



CGFOA 2017 Annual Conference
November 14 – 17, 2017
Hotel Elegante' Conference and Resort Center
Colorado Springs, Colorado

Tuesday, November 14, 2017

Time: 8:00 AM – 9:45 AM

Title: **Excel Tips & Tricks**

Level: All

Track: *Pre-conference*

Description: We'll be covering tips, tricks, and shortcuts that can be used on a daily basis when working in Excel, so that users can save time, experience less frustration, and feel more tech-savvy.

Speaker: Rachel Deckert, City of Boulder;

Moderator: Gina Coluzzi, City of Boulder

Time: 8:30 AM – 12:00 Noon

Title: **CPFO Exam** – Register through GFOA

Time: 10:15 AM – 12:00 Noon

Level: All

Title: **GASB Update**

Track: *Pre-conference*

Description: This years GASB Update will cover an array of new pronouncements, upcoming changes, and what GASB is working on for the future.

Speaker: Paul Niedermuller, CliftonLarsonAllen, LLP

Moderator: Catrina Asher, Boulder County

Time: 10:15 AM – 12:00 Noon

Title: **Excel-Data Manipulation & Analysis**

Level: Intermediate

Track: *Pre-conference*

Description: This session builds on the preceding session (Excel Tips and Tricks) by introducing attendees to some of most commonly used data manipulation and analytical tools built into Excel. This is an interactive training and attendees should plan to bring laptops.

Speaker: Devin Billingsley, City of Boulder;

Moderator: Rachel Deckert, City of Boulder

Time: 12:00 – 12:45 PM

Lunch on Your Own



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Time: 12:45 – 2:30 PM

Title: **Excel-Pivot Tables & Dashboards**

Level: Advanced

Track: *Pre-conference*

Description: This session builds on the preceding sessions (Excel Tips and Tricks and Data Manipulation and Analysis). In this session, attendees will learn how to create and modify pivot tables and use that data to build dashboards for enhanced visualization. This is an interactive training and attendees should plan to bring laptops.

Speaker: Gina Coluzzi, City of Boulder;

Moderator: Devin Billingsley, City of Boulder

Time: 12:45 – 2:30 PM

Title: **Psychology of Ethics**

Level: All

Track: Pre-conference

Description: This continuing education program supplements the traditional and standard regulatory ethics curriculum by focusing on The Psychology of Ethics – recognizing and understanding the internal forces, influences, factors, thoughts, beliefs, and feelings that occur when ethical dilemmas arise in one's professional practice. The program is presented in a highly interactive, thought provoking and memorable manner. It offers pragmatic ethical frameworks and strategies for dealing with ethical conflicts and counseling others.

Speaker: Louie Larimer, Colorado Society of CPAs

Moderator: Catrina Asher, Boulder County

Time: 1:00 – 4:30 PM

Title: **CPFO Exam** – Register through GFOA



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3:00 – 5:00 PM

Social Events

\$\$ Olympic Training Center Tour (\$10.00) Once every two years, most of us are lucky enough to witness the talent, skills and determination of the world's top athletes competing in the summer and winter Olympic Games. These mere moments of athlete's lives are built upon years of dedicated training, injuries, failures, successes and gallons of sweat and tears. The United States has three Olympic Training Centers where many athletes live and train in hopes of someday stepping onto the podium. Aron McGuire, the director of the Colorado Springs Olympic Training Center, acknowledges visiting as "an opportunity for someone that may not go to the games to really get that Olympic experience."

The center's entrance acts as an artifact emporium and offers a trip down memory lane as visitors gaze upon the torches, ice skates, medals, a bobsled and other paraphernalia used in past Olympic Games. Guided tours are led year round and begin with a video of highlights from previous games and an exciting glimpse of what lies ahead. Visitors tour various facilities around the 35-acre complex and often catch athletes in training.

\$\$ Glen Eyrie Castle and Grounds Tour (\$10.00) From the rich heritage of General Palmer, Colorado Spring's founder, to the deep spiritual legacy of The Navigators, this guided Historical Tour will take you on a journey filled with stories of rival turn-of-the century railroad wars and oil tycoons to what is now the soul-stirring property of Glen Eyrie.

The Historical Tour includes a brief video filled with history of General Palmer and The Navigators, and a Guided Walking Tour through the Carriage House and the first and second floors of The Glen Eyrie Castle. TrainedTour Guides will entertain you with stories of the Palmer family, Glen Eyrie Estate, unique architecture of The Castle, surrounding landscape, and Colorado Springs history.

For over a century, Glen Eyrie has been a place of stunning beauty, profound history, and awe-inspiring grandeur. Join us for a Historical Tour where your journey will be more than educational, it will be unforgettable!

\$\$ Air Force Academy Chapel and Grounds Tour (\$10.00) The Barry Goldwater Air Force Academy Visitor Center serves as the gateway to the United States Air Force Academy for hundreds of thousands of tourists each year. The center provides information on Academy history, cadet life and campus attractions. Join us for a tour of the Air Force Academy Chapel, grounds, museum and theatre!



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\$\$ Bristol Brewery & Pub/Ivywild School (\$10.00) Ivywild School is a place where neighbors, friends, colleagues and visitors can meet and mingle. A place where you can enjoy great local fare and share ideas. But it's also much more than that. It's a flourishing communal atmosphere linking commerce and community with gathering spaces, local cuisine, education, art and gardens. Formerly an elementary school, Ivywild's façade still holds true to its roots as reimagined spaces fill the halls once again with the voices of children and adults alike.

Bristol Brewing has been a part of the Colorado Springs fabric since 1994 when Mike and Amanda Bristol decided to start hand-brewing fresh, award-winning ales for the people of Colorado. With five flagship beers plus seasonal and specialty beers, quality and flavor drive everything at Bristol.

Bristol is also driven by giving back to the community. In fact, it is by design that Bristol's beers are still only available in Colorado. They believe in local breweries and their ability to build community, which is one of the reasons Bristol Brewing decided to revitalize and move in to the old Ivywild School. That community mindfulness is the reason behind their Community Ale program as well. They donate 100% of the proceeds to support local causes that contribute to the quality of life in Colorado Springs. After all, the Bristols live here too!

Garden of the Gods Hike (weather permitting)

For active folks who love hiking, there are 15 miles of trails to explore in the Garden of the Gods. Join an organized group for a few hours of hiking at Garden of the Gods. Then enjoy a stop at the Nature Center and Gift Shop.

Time: 5:15 PM

Moderator/Volunteer Training

Time: 6:30 – 9:00 PM

Opening Ceremonies (Opening Event) at Hotel Elegante'

Description:



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Time: 7:00 - 8:00 AM

Breakfast – Hot Buffet

Time 8:00 – 9:45 AM

Title: **Becoming Unstoppable: Success Secrets of a Four-time Olympian**

Track: *General Session* Level: *All*

Description: Ruben Gonzalez brings us an entertaining presentation sprinkled with humor, motivation and content that deals with simple, yet profound ways each person can deal with the challenges they face daily. It will make you laugh, think and walk away with ideas you can put to use immediately.

A seemingly “ordinary guy,” Ruben wasn’t a gifted athlete. He didn’t take up the sport of luge until he was 21. Against all odds, four years later he was competing in the Winter Olympics. At the age of 47 he was racing against 20-year-olds in the Vancouver Olympics becoming the first person to ever compete in four Winter Olympics each in a different decade.

Ruben’s appeared nationally on ABC, CBS, and NBC. He’s been featured in Time Magazine, BusinessWeek, The New York Times as well as publications in Canada, Germany, Switzerland, France, Austria, Italy, UK and Argentina. His articles on peak- performance are read in every continent.

He speaks all over the world sharing his insights and principles in the areas of success, leadership, sales, team building and mental toughness. His material is always fresh and well-researched as he reads 2-3 books every month to stay current and increase the knowledge base from which he speaks.

Ruben is the author of several bestselling books. A special autograph table will be available for those who would like to take a part of the presentation home with them to reinforce what they hear during the presentation.

Speaker: Ruben Gonzalez, The Luge Man

Moderator: Jeff Edwards, City of Aurora

Time 9:45 – 10:15 AM

Break



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Time: 10:15 AM – 12:00 Noon

Title: **Audit Preparedness**

Track: *Accounting and Grants* *Level: All*

Description: This course will help governmental personnel effectively and efficiently prepare for their annual audit. The course will provide suggestions and tools that can be used to enhance communication with your auditors during the audit fieldwork and throughout the year to avoid surprises and delays in report issuance.

Speaker: Tyra Litzau, Anton Collins Mitchell LLP

Moderator: Angela Diekhoff, Little Thompson Water District

Time: 10:15 AM – 12:00 Noon

Title: **Considering a Move to Home Rule?**

Track: *CTAC* *Level: Basic*

Description: Statutory municipalities are limited to exercising those powers that have been granted by the state and subject to those provisions and limitations that have been imposed by the state. Article XX of the Colorado Constitution allows municipalities to regulate local and municipal matters.

This session is intended for statutory municipalities that are considering becoming home rule. It will provide a history of home rule in Colorado, requirements to become home rule, and authorities of home rule municipalities.

One important authority of home rule is the financial authority and the ability to collect and enforce sales/use taxes. The session will also provide an account of how the City of Centennial transitioned from state-collection to self-collection of sales tax.

Speakers: Maureen Juran, Widner Juran LLP; City of Centennial; Jeff Cadiz, City of Centennial

Moderator: Jeff Edwards, City of Aurora



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Time: 10:15 AM - 12:00 Noon

Title: **Local Government Investment Pool Ratings and Trends**

Track: *Investments and Banking*

Level: *Basic*

Description: This will be a panel of government finance officers discussing their experiences and advise to properly and efficiently invest public funds. Each panel member will field questions and provide and answers to pertinent issues regarding investing public funds.

Speakers: Justin Petrone, Boulder Valley School District ; Linda Gregory, City of Centennial; Paul Weissman, Boulder County; Mike Shannon, City of Aurora; Byron Jefferson, South Adams County Water & Sanitation District; Joel Friedman, Public Trust Advisors

Moderator: Ben Mendenhall, Public Trust Advisors

Time: 10:15 AM – 12:00 Noon

Title: **Economic Development**

Track: *Public Engagement*

Level: *All*

Description: Alan Krcmarik, Executive Fiscal Advisor for the City of Loveland will take you through the process of coordinating a multi city economic development project in Northern Colorado.

Speaker: Alan Krcmarik, City of Loveland

Moderator: Bob Krug, Morgan Stanley CSAFE

Time: 10:15 AM – 12:00 Noon

Title: **Disaster Cost Recovery - how to maximize your cost recovery reimbursements**

Track: *Accounting and Grants*

Level: *All*

Description: This session will explore topics that Finance Departments must consider regarding disaster events, including learning about multiple funding sources and their compliance requirements, and how to respond to and work with other departments and agencies during the recovery. Panel participants each have worked for communities that were significantly altered by floods and/or fires.

Speakers: Catrina Asher, Boulder County; Christy Crosser, C2 Strategies; Kristyn Unrein, Boulder County

Moderator: Steve McFarland, City of Lafayette



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Time: 10:15 AM – 12:00 Noon

Title: **Effective Coaching and Mentoring**

Track: *Professional Development*

Level: *Basic*

Description: Developing and retaining staff is a key success factor for any efficient, successful team. We will hear from management experts on best practices for coaching and mentoring our staff, how to develop a coaching culture, how to use mentoring to help reduce talent turnover, and what these experts have done to find success through coaching their teams.

Speakers: Frank Johnson, Vail Mountain Lodge; Brent McFall, Eagle County (Retired); Kathy Hodgson, City of Lakewood

Moderator: John Lewis

Time: 12:00 Noon – 1:00 PM

Lunch

Introduction of Gold and Opening Event Sponsors

Time: 1:00 – 2:00 PM

Vendor Hour

Time: 2:00 – 3:00 PM

Title: **Practical Considerations for Internal Controls in an Electronic Environment**

Track: *Accounting and Grants*

Level: *Basic*

Description: This session will cover the history of internal controls and the value they bring to your organization, help you determine how recent trends in internal controls can strengthen your internal control environment, and way to help ensure controls remain strong as organizations transition from a manual to automated environment.

Speaker: Allison Slife, CliftonLarsonAllen LLP

Moderator: Anne Penney, City of Boulder



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Time: 2:00 – 3:00 PM

Title: **Budgeting and Financing your Capital Needs**

Track: *Budget*

Level: *All*

Description: No budget can fund every capital request. Therefore, capital budgeting requires that governments understand community priorities, appropriately assess needs, prioritize requests, and deliver completed projects. This session will provide best practices and examples on how to balance the prioritization of needs and available funding options, and analyze the potential impacts of capital projects on the operating budget.

Speakers: Deb Hinsvark, Ehlers & Associates; Kim Weber, City of Steamboat Springs

Moderator: Matthew Dempsey, Ehlers & Associates

Time: 2:00 – 3:00 PM

Title: **Preparing for Depositions & Hearings**

Track: *CTAC*

Level: *All*

Description: Tips from an experienced attorney who has prepared numerous cities' tax and finance staff to participate effectively in depositions and hearings related to tax controversy.

Speaker: Paul Godec, Kissinger & Fellman, P.C.

Moderator: Curt Osborne, City of Boulder

Time: 2:00 – 3:00 PM

Title: **Going All-in On Social Media**

Track: *Public Engagement*

Level: *All*

Description: As social media continues to evolve, you hear how local governments can benefit from going all-in on social! This session will also dive into tools and tactics to maximize citizen engagement. As technology changes, communicating “with” citizens is more important than communicating “to” them.

Speakers: Timothy Martin, GFOA; Laura Savage, Pueblo West Metro District

Moderator: Tammy Nordyke, Pueblo West Metro District



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Time: 2:00 – 3:00 PM

Title: **Navigating Credit Card Security Compliance (PCI DSS)**

Track: *Investments and Banking*

Level: *Basic*

Description: Learn security requirements for credit card processing to protect your organization and your consumers.

Speaker: Rob Rudloff, RubinBrown, LLP

Moderator: Jennifer Ulrich, RubinBrown, LLP

Time: 2:00 – 3:00 PM

Title: **GFOA – Getting Involved!**

Track: *Professional Development*

Level: *All*

Description: Have you ever wanted to know more about GFOA and how to get involved? There are many ways to be a part of our organization on a local and national level. This session will cover a variety of opportunities, including standing committees, conferences, caucuses and more. We will also talk about how getting involved can benefit the industry as well as you and your organization. Local CGFOA involvement will be covered briefly as well.

Speakers: Bob Eiche, City of Boulder; Catrina Asher, Boulder County; Bryan Kidney, City of Lawrence, Kansas

Moderator: Catrina Asher, Boulder County

Time: 3:00 – 3:30 PM

Break

Time: 3:30 – 5:15 PM

Title: **Interactive Transparency Tools**

Track: *Public Engagement*

Level: *Basic*

Description: By redefining transparency (death of the PDF), Douglas County is leveraging public data as a strategic community asset and providing it as a service. We are building solutions to make government data accessible, useful, and personally relevant to residents and businesses alike.

Speaker: Diane Holbert, Douglas County

Moderator: Ned Connolly, Chandler Asset Management



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Time: 3:30 – 5:15 PM

Title: **Somewhere Over the Rainbow: Standardized Definitions Ordinance Drafting to Get the Gold**

Track: *CTAC*

Level: *All*

Description: A statewide collaborative sale tax simplification project is underway! The Colorado Municipal League is encouraging the state's 70 home rule municipalities that self-collect local sales tax to adopt standardized sales tax definitions to simplify compliance for businesses operating in multiple Colorado jurisdictions. Come join a panel discussion on how to draft a revenue neutral ordinance adopting the standardized definitions. Learn how to propose ordinance changes, which do not constitute a change in tax policy and do not require a TABOR vote, from city attorneys and tax administrators who have assisted municipalities in successfully adopting the standardized definitions.

Speakers: Hilary M. Graham, Hoffman, Parker, Wilson, & Carberry, P.C.

Trevor Vaughn, City of Aurora; Geoff Wilson, Murray Dahl Kuechenmeister Renaud, LLP

Moderator: Danielle C. Tuscher, City of Brighton

Time: 3:30 – 5:15 PM

Title: **Role of GIS in Capital Asset Financial Planning and Reporting**

Track: *Accounting and Grants*

Level: *Basic*

Description: Geographic Information Systems, or GIS, can play a major part in both financial reporting and capital asset planning for local governments. During this session, we'll walk you through the benefits of using a GIS system to assist in the financial reporting and capital asset planning for local governments, as well as hear the City of Golden, Colorado, speak about their experiences using GIS capabilities.

Speakers: Paul Niedermuller, CliftonLarsonAllen LLP; Jeff Hansen, City of Golden

Moderator: Allison Slife, CliftonLarsonAllen LLP



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Time: 3:30 – 5:15 PM

Title: **Role of the Municipal Advisor**

Track: *Investments and Banking*

Level: *All*

Description: Do you understand the role the municipal advisor plays in the issuance of debt? During this session, experts will explain the role a municipal advisor fulfills in the process of issuing debt, GFOA Best Practices regarding the use of a municipal advisor, requirements imposed on municipal advisors under Dodd-Frank, and the purpose of using a municipal advisor. Speakers include market participants as well as debt issuers who will share their perspectives and experiences with municipal advisors.

Speakers: Matthew Dempsey, Ehlers & Associates; Paul Wisor, Kline Alvarado Veio, P.C.; Gina Lanier, Aurora Public Schools; Troy Bernberg, UMB Bank; Aaron Oberg, Aurora Public Schools

Moderator: Matthew Dempsey, Ehlers & Associates

Time: 3:30 – 5:15 PM

Title: **Citizen Involvement in the Budget Process**

Track: *Budget*

Level: *Basic*

Description: Find out ways that governments have successfully involved citizens in the budget process. You will hear what methods were successful and what organizations would do differently. Learn about the various tools that organizations are utilizing to effectively gather feedback from citizens.

Speakers: Timothy Martin GFOA; Chris Lindsey, City of Westminster; Carly Lorentz, City of Wheat Ridge

Moderator: Stephanie Novello, City of Golden



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Time: 3:30 – 5:15 PM

Title: **Managing, Normalizing, and Owning Conflict**

Track: *Professional Development*

Level: *All*

Description: As a consultant transitioning organizations through major leadership change, Jenn has encountered a wide variety of employment conflict – both productive and disastrous. As a result, she's committed to sharing the lessons she's learned firsthand. This session will explore the benefit of conflict and the role we play in successfully addressing it. We will introduce methods to proactively approach interpersonal struggles and tools to reduce unproductive conflict. Due to the high personal and intuitional cost of unresolved or unaddressed conflict, it's an essential topic for any organization.

Speaker: Jenn Underwood, Independent Educator

Moderator: Camille Accountius, Boulder County

Time: 5:30 PM

Dinner On Your Own



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Time: 7:00 – 8:00 AM

Breakfast – Hot Buffet

Time: 8:00 – 9:45 AM

Title: **Generations Thriving Together**

Track: *Professional Development* *Level: All*

Description: How do you effectively partner with people who share different attitudes toward work, different styles of communication or different approaches to work? This session explores some of the benefits of intergenerational partnerships in the workplace. Come discover unique strategies and tips to build connections, despite our differences, and thrive together!

Speaker: Karen Main, Innovations in Training

Moderator: Rachel Deckert, City of Boulder

Time: 8:00 – 9:45 AM

Title: **Process Mapping and Automation**

Track: *Budget* *Level: All*

Description: Reducing costs and improving efficiency and productivity are all paramount in today's organizations. Mapping and streamlining existing processes can assist teams in achieving these goals. This interactive workshop helps participants learn how to examine their processes, streamline them, and create efficiencies wherever possible. Participants will return to the workplace with an 8-step process and a process mapping tool they can apply immediately to enhance their work flow.

Speaker: Phyllis Lundy, Lundy Professional Development Resources, Inc.

Moderator: Judy Dahl, Little Thompson Water District



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Time: 8:00 – 9:45 AM

Title: **Marketplace Fairness - Where We've Been and Where We're Going**

Track: *CTAC*

Level: *Basic*

Description: Fifty years after Bellas Hess, and twenty-five years after Quill, the retail world is a very different place today. This session will focus on the history of the Marketplace Fairness Act and will offer perspectives from taxpayers and municipalities alike. Join our panel members to discuss what makes our marketplace unfair and explore details about the Act from various points of view. Take a step forward into the future and hear why Marketplace Fairness may or may not be a solution to an evolving problem. How does any possible solution impact Colorado's complex tax structure and home rule municipalities?

Speakers: Linda Quade, Town of Parker; Bruce Nelson, EKS&H Audit | Tax | Consulting; Geoff Wilson, Murray Dahl Kuechenmeister Renaud, LLP

Moderator: Brandy Zink, Town of Parker

Time: 8:00 – 9:45 AM

Title: **Grants Management**

Track: *Accounting and Grants*

Level: *All*

Description: This session will cover grant management and compliance requirements under the Uniform Guidance, including changes/updates under Uniform Guidance, internal controls, common findings and grants management best practices.

Speaker: Tyra Litzau, Anton Collins Mitchell LLP

Moderator: Krista Shockley, Anton Collins Mitchell LLP



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Title: **Financing Strategies: Case Study - Park County**

Track: *Investments and Banking* Level: *All*

Description: Attendees will learn which financing strategy such as equipment leasing, direct purchase or bank loans, certificates of participation or voter approved debt is best suited to meet their upcoming capital improvement needs. Integrated into the learning material will be a case study involving the issuance of Certificates of Participation for Park County's new Administrative Building detailing how they got the project off the ground, initial expectations compared to the realities of the transaction and what they would have done differently.

Speakers: Jim Manire, FirstSouthwest; Nate Eckloff, RBC Capital Markets; Dan Lynch, Kutak Rock, LLP; Tom Eisenmann, Park County; Cindy Gharst, Park County

Moderator: David May, J.P. Morgan Chase

Time: 8:00 – 9:45 AM

Title: **Communicating Financial Info to Elected Officials**

Track: *Public Engagement* Level: *All*

Description: Elected officials are told that the budget is the most important policy making document they have, and yet most of them have no idea what to do with the financial information they receive, much less how it relates to policy making. Henri Bergson said, "The eye only sees what the mind is prepared to comprehend." How well prepared are the minds of your elected officials to see what you want them to in terms of the finances of the city? This session will discuss how to turn all that financial data into information that your elected officials can understand and use in their role as policy and decision-makers.

Speakers: Kathie Novak, Daniels College of Business, University of Denver; Andrew Copland, Douglas County

Moderator: Sara Kurtz, Eide Bailly

Time: 9:45 – 10:00 AM

Break



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Time: 10:00 – 11:45 AM

Title: Intergovernmental Cooperation

Track: Public Engagement *Level: All*

Description: In these days of dwindling resources, partnering with other organizations is critical to meet the needs of a community. There are some terrific examples out there and no organization is too big or too small to partner with others. This session will bring four different perspectives of ways that you can partner with others. From a smaller City in rural northeastern Colorado to an agreement between multiple agencies in Jefferson County, come hear from Elected Officials, an Executive Director and a Finance Director on the value of partnering with others.

Speakers: Vicky Quinlin, City of Brush!; Shannon Bird, City of Westminster; Jeff Hansen, City of Golden; Don Moseley, Ralston House

Moderator: Tammy Hitchens, City of Westminster

Time: 10:00 – 11:45 AM

Title: Budget Approaches – Pros and Cons

Track: Budget *Level: Basic*

Description: Got Budget? This session presents real-talks from Finance managers as well as Budget officers that implemented different budget methods collected from extensive surveys and research. The results and data were collected from variety of cities, counties, parks and recreations, and school districts. We will present challenges they faced during and after the implementation, and benefits of new budget methods.

Speakers: Kristin Donald, City of Bozeman, MT; Sakura Rohleder, Apex Park and Recreation

Moderator: Sakura Rohleder, Apex Park and Recreation

Time: 10:00 – 11:45 AM

Title: Federal Program Regulatory Oversight

Track: Accounting and Grants *Level: All*

Description: Compare and contrast the types of oversight an entity who receives federal funding may receive. Participants will be able to hear firsthand what each type of oversight (programmatic reviews, single audits and OIG reviews) entails and learn tips and tricks to survive the process.

Speakers: Marcie Ardan, BKD, LLP; Aaron Gagné, U.S. Department of Housing and Urban Development; Todd Gagon, U.S. Department of Housing and Urban Development

Moderator: Lisa Horn, BKD, LLP



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Title: **Public Speaking Skills to make your Presentations Win!**

Track: *Professional Development* Level: *Basic*

Description: At some point in your career you will be asked to give a presentation. Having the confidence and ability to share your ideas in front of an audience of any size is an important professional skill. If you shudder at the thought of standing up in front of an audience, or if you'd like to improve your skills, then this session is designed for you! Attendees will learn how to prepare for a presentation, speak with confidence, avoid common pitfalls, and recover from missteps. This session will focus on practical public speaking tips for beginners and lessons to create winning presentations. From cadence to comprehension, see how to stay engaged with your audience using interactive and dynamic communication that provides information which will be remembered.

Speakers: Karen Main, Innovations In Trainings, Inc;

Moderator: Danielle C. Tuscher, City of Brighton

Time: 10:00 – 11:45 AM

Title: **Nexus Jurisdiction for Tax**

Track: *CTAC* Level: *All*

Description: This session will present a background of jurisdiction for tax purposes, or the concept commonly referred to as "Nexus". The approach is comprehensive and includes court cases on jurisdiction nationally, as well as court cases on jurisdiction and tax at the Circuit level and State level. Basic tips on case analysis will be included so the next time you want to read a court case it will be simpler to understand. Some of the information will also be useful for areas other than tax, but the focus of the session will be on tax jurisdiction. Open discussion is welcome, so come with questions and comments as well.

Speaker: Ken Martinez, City of Northglenn

Moderator: Heather Pezzella, Town of Breckenridge

Time: 10:00 – 11:45 AM

Title: **Fraud Awareness and Prevention**

Track: *Investments and Banking* Level: *All*

Description: This course will teach you how to identify the various forms of fraud threats including banking fraud, credit card fraud, identity theft and cyber attacks. You will learn steps you can take to protect both you and your organization from future attacks.

Speakers: Shannon Stanfield, UMB Bank; Jill Darling, UMB Bank

Moderator: Kathy Stafford, UMB Bank



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11:45 AM

Lunch

Time: 12:45 – 1:45 PM

Title: **Legislative Update**

Track: *General*

Level: *All*

Description: This session will provide an update on legislative and policy issues driven by state legislation impacting municipalities, as well as legislation likely to be introduced in the 2018 session. In addition, the session will provide the latest on ballot initiatives on the 2017 ballot, as well as those that have been filed and working their way through the process that may potentially end up on the 2018 ballot. Dianne Criswell with the Colorado Municipal League will give an update, from the municipal perspective, on state legislative proposals and election impacts.

Speaker: Dianne Criswell, Colorado Municipal League

Moderator: Cheryl Wallace, RubinBrown, LLP

Time: 1:45 - 2:45 PM

Title: **Economic Briefing**

Track: *General*

Level: *All*

Description: Dr. Tatiana Bailey, Director of UCCS Economic Forum in the College of Business, Assistant Professor Attendant Rank will provide an economic update on the Nation, Colorado and southern Colorado. With her extensive background in Public Health and Economic Development, her comments are sure to be relevant and informative.

Speaker: Tatiana Bailey, University of Colorado at Colorado Springs

Moderator: Deborah Tolley, J.P. Morgan



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Time: 2:45 – 3:00 PM

Break

Time: 3:00 – 4:00 PM

Title: **Succession Planning - Are you ready for the Silver Tsunami?**

Track: *Professional Development* Level: *All*

Description: A discussion on the need of having a succession plan, how to set one up if you don't have one, or determining if the one you do have is adequate.

Speaker: Lore Nusser, Apex Park & Recreation District

Moderator: Cheryl Pattelli, City of Boulder

Time: 3:00 – 4:00 PM

Title: **GFOA's Budget Award Program**

Track: *Budget* Level: *Basic*

Description: GFOA's Budget Award Program is the most prestigious award for Governmental Budgeting. Have you ever wonder what the award is about and how to get it? This is the session for you! This session will help you improve your budget from "State requirement" level to "Budget-Award Worthy" Level. The session explains the eligibility requirements for the award, its process as well as its judging criteria. Presenter is Kristin Donald who is a 2016 Budget Award Program Winner as well as qualified reviewer for the GFOA Budget Award.

Speaker: Kristin Donald, City of Bozeman, MT

Moderator: Sakura Rohleder, Apex Park and Recreation

Time: 3:00 – 4:00 PM

Title: **IRS Shifts Attention Toward Government Entities : A Playbook for Preparedness**

Track: *Accounting and Grants* Level: *Basic*

Description: In its latest Priority Guidance Plan, the IRS mapped out its strategy for policing federal, state and local governments' tax compliance, focusing on worker classification and payroll tax issues. We will discuss the work plan details and risk areas governmental entities should consider for internal review.

Speaker: Kevin Ensminger, BKD, LLP

Moderator: Marcie Ardan, BKD, LLP



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Time: 3:00 – 4:00 PM

Title: **Tax Revenue Reporting - How to Get the Most Bang for Your Buck!**

Track: *CTAC*

Level: *Basic*

Description: Many times, our tax revenue reporting methods are the only communication elected officials, citizens and other stakeholders have with the Sales Tax Department. Wrought with data to be used to create a picture of the economic health of our tax revenue divisions, they can also be incredibly time consuming. If you're interested in learning about ways to provide effective, meaningful reports that can benefit leadership as well as our own compliance and audit efforts, this session will get your wheels turning! This panel will define our goals of reporting, who our audience is and how we can make those tedious reports work for us!

Speakers: Brandy Zink, Town of Parker; Rebecca DeHerrera, City of Littleton

Moderator: Linda Quade, Town of Parker

Time: 3:00 – 4:00 PM

Title: **Case Study on Portfolio Structure**

Track: *Investments and Banking*

Level: *Advanced*

Description: This session will discuss key strategies and processes for making decisions on ways to structure a public agency investment portfolio. Through an interactive model using actual market data, case studies of portfolios with differing duration, asset allocation, optionality and credit quality will be analyzed over a given time period. The performance attribution will be reviewed and discussed on each of the different structures. Participants in the session can input variations to the case study portfolios or input a new portfolio built to examine performance attribution as portfolio structures change.

Speakers: Jeff Probst, Chandler Asset Management

Moderator: Ned Connolly, Chandler Asset Management

Time: 3:00 – 4:00 PM

Title: **Open Records Requests**

Track: *Public Engagement*

Level: *Basic*

Description: This session will discuss the open records requests process. Best practices as it relates to handling these requests. Discussion of lessons learned from various situations that will aide governments in responding to these requests.

Speakers: Dave Rose, El Paso County

Moderator: Cheryl Wallace, RubinBrown, LLP



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Time: 4:00 – 5:30 PM

Title: **CGFOA Business Meeting**

Time: 6:30 – 9:00 PM

Office Olympics Conference Banquet

Description:



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Time: 7:15 8:15 AM

Breakfast – Hot Buffet

Time: 8:15 – 10:00 AM

Title: Federal Asset Forfeiture

Track: Accounting and Grants *Level: All*

Description: Federal Forfeiture Assets are often a mystery to the Finance Department. This session will explain how these dollars may be used, what documentation must be kept and what policies should be in placed. Mesa County Sheriff's Office was audited by the Federal Government in 2011 and through this process we made many changes that we would like to share with you.

Speaker: Debbie Murray, Mesa County Sheriff's Office

Moderator: Laurie Litwin, Teller County

Time: 8:15 – 10:00 AM

Title: Tying Performance to Strategic Goals

Track: Budget *Level: Basic*

Description: Performance measurement is an important part of gauging individual and organizational success. It is sometimes difficult to connect personal and program performance with an organization's overarching strategic goals. How does one define success and appropriately tell the story of a particular program? More importantly, how can program managers be helped to show the connection between an organization's strategic goals and the progress of their own program(s)? Using real-world examples, this session will help organizational leaders and program managers lay the foundation for systems that connect customer-oriented measures with an organization's strategic plan, strategic goals, budget and major planning milestones.

Speakers: Marv Weidner, Weidner, Inc.; Mike Calderazzo, City of Boulder

Moderator: Gina Coluzzi, City of Boulder

Time: 8:15 – 10:00 AM

Title: Case Study: Sales Tax

Track: CTAC *Level: All*

Description: Jeff Hansen and Tom Merrigan will take attendees through an actual Sales Tax case study from beginning to the end with the court's outcome.

Speakers: Jeff Hansen, City of Golden; Tom Merrigan, Ber Hill Greenleaf Ruscutti

Moderator: Bob Krug, Morgan Stanley CSAFE



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Time: 8:15 – 10:00 AM

Title: **Case Study: Cash Cycle**

Track: *Investments and Banking* Level: *All*

Description: This course will address some examples of how to effectively analyze your organizations cash flow cycle. We will address best practices for taking an honest look at internal efficiencies and ways to improve cash flow performance.

Speakers: Joanna Vosburg, UMB Bank; Mike Koller, UMB Bank

Moderator: Kathy Stafford, UMB Bank

Time: 8:15 - 10:00 AM

Title: **Sustainability is Not Just a Buzzword**

Track: *Public Engagement* Level: *All*

Description: Many local governments are tasked with making their communities more sustainable; but defining what that means, and how it works can be challenging.

Sustainability is an abstract concept that gains value when made more concrete to the organization. This session will define what sustainability means for local governments and present a concise structure for how to approach it from a municipal perspective. Using the Six Forms of Community Capital approach, local governments can evaluate the relative impacts of virtually any program or project toward their sustainability goals. The session will also discuss the STAR Community rating system of sustainability standards, as well as, Colorado C-PACE which is a financing tool that allows commercial and multifamily property owners to finance qualifying energy efficiency, water conservation, and other clean energy improvements on existing and newly constructed properties, with repayment of the financing through a voluntary assessment on their property tax bill.

Speakers: Thomas Ochtera, City of Westminster; Paul Scharfenberger, Colorado Energy Office; Alex Helling, STAR Communities

Moderator: Tammy Hitchens, City of Westminster



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Time: 8:15 – 10:00 AM

Title: **Building a High Performing Team**

Track: *Professional Development* Level: *All*

Description: Teams are an important component of today's government workplace - it seems like more and more of our work is done through teamwork, with the goal of working smarter, faster or more creatively. But if you've ever been on a team where not much was accomplished (or relationships suffered), you know how frustrating that can be. Why is it some teams thrive while others fall flat?

This session will explain the simple elements associated with high-performing teams and then share some strategies and tools you can use to begin to transform your team from good - to high-performing.

Speaker: Karen Main, Innovations in Training

Moderator: Jill Johnson, Boulder County

Time: 10:00 – 10:30 AM

Break

Time: 10:30 – 11:30 AM

Title: **A History of Interest Rates and How They Influence Investment Decisions**

Track: *Investments and Banking* Level: *Basic*

Description: A review of interest rates and what events increase or decrease U.S. Treasury yields. Open discussion of how finance officers are investing public funds and recognizing risks.

Speaker: Robert Casaceli, Peaks Investment Management

Moderator: Troy Hunsucker, Peaks Investment Management



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Time: 10:30 - 11:30 AM

Title: **It all Starts with a Handshake**

Track: *Professional Development* Level: *All*

Description: From the moment you walk into a room and exchange a greeting, the person you are meeting with is judging you. In this brief moment, you can get a good understanding of the person you are interacting with. When you understand the underlying attitude of an individual, it allows you to formulate an approach in dealing with them. You can determine if an individual will try to control the interview, if they will look to you for control, or if they have no real desire to interact with you at all. It all begins with a handshake and concludes with a conversation.

In conducting investigative interviews with all types of individuals, there are no “magical” words or spells to get a person to open up to you. Every person is different. If you walk into an interview believing you can interview everyone the same way, you are mistaken. Many times it’s not what the person says that provides you with the information you’re looking for, it might be what the person isn’t saying or how they are saying it that leads you to the truth.

Speaker: Douglas Cash, Eide Bailly LLP

Moderator: Jeffrey Edwards, City of Aurora

Time: 10:30 – 11:30 AM

Title: **State Regulations of Home Rule Taxing Authorities**

Track: *CTAC* Level: *Basic*

Description: The State of Colorado Constitution provides municipalities the authority to obtain Home Rule status. Along with that opportunity comes statutory directives limiting our self-governing control of sales tax administration. This session will explore the statutes relating to local government and how they impact your day to day responsibilities as tax professionals.

Speakers: Bill Speckman, Bill Speckman Consulting

Moderator: Brandy Zink, Town of Parker



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Time: 10:30 – 11:30 AM

Title: **Budget Roundtable**

Track: *Budget*

Level: *All*

Description: This session will discuss the reasons for budget, what it does and doesn't do for an entity, how it implements policies and goals that have been set by the governing board and above all how it can be used as a communication tool for everyone. There will also be an overview of how a budget is assembled and how we go about it.

Speakers: Bob Eiche, City of Boulder; Laurie Litwin, Teller County

Moderator: Debbie Murray, Mesa County

Time: 10:30 – 11:30 AM

Title: **Transportation Revenue Generation: Past, Present and Future**

Track: *Public Engagement*

Level: *All*

Description: A critical examination of the transportation revenue generation at the state and national level, weaknesses of the existing revenue model, and potential solutions for the future.

Speaker: Tim Kirby, Colorado Department of Transportation

Moderator: Marlin McDaniel, Jefferson County

Time: 10:30 - 11:30 AM

Title: **DIY: Internal Audit**

Track: *Accounting and Grants*

Level: *All*

Description: This session will help you identify responsibilities of an internal auditor, what type of transactions, procedures and contracts should be audited, who should conduct the audit and how frequently. The presenters will also review risk assessment, internal controls and the internal audit process.

Speakers: Alan Haynes, City of Golden, Jacqueline Rowland, City of Colorado Springs;

Valerie Walling, City & County of Denver

Moderator: Stephanie Novello, City of Golden

Time: 11:30 AM – 1:30 PM

Debriefing Lunch

Description: This lunch is for conference committee members only and provides an opportunity to unwind and debrief any thoughts and comments gathered throughout the week.