Maryland GFOA

Thank you to our Exhibitors

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ISG INFORMATION SERVICES GROUP

YOU could be the lucky winner today of an Annual Summer Conference registration for you and a guest. Registration includes; registration for the attendee and guest which includes all MDGFOA functions and meals, plus accommodations on Wed and Thurs evening at the Clarion Fontainebleau Hotel.

Drawing to be held during the Spring Conference Luncheon

GOOD LUCK TO ALL!

Thank you for attending the MDGFOA Spring Conference

Please remember to drop your signed CPE sheet at the registration desk on your departure from the conference. We look forward to seeing you in Ocean City in June!

Maryland GFOA

Spring Conference

April 27, 2018

BWI Marriott

Agenda at a Glance

8:30 a.m.	Registration and Continental Breakfast
9:00 a.m.	**Introduction and Welcome** Lenny Moore, President, MDGFOA
9:10 a.m.	**Alternative Investments for Pension Funds** Bradley Atkins, Managing Director, Franklin Park Don Ross, Managing Director, Wainwright Investment Counsel
10:00 a.m.	**Risk Management** Jim Kreiser, CliftonLarsonAllen
10:50 a.m.	*Break*
11:10 a.m.	**Tax Legislation Update** Andy Schaufele, Director, Maryland Bureau of Revenue Estimates
Noon	*Networking*
12:30 p.m.	*Luncheon*
1:30 p.m.	**Economic Development Strategies** Lily Qi, Assistant Chief Administrative Officer, Montgomery County Office of the County Executive
2:20 p.m.	**Blockchain Technology** Mike Myburgh, Principal Consultant, TIBCO Software
3:10 p.m.	*Break*
3:30 p.m.	**Maryland General Assembly Update** Michael Sanderson, Executive Director, MACo

The MDGFOA E-Learning Courses will be available online through Radford University's Government and Nonprofit Assistance Center (GNAC).

Course dates coming soon!

The courses are self-paced, and can be accessed from any internet connection. They are broken into sections. Each section has a recorded PowerPoint slide presentation. After working through the slides for a section, you should take that section's quiz. The slides can be printed in advance for reference and making notes while taking the class. You can take the quizzes as many times as you like. After you have completed all sections of a course, you need to take the course exam in order to receive CPEs credit for the course. There is a two-hour time limit and you only have one attempt. Once you start the exam, the two hour period begins and does not stop if you leave the exam. You must make a score of 70% on the exam to receive CPE credit for the course.

Courses

Cash Management and Banking– 8 CPE's

Objective: This course will cover topics such as the US Banking System, Cash Management Services, Card Services, Fraud Prevention, Account Analysis, Rebidding Banking Services, and Managing your Banking Relationship.

Debt Management– 10 CPE's

Objective: This course will cover topics such as establishing debt policy, the determinants of municipal bond interest rates, capital financing methods, bond security, structuring and sizing a bond issue, credit quality and ratings, underwriting and selling of bonds, assessing refinancing opportunities, and continuing disclosure requirements.

Intermediate Governmental Accounting– 7 CPE's

Objective: Participants will be provided with a working knowledge of the special financial reporting issues faced by state & local governments. It is based on the new GAAFR and focuses on the fund financial statements. The class is recommended for mid-level finance officers, accountants, treasurers, auditors and other persons with a basic knowledge of accounting.

Internal Controls, Auditing and Fraud– 7 CPE's

Objective: Course will cover the five elements of internal control – control environment; risk assessment; control activities; information and communication; and monitoring. We'll also learn what to do if you suspect fraud in the workplace.

Introduction to Governmental Accounting - This course does not qualify for CPE credit

It is designed to introduce governmental accounting practices to "non-accountants". Those with previous accounting experience should consider starting with the Intermediate Governmental Accounting course instead of this introductory course.

Retirement and Benefits, Risk Management, and Procurement– 10 CPE's

Objective: This course will cover topics such as retirement and benefits, risk management, and procurement. Students will learn about pension administration, design, and investing pension fund assets. The course covers the identification and evaluation of risk, tools for managing risk, and implementation of a risk management program. Procurement, contract maintenance, and purchasing operations are also covered in the coursework.

Thank you to our 2017-18 Partners

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Alternative Investments for Pension Funds

This panel discussion will provide insight into alternative investments for local government pension funds. Representatives from various financial sectors will detail alternative investment opportunities available as well as their potential risks in order to ensure government officials are able to make sound decisions in an effort to boost and maintain the health of their respective funds.

Bradley Atkins
Co-Founder, Managing Director, CEO
Franklin Park

Brad Atkins is Co-Founder, Managing Director and Chief Executive Officer at Franklin Park, and a member of the firm's Investment Committee. At Franklin Park, Brad is actively involved with clients on portfolio planning, construction and management matters. He also is responsible for leading the analysis and evaluation of private equity investment opportunities, monitoring clients' portfolios and conducting industry research. Prior to Franklin Park, Brad worked with Hamilton Lane and Fleet Bank. He is a CFA Charterholder and a member of the CFA Institute. Brad received an M.B.A. in Accounting and a B.A. in Finance from American University.

Don Ross
Managing Director, Investment Advisor
Wainwright Investment Council

Mr. Ross has been with Wainwright and its predecessor firm since 1996, and has over 45 years of experience in the investment management and investment banking industries. He works with institutional and private clients both on a consulting basis and on a discretionary basis. Prior to Wainwright, Mr. Ross was a senior vice president and regional manager for the Investment Management and Trust Division with Fleet Financial Group. For almost 20 years before that, he was a member of the Corporate Finance Departments of First Boston Corporation and Smith Barney, where he was a managing director.

Mr. Ross holds an M.B.A. from the Wharton School at the University of Pennsylvania and a B.A. from University of North Carolina at Chapel Hill. He is a trustee emeritus and the former chairman of the Board of Trustees of the Newport Preservation Society, RI, and is Chairman of their Investment Committee. Mr. Ross also serves on the Board of Governors of the Newport, RI Hospital. He is a former board member of the International Tennis Hall of Fame, where he served on the Investment Committee, and a former trustee of Bryant University, where he was chairman of the Investment Committee. Mr. Ross holds the FINRA Series 7, 63 and 65 licenses.

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Risk Management

This session will discuss present and developing risks to the public sector and how officials can effectively minimize those risks to protect property, services, and employees.

James P. Kreiser, CISA, CRMA, CFSA

Principal, Business Risk and IT Services

CliftonLarsonAllen LLP

Jim is a Principal in the CliftonLarsonAllen LLP (CLA) Specialized Advisory Services group. He has 22 years of professional services experience in providing consulting and advisory services. Jim spent 10 years of his experience working at a Big 4 firm in their Business Risk and Technical Risk Services groups. His experience also includes internal audit roles at CitiBank, AMP, and Capital BlueCross. Jim has held roles of Chief Risk Officer, General Auditor, and others. His focus has primarily been in the governmental sector, healthcare, and financial institutions. At CLA, Jim has focused on clients particularly on consulting, IT, internal audit, and third-party reporting services.

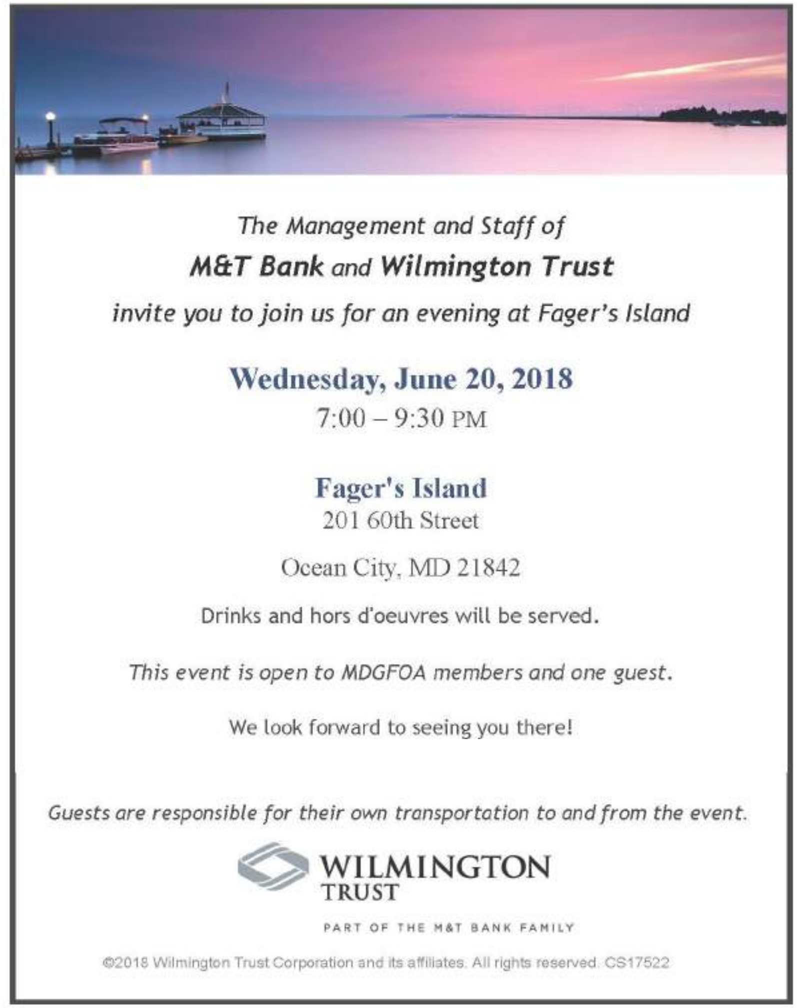
Some of the key clients Jim has focused on include the PA State System of Higher Education, Commonwealth of Pennsylvania, State of Rhode Island, Maryland Department of Budget and Management, West Virginia Higher Education Policy Commission, State of Delaware, Haverford College, California Housing Finance Agency, Washington State Department of Transportation, Maryland Transportation Authority, and many others.

Technical Expertise
Jim's experience includes managing and leading projects, which include engagements related to outsourced and co-sourced internal auditing, IT audit, third-party reviews and performance audits, enterprise risk management processes, IT security and auditing services, SSAE 16 reporting (SOC 1 and SOC2), operational improvements, process solutions and implementation for those solutions across the organization.

His primary focus for the firm is in the Public Sector Group (State and Local Government, Higher Education, and Non-Profit organizations).

His service expertise is Business Risk, IT, and Internal Audit services. Specific experience includes, but is not limited to, the following:
Internal audit outsourcing and co-sourcing, including information technology, financial, performance audits, and operational audits.
IT Security and Risk Consulting
Enterprise-wide risk assessments.
IIA Quality Assurance Reviews (QAR)
Vendor Management and Implementation Assessment
Compliance related activities and benchmarking
Presentations and Training; including speaking at various conferences/professional organizations on IT controls, Security, ERM, and third-party reporting, and risk management.

Education/Professional Involvement
Bachelor of Science, Carnegie Mellon University – Pittsburgh, PA
BS of Managerial Economics
BS of Philosophy
Certified Information Systems Auditor
Certified in Risk Management Assurance
Certified Financial Services Auditor



Q: We have an individual who regularly registers our Organizations staff for conferences as well as membership renewal and is not a member of MDGFOA. How do we continue to do that utilizing your new system?

A: Great Question!

If they are NOT a member of MDGFOA Just contact mdgfoa@mdgfoa.org. We will set you up with an Administrator account. This will allow them to register your staff all at once as well as having the information duplicated to each members membership account. **It's That Easy!**

Maryland General Assembly Update

This session will provide a recap of the 2018 legislative session of the General Assembly of Maryland and how it will impact government finance officers.

Michael Sanderson
Executive 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.

Q: My membership information never seems to be accurate, how can I make sure it is?

A: You just ***Login to your membership*** and go to **UPDATE MY PROFILE**. You can change or add anything you wish to your profile, including your photo, cell phone, home address, birthdate...

MDGFOA Annual Summer Conference

June 20-22, 2018
Ocean City, Maryland

- Excel Hot Topics and Best Practices for CPA's
- Privacy & Security Considerations– Microsoft Office Files, PDF's, Cyber-Security Tips for CPA's
- Morning Session with Keith Novak, Partner, CliftonLarsonAllen
- The Many Faces of Fraud: Why Good People Make Dumb Choices
- Chris Morrill, Executive Director, Government Finance Officer Associate of the US and Canada
- David Brinkley, Maryland Secretary of the Department of Budget and Management
- Medical Marijuana
- Fraud

DAVID R. BRINKLEY, ***Secretary of Budget & Management***

CHRIS MORRILL, ***Executive Director, Government Finance Officer Associate of the US and Canada***

Tax Legislation Update

This session will examine legislative changes to the federal tax code, corresponding modifications made by the Maryland General Assembly to the State tax code, and its ultimate impact to local governments.

Andy Schaufele
Director
Maryland Bureau of Revenue Estimates

Mr. Schaufele is the Director of the Bureau of Revenue Estimates. He previously served as the Assistant Director. Before joining the Comptroller's Office, Andy spent seven years in various private sector management positions, working in both consumer and commercial oriented product lines. Andy holds a bachelor's degree from Towson University, where he studied management and economics, and a Master's degree in Business Administration from the joint University of Baltimore and Towson University program.

Economic Development Strategies

This session will provide local government officials an insight into innovative economic development strategies to develop, redevelop, and strengthen business and residential communities. Officials will gain an understanding of how to allocate limited resources to effectively support existing business, promote entrepreneurship, and recruit new businesses.

Lily Qi
Assistant Chief Administrative Officer
Montgomery County Office of the County Executive

Lily Qi is Assistant Chief Administrative Officer for economic and workforce development responsible for the County's overall economic strategies, business climate issues, economic communication and strategic partnerships with key organizations and institutions. She has served County Executive Ike Leggett for eight years in various capacities and led strategic initiatives including privatizing economic development functions; establishing BioHealth Innovation, Inc. to advance research commercialization; developing global partnerships; improving nighttime economy, and developing the Comprehensive Economic Strategy. Lily joined Montgomery County after serving as Vice President of Business Development and Marketing for the Washington, DC Economic Partnership and spokesperson for the DC Department of Insurance, Securities and Banking.

A native of Shanghai, China, Lily is also a writer, speaker and trainer on cultural competency and immigrant integration issues. She was featured in the Washington Business Journal, Bethesda Magazine, China Daily, and Asian Fortune for her professional accomplishments and community leadership, which includes encouraging civic and political engagement of immigrant communities and serving as trustee of the Suburban Hospital of Johns Hopkins Medicine, and immediate past chair of the Maryland Governor's Commission on Asian American Affairs.

Blockchain Technology

This session will explore the word of blockchain technology and associated cryptocurrencies. Specific attention will be given to potential benefits and risks for local jurisdictions and municipalities.

Mike Myburgh
Principal Consultant
TIBCO Software

Mike Myburgh is principal consultant at TIBCO Software, responsible for evangelizing TIBCO Business Process Management software including TIBCO ActiveMatrix® BPM, TIBCO Cloud™ Live Apps, and TIBCO Nimbus®, as well as all products that integrate and visualize data. He is also responsible for evangelizing the TIBCO blockchain solution, which includes building proof of concept solutions that include Hyperledger Fabric and integration with TIBCO applications, as well as customer and community education on blockchain's potential and TIBCO's expertise. Mike came to TIBCO 18 years ago, in 2005, as part of the Staffware Workflow acquisition. Initially he was a professional services consultant implementing Staffware process solutions, then in 2007, moved to the Pre-sales national team, and to the United States from his native South Africa. In 2013, he joined the Strategic Solutions group to assist in regional BPM sales activities. Prior to TIBCO he worked for companies providing BPM solutions. Mike holds a business degree in Information Systems from the University of Johannesburg.