm.com | Dave Calvert PRM Asset Management LLC |
| Wednesday | 1:00 PM | 2:40 PM | Financial Management & Leadership | Intermediate / Advanced | Successful E-Working | How to implement a successful e-working program under pressure and get management and local citizen buy-in despite negative public perception. | Kate Parmelee, Director of Strategic Initiatives & Innovation City Manager's Office | City of Port St. Lucie kparmelee@cityofpsl.com |
| Wednesday | 1:00 PM | 2:40 PM | Accounting and Financial Reporting | Intermediate/Advanced | Catch me if you can! Taking a Deep Dive into the Components of the Fraud Triangle. | To fight fraud one must not only realize that it occurs, but also how and why it occurs. For fraud to occur, all three elements of the fraud triangle which include opportunity, pressure and rationalization must be present. In this session, we will review the causes of fraud through the lenses of the fraud triangle; identify fraud risk factors as a component of the internal control framework; and identify the cost of fraud and ways to prevent and detect fraud. You will also have the opportunity to apply the concepts learned to actual case studies. | Beth (Jeanna Elizabeth) Horacek, UG | |
| Wednesday | 3:00 PM | 4:40 PM | Accounting and Financial Reporting | Intermediate/Advanced | Bridging the GAAP | The preparation of a government's external financial statements can be quite complex and challenging for a variety of reasons. Among those reasons are the concepts of reporting entity, measurement focus and basis of accounting. In this session, we will "bridge the GAAP" between the governmental fund level statements and government-wide financial statements. | John Hulsey, UG | |
| Wednesday | 3:00 PM | 4:40 PM | Treasury & Debt | intermediate / Advanced | Don't Be at a Loss - Communicating the Portfolio Proactively | There aren't many topics that can tongue tie a portfolio manager responsible for investing public funds quicker than having to explain to stakeholders a portfolio loss. This session prepares participants to view losses not as something to be avoided but as essential to good stewardship. | Ben Finkelstein, Managing Director / Public Funds, Cantor Fitzgerald, BeFinkelstein@cantor.com (281) 381-2740 | |
| Thursday | 8:00 AM | 9:40 AM | Accounting and Financial Reporting | Intermediate/Advanced | Single Audit Update and the ARPA American Rescue Plan Act | As if there haven't been enough developments in the past 12 months related to CARES Act funding for local governments, the picture grows more complex following the passage of the American Rescue Plan Act (ARPA). This session will provide a general update on the Federal single audit landscape, debrief on what we learned last year from CARES Act funding, and detail what we now know about ARPA. | James Halleran and Zach Chalifour, James Moore CPA and Consultants | |
| Thursday | 8:00 AM | 9:40 AM | Financial Management & Leadership | intermediate / Advanced | Development of strategic, financial, economic and business plans for local government enterprises | Your bond rating from the rating agencies is an assessment of how risky it is to provide funding to your enterprise. One way to show these agencies your enterprise will remain fiscally sound is to develop and adopt strategic, financial, economic, and business plans. With the uncertainty of the near future from a financial perspective, presenting these plans effectively can help convince the rating agencies that your enterprise is worthy of a high credit rating and lower interest rate. | Bryan Mantz, CMC, CGFM, President Carrie Grein, MAcc, CMA Senior Financial Division Manager | GovRates, Inc. bmantz@govrates.com Environmental Services Department, Business Office Seminole County Environmental Services 407-665-2148 cgrein@seminolecountyfl.gov |
| Thursday | 10:00 AM | 11:40 AM | Accounting and Financial Reporting | Intermediate/Advanced | GASB Update | A discussion of GASB changes, and proposed changes. A look at some of the most recently implemented standards and issues around changes that are being proposed. With the expiration of the delays on implementation of standards due to the coronavirus, several standards are being implemented in 2021 or 2022. There are also several items on the GASB agenda that are in deliberations for issuance. | Dr Reck, USF | |
| Thursday | 10:00 AM | 11:40 AM | Financial Management & Leadership | Intermediate/Advanced | | | | 321-426-3014 yclayborne@cricpa.com |



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| Thursday | 1:00 PM | 2:40 PM | Budget | Intermediate / Advanced | Long Term Financial Sustainability | Where is the money coming from and is there significant cash flow? How to budget for long term capital and not go broke. | Bradley Arnold | County Administrator Board of Sumter County Commissioners 352-689-4400 bradley.arnold@sumtercountyfl.gov |
| Thursday | 1:00 PM | 2:40 PM | Accounting and Financial Reporting | Intermediate / Advanced | Cyber Security, Phishing, Ransomware | Cybersecurity, phishing, ransomware | Clifton Larson Allen | c/o Katherine M Woodruff |
| Thursday | 3:00 PM | 4:40 PM | Treasury & Debt | Intermediate / Advanced | Portfolio Doctor - Practical Ways to Improve Your Investment Portfolio | Different ways to invest - potential changes on the horizon. The end of Labor. How to pick up more yield with callable; available alternatives to improve your investment portfolio. Don't chase or guess... Practical tools to apply with your portfolio. | David Jang, Brent Wertz, Benjamin Steed | David Jang, Managing Partner, Water Walker Investments Direct Line: 407-618-4269 david@aterwalkerinvestments.com brent@waterwalkerinvestments.com benjamin@waterwalkerinvestments.com |
| Thursday | 3:00 PM | 4:40 PM | Accounting and Financial Reporting | Intermediate/Advanced | Presenting Financial Information to Non-financial People | Finance officials are tasked with presenting your entity's financial information to the decision makers, who may not have a financial background. This course is designed to help you "identify financial distress/crisis within your government", evaluate your government's financial report card, and effectively educate the decision makers through its presentation to help achieve the desired outcomes | Trey Scott, CPA/Partner and Daniel Anderson, CPA/Director - Mauldin Jenkins CPAs | |
| Friday | 8:00 AM | 9:40 AM | Financial Management & Leadership | Intermediate/Advanced | Coaching and Mentoring | The ability for leaders to coach and mentor is critical for a positive work environment. Mentoring and coaching is about much more than just telling someone what to do-it requires working with employees to make decisions, solve problems and develop skills. | Doug Thomas Senior Vice President Strategic Government Resources | PO Box 1642 Keller, TX 76244 cell: 863-860-9314 office: 817-337-8581 DouglasThomas@GovernmentResource.com |
| Friday | 8:00 AM | 9:40 AM | Treasury & Debt | Intermediate/Advanced | Economic Update | Economic Update with focus on ESG and Fixed Income - potential impact on public investments. Sensitivity to certain investments. | John Grady III CTP, Managing Director, Public Trust Advisors | John.Grady@publictrustadvisors.com (407) 514-2727 |
| Friday | 10:00 AM | 11:40 AM | Budget | Intermediate/Advanced | Impact of Remote Working on Local Communities | This session will cover how the move from metro areas to small town due to remote working, has impacted property values, tax revenues, and need for services (water, sewer, trash, first responders). | TBD | |
| Friday | 10:00 AM | 11:40 AM | Financial Management & Leadership | Intermediate/Advanced | Resilient leaders learn from past leadership opportunities to help overcome inevitable uncertainty and unprecedented change. | How willing are you to change? As a seasoned leader, 2020 pushed all of us to adjust our thinking and adapt to a new way of operating. For some of us that change was dramatic, and even traumatic, yet we had no choice. In this ever evolving world, change is inevitable and yet it is rarely embraced. Now more than ever, we must be proactive, adaptable, and innovative. In this session we will explore Organizational Change Management, its impact on stakeholders and leadership as well as innovations that have and will support the change. Come prepared for an interactive session on how to lead change into the future! | Shannon Chief Deputy Clerk Clerk of the Circuit Court & Comptroller Nicole Gaspari, Program Development Manager | Palm Beach County, Florida SRChessman@mypalmbeachclerk.com 561-355-2996 Boca Raton, Florida NGasparri@ci.boca-raton.fl.us (561) 367-7040 |