

Thank you for attending the MDGFOA Spring Conference.

REMINDER

2017-18 Memberships will be available for acquisition online
beginning June 1, 2017.



Spring Conference

April 28, 2017

BWI Marriott



Agenda

- 8:00 a.m. Registration and Continental Breakfast**
- 9:00 a.m. Introduction and Welcome**
Janet Irvin, President
MDGFOA
- 9:10 a.m. Investment Strategy**
Sid Vaidya, CFA
US Wealth Chief Investment Strategist
TD Bank
- 10:00 a.m. Hot Topics in Government Accounting**
Jeff Markert, Partner
KPMG LLC
- 10:50 a.m. Break**
- 11:00 a.m. Maryland General Assembly Update**
David Juppe, Senior Operating Budget Manager
Maryland Department of Legislative Services
- Michael Sanderson, Director
MACo
- Noon Networking**
- 12:30 p.m. Luncheon**
- 1:30 p.m. The Federal Budget Debate and Its Impact on State and Local Governments**
Mike Leachman, Director of State Fiscal Research
Center on Budget and Policy Priorities
- 2:20 p.m. Break**
- 2:40 p.m. Economic Update**
Luke Tilley, Chief Economist
Wilmington Trust
- 3:30 p.m. Improving Performance with LEAN Management Techniques: The Baltimore City Experience**
Andrew Kleine, Budget Director
Baltimore City
- Kirsten Silveira, Government Innovation Analyst

6 CPE Credits

Please make sure you turn in your CPE Verification Form



Affinity Groups & Meetings

As part of the MDGFOA Membership Benefits, we provide our members with additional educational and networking opportunities through our Affinity Groups. Our Affinity Group meetings will be posted online as well as promoted to our Members via email.

Please join us!

Investment and Treasury Management

Objectives:

To explore and discuss all aspects of governmental cash management.

To explore and discuss the prudent investment of public funds.

Chair: Tim Hayden & Rob Burke

Debt and Fiscal Policy

Objectives:

To explore and discuss all aspects of governmental debt management

Chair: Steve Kraus

Tax / Revenue

Objectives:

To create a group of tax collectors and others to discuss and analyze tax sale issues and procedures.

To share views on modern technology for the collection of taxes and cash receipts.

To create a friendly working atmosphere with collectors and the State Department of Assessments and Taxation.

To gather pertinent information on legislative proposals and develop a consensus with elected officials.

Chair: Eric Jackson

Affinity Groups are for Members of MDGFOA. If you would like to attend one of our Affinity Meetings please make sure that your membership is current. All members receive Affinity Group Meeting promotions.

Thank you to our 2016-17 Partners

Platinum



Palladium



Gold

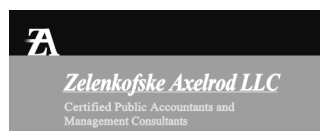


CliftonLarsonAllen

Silver



Bronze



Supporters

Kent Grove



Sid Vaidya, CFA
US Wealth Chief Investment Strategist
TD Bank

As the US Wealth Investment Strategist, Sid is tasked with delivering the firm's thought leadership, market views and investment strategies across all asset classes for client portfolios. He also works extensively with TD Wealth's Products group in developing the product vision for US investment platforms and solutions.

Sid joined TD in 1996 and has twenty years of wide-ranging experience in the North American financial services industry with proven capability in developing comprehensive investment platforms and solutions, thought leadership and channel communications, advisor training and practice management initiatives and extensive relationship management activities. Prior to taking the role as the US Wealth Investment Strategist in 2015, he was Head of Managed Investments in the Portfolio Advice & Investment Research team, where he led all investment manager due diligence and oversight functions.

Sid is a member of TD's Wealth Asset Allocation Committee. He holds a Bachelor of Commerce from the University of Toronto and has been awarded the Chartered Financial Analyst designation.



Jeff Markert, Partner
KPMG LLC

Jeff Markert, CPA, is a partner with KPMG LLP (KPMG) with more than 28 years of experience serving state and local and not-for-profit organizations. Jeff currently works in KPMG's Department of Professional Practice in New York City. In this role, he devotes significant time to emerging issues related to government organizations, including providing technical assistance and training to KPMG personnel throughout the United States. Jeff was the Chair of the AICPA State and Local Government Expert Panel for the last four years and is also the chair of their task force on pension and OPEB accounting and audit issues.

Prior to joining KPMG's Department of Professional Practice, Jeff spent 20 years in KPMG's Chicago office and was the practice leader for KPMG's Midwest public sector audit group. In this role, Jeff was responsible for not-for-profit and government services and also served as the engagement partner for many of their larger and more complex clients, including several public employee retirement systems.

2017-18 Partnerships are available now!

You may visit our website for all of our Partner Opportunities



Michael Sanderson, Director MACo

Michael Sanderson is the Executive Director for the Maryland Association of Counties, and helps guide that organization's member services and policy advocacy in Annapolis. MACo represents 24 jurisdictions on a wide range of policy issues, and provide education and training support for county elected official and professionals. He has represented county governments in Maryland on a

wide range of fiscal and policy issues for over 20 years. Mr. Sanderson is well versed not only in local government issues and legislative advocacy, but also the state's budget process and taxation system.

He has worked on issues ranging from voting systems to tax sales, from liability reform to substance abuse treatment programs, and from land preservation to tax fairness. Mr. Sanderson previously worked as professional staff to the House of Delegates' Ways and Means Committee, and received his degrees in Economics and Public Administration from Syracuse University. He sits on the Board of Directors of the Local Government Insurance Trust, and has taught at Anne Arundel County Community College's Department of Business and Economics.

Michael Sanderson taught at Anne Arundel Community College's Department of Business and Economics for 10 years, where he received high marks from student evaluations for his weekly puzzles and trivia, and for occasional economics lessons. Mr. Sanderson was on a recent runner-up team at Tuesday Pub Trivia, having lost only on an absurd tiebreaker question regarding sheep in New Zealand. Michael is a former paid staff writer for the online website BaseballHQ.com, where he focused on defense-independent pitching analytics. He was elected as Comptroller of the Student Activity Fee while at Syracuse University, and swore off any future in elected office after that experience. Michael was the Vice President of the Edison High School Spanish Club and was twice named "Student of the Month" by the Sandusky Register.

He currently lobbies for county governments in Annapolis while he awaits the final call from Ozzie Newsome for the co-General Manager job with the Baltimore Ravens.



Shhhh....a little birdie told me

YOU could be one of two **LUCKY WINNERS** of:

A Summer Conference Registration for yourself and a guest

Drawing to be held during the Luncheon



2016-17 Membership Directory

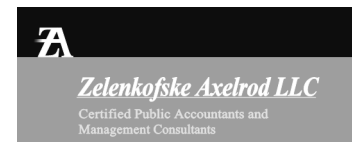
We have begun our update process in preparation to produce our 2016-17 Membership Directory.

Please make sure to reply with any corrections or changes to our Verification Email.

If you are not an Active MDGFOA Member but would like to make sure you are included in our yearly Membership Directory, please go online to www.mdgfoa.org and acquire your membership by May 15, 2017.

WWW.MDGFOA.ORG

Visit our Exhibitors





**Kirsten C. Silveira, Government
Innovation Analyst
City of Baltimore**

Kirsten C. Silveira is the Government Innovation Analyst for the City of Baltimore, MD – managing the Baltimore Idea Lab: the umbrella program for Process Improvement and the \$5.3M Innovation Fund.

Kirsten has worked with the City for three years, beginning as a Budget Management Analyst managing Baltimore's \$570M public safety portfolio and supporting the growth and sustainability of the Outcome Budgeting initiative.

In addition to this work, Kirsten leads the City's budget engagement efforts with a focus on creating opportunities for residents to share their values and priorities with City leaders. Applying her creativity to budget publications, Kirsten has also improved the way residents learn about the City's budget – earning the organization an award of Excellence in Citizen Centric Reporting in Fiscal 2016.

Kirsten received the Medallion for Meritorious Service Award from Mayor Stephanie Rawlings-Blake for her public service to Baltimore residents through commitment to ensuring the quality and efficiency of City services with innovation and process improvement.



**Dr. David Juppe
Senior Operating Budget Manager
Maryland Department of Legislative Services**

Dr. David B. Juppe has worked for the Maryland General Assembly's Department of Legislative Services for 28 years, and is a Senior Operating Budget Manager. He coordinates the analysis of the Maryland operating budget. David holds a Bachelor's Degree in Political Science from Towson State University, and Master of Public Administration and Doctor of Public Administration degrees from the University of Baltimore. Dr. Juppe also teaches as an adjunct faculty at the University of Baltimore and Penn State University.

He was President of the National Association of Legislative Fiscal Offices and received a Legislative Staff Achievement Award. He has presented papers on public budgeting at various conferences and co-authored an article in Public Budgeting and Finance. Dr. Juppe provided training on budget analysis and fiscal note preparation for the national parliamentary staff in Maputo, Mozambique, testified before a congressional subcommittee and the Canadian Parliament on Social Impact Bonds, and visited Amman, Jordan where he made recommendations for improving the Parliament's review of the national budget.

SAVE THE DATES

Fall

10/27/2017
10/26/2018
10/25/2019

Winter

1/19/2018
1/25/2019

Spring

4/27/2018
4/26/2019

Summer

June 21-23, 2017
June 20-22, 2018



**Mike Leachman
Director of State Fiscal Research
Center on Budget and Policy Priorities**

Michael Leachman is the research director for the state policy division of the Center on Budget and Policy Priorities, a nonpartisan research institute in Washington, D.C. that designs and supports public policies that help families and communities thrive.

Leachman's team at the Center has developed a state fiscal policy agenda for building stronger state economies, produced a set of recommendations for making state budgeting processes more transparent and useful to policymakers and the public, and analyzed a wide range of state policy proposals including unaffordable tax cuts, needed criminal justice reforms, and smart investments in poor children and their families. He's also the co-author of a recent paper on the harm that could come from potential cuts to federal aid for states and localities.

SUMMERTIME!

Means the MDGFOA Annual Summer Conference



Our Agenda is **loaded** with sessions that bring new light on current issues, continuing education, renowned speakers and networking opportunities!

The Clarion Resort Fontainebleau Hotel will again be our Host Hotel.
Make sure you make your reservations before rooms sell out!

Our Exhibit Hall is full! Don't forget to stop by.

REGISTRATION OPENS MONDAY AT WWW.MDGFOA.ORG



Luke Tilley
Administrative VP, Chief Economist
Wilmington Trust

As a member of Wilmington Trust's Investment Committee, Luke develops forecasts of the U.S. and international economies, as well as researches emerging issues to support and enhance the firm's investment strategy. Luke is also responsible for communicating the

economic outlook and investment strategy to clients and the public.

Prior to joining Wilmington Trust in 2015, Luke was Officer and Economic Advisor with the Federal Reserve Bank of Philadelphia. Earlier in his career, Luke worked as a senior economist at IHS Global Insight and as an economist for the U.S. Department of Housing and Urban Development.

Luke holds a master's degree and Ph.D. in Economics from Temple University, and a bachelor's degree in Economics and History from James Madison University. He is an former adjunct faculty member at Temple University and formerly served on the board of directors of the Pennsylvania Economic Association. In addition, Luke is President of the Philadelphia Council for Business Economics, a chapter of the National Association for Business Economics.



Andrew Kleine, Budget Director
Baltimore City

Andrew Kleine is a nationally recognized leader in budgeting for outcomes, long-term financial planning, Lean Government, and pension and health benefit reform.

Andrew became Baltimore's budget director in 2008, after nearly 15 years of federal government service that included budget and policy positions in the U.S. Department of Transportation, White House Office of Management and Budget, and Corporation for National and Community Service.

Andrew's implementation of Outcome Budgeting in Baltimore helped the city prioritize its spending during an unprecedented fiscal crisis. He has also taken many steps to engage citizens in the budget process, including a citizen survey, a citizens' guide to the budget, and budget workshops and online tools that allow citizens to try their hand at balancing the city budget. Andrew led the development of the city's first-ever ten-year financial plan, which has already cut a large structural budget deficit in half, shrunk unfunded liabilities by 25 percent, pumped more than \$130 million into infrastructure projects, and boosted the City's bond rating.

Andrew's Lean Government and Innovation Fund initiatives have improved customer service and business process efficiency across city agencies. By summer 2016, more than 1,000 city employees will be trained in Lean thinking.

Andrew is using Results Based Accountability to marry Outcome Budgeting and CitiStat. OutcomeStat will align strategic planning, budgeting and performance management in a whole new way and serve as a model for other large cities.

Andrew received the 2016 National Public Service Award from the American Society for Public Administration and the National Academy of Public Administration.

Andrew holds a B.A. in Political Science from Washington University in St. Louis and a Master of Public Policy from the University of Michigan.