



SAVE THE DATES

MDGFOA Upcoming Quarterly Conferences

January 24, 2020

April 24, 2020

October 30, 2020

Annual Summer Conference In Ocean City

June 17-19, 2020

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Fall Conference

October 25, 2019

BWI Marriott

AGENDA

8:30 am Continental Breakfast / Registration

9:00 am - 9:10 am

Welcome and Introductions

Robert (Robbie) Sandlass, President, MDGFOA

9:10 am - 10:00 am

Economic Update

Anirban Basu, Chairman & CEO, Sage Policy Group, Inc.

10:00 am - 10:50 am

Cybersecurity and Ransomware

Adam Lippe, State's Attorney's Office, Baltimore County
Matthew A.S. Esworthy, Partner, Bowie & Jensen LLC
Richard Forno, Assistant Director, UMBC Center for Cybersecurity
Director, Cybersecurity Graduate Program

10:50 am - 11:10am

Break

11:10 am - 12:00 noon

Muni Market and Tax Reform

Joe Paucke, Senior Vice President, Davenport & Company, LLC

12:00 noon - 1:30 pm

Networking Session & Luncheon

1:30 pm - 2:20 pm

Maryland Revenue Update

Andrew M. Schaufele, Director
Bureau of Revenue Estimates, Maryland Comptroller's Office

2:20 pm - 2:40 pm

Break

2:40 pm - 3:30 pm

Infrastructure

David Dise, CPPO, Director, Department of General Services
Montgomery County, MD

3:30 pm - 4:30 pm

Uniform Guidance Update

Monique Booker, Partner
Not-for-profit Audit Practice Leaders, SB & Company, LLC

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**Andrew (Andy) M. Schaufele, Director
Bureau of Revenue Estimates
Maryland Comptroller's Office**

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.



**David Dise, CPPO, Director
Department of General Services, Montgomery
County**

David Dise has worked in the public sector for over 40 years. He currently serves as director of the Department of General Services for Montgomery County, Maryland, directing capital facility planning, design and construction, facilities maintenance, fleet management, real estate acquisition and disposition, planning and development, sustainability and energy management, and ADA accessibility for all county departments.

He has successfully developed and directed a wide range of intergovernmental operations, created and lead departments in engineering and procurement disciplines and is experienced in achieving success by overcoming institutional obstacles, managing change, and motivating professionals. David has been active in the American Public Works Association (APWA), the Urban Land Institute (ULI), the National Institute of Governmental Purchasing (NIGP), the Virginia Association of Governmental Purchasing (VAGP), the Institute for Supply-chain Management (ISM), and the National Electronic Commerce Coordinating Council (NECCC), chairing committees or serving on the board of directors for many of these organizations. In addition, he has chaired various committees for the Metropolitan Washington Council of Governments. David has published and contributed to research papers in public policy, and developed and conducted seminars on management, professional development, and public-private partnerships.



**Monique Booker, Partner
Not-for-profit Audit Practice Leader
SB & Company, LLC**

Monique is a partner at SBC and has over 25 years of experience in public accounting. Monique is a former senior manager with Arthur Andersen, LLP's Mid-Atlantic Government Practice. Monique graduated from Hampton University with a B.S. in accounting and is a certified public accountant in Maryland and other states. Monique has performed audits for many governments and not-for-profit clients, primarily focused on Single Audit and compliance testing, across the United States. Monique is a frequent speaker and is a trainer for the Maryland Association of Nonprofit Organizations. Monique is a member of AICPA's Audit Standards Board. She is a member of and attends many AICPA, MACPA and National Grants Management Association (NGMA) events.



**Anirban Basu, Chairman & CEO
Sage Policy Group, Inc.**

Anirban Basu is Chairman & CEO of Sage Policy Group, Inc., an economic and policy consulting firm headquartered in Baltimore, Maryland with offices in Pennsylvania and Cambodia. The firm provides strategic analytical services to energy suppliers, law firms, medical systems, government agencies, and real estate developers among others.

In 2014, Maryland Governor Larry Hogan appointed him Chair of the Maryland Economic Development Commission. He also serves as chairman of the Baltimore County Economic Advisory Committee. He is also the Chief Economist to Associated Builders and Contractors and Chief Economic Advisor to the Construction Financial Management Association. He serves similar functions for Visit Baltimore, the Maryland Association of Realtors, and Marcum, LLC.

He lectures at Johns Hopkins University in Global Strategy and has also taught international economics, urban economics, micro- and macroeconomics at Hopkins. His radio show can be heard weekdays on 88.1FM, WYPR, Baltimore. In both 2007 and 2016, the Daily Record newspaper selected Mr. Basu as one of Maryland's 50 most influential people. The Baltimore Business Journal named him one of the region's 20 most powerful business leaders in 2010.

Mr. Basu has been on many boards over time, including First Mariner Bank, the Baltimore City Public School System, Port Discovery, the Baltimore School for the Arts, and Union Memorial Hospital. He is currently on the boards of St. Mary's College, the University System of Maryland Foundation, the Center for Emerging Media, the Lyric Opera House and the Archdiocese of Baltimore School System. Mr. Basu earned his B.S. in Foreign Service at Georgetown University in 1990. He earned his Master's in Public Policy from Harvard University's John F. Kennedy School of Government, and his Master's in Economics from the University of Maryland, College Park. His Juris Doctor was earned at the University Of Maryland School of Law.



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(GNAC)**

- Cash Management and Banking
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- Internal Controls, Auditing and Fraud
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- Retirement and Benefits, Risk Management, and Procurement

mdgfoa.org/resources-2/e-learning-courses/



**Adam Lippe, Chief
Economic | Cyber | Animal Abuse Units,
Baltimore County State's Attorney's Office**

Mr. Lippe is a career prosecutor who serves as the Chief of the Economic | Cyber Crimes Unit for the Baltimore County State's Attorney's Office (a jurisdiction of over 800,000 people). In this role, he manages direct reports and personally works on complex embezzlements and frauds, including

identity theft, internet scams, check and credit card frauds, large material thefts, organized retail crime, financial exploitation of vulnerable adults, entitlement fraud, animal cruelty, in addition to handling murders. He was a district and juvenile court prosecutor, before heading to violent crime and narcotics for many years before his current position.

Mr. Lippe has been an adjunct faculty member at both the University of Maryland School of Law and University of Baltimore School of Law and well as several other local colleges and universities helping to teach undergraduate and graduates both on -campus and on-line. He also was a frequent lecturer at the National Advocacy Center in Columbia, South Carolina for the National District Attorney's Association. Licensed in both the state of Maryland and New Jersey, Mr. Lippe is an alumnus of the University of Maryland School of Law and The Johns Hopkins University in Baltimore, Maryland.



**Matthew A.S. Esworthy, Partner
Bowie & Jensen LLC**

A seasoned litigator, Matt has advocated on behalf of business owners, in-house legal teams, and individuals in state and federal court. Trusted for his leadership ability in addition to his legal acumen, Matt serves as President of

Penn State Law's alumni association. A spirited member of the Penn State community, he was also appointed to the Alumni Council of Penn State University's Alumni Association. In addition, Matt holds numerous leadership roles with the American Bar Association related to cybersecurity, and is a frequent writer and speaker on the topic. Dedicated to the Greater Baltimore community, Matt has also served for over ten years as a board member of Civic Works and the Clarence H. "Du" Burns Memorial Fund. For almost two decades, businesses and individuals in the region have relied on Matt for representation in a variety of matters at the trial and appeals court levels. This work includes contract, trade secret, real estate and partnership disputes, as well as counsel and representation in cybersecurity matters. In addition, Matt represents trustees, personal representatives, and fiduciaries in trust and estate litigation in Maryland state courts.

Matt also has considerable experience representing business owners and individuals accused of white collar crimes. This includes defense against allegations of mail and wire fraud, bank fraud, antitrust, election fraud, and cybercrimes. Respected for his knowledge in this area, he holds several appointed positions with the American Bar Association's Criminal Justice section.

Since 2016, Matt has been selected to the annual list of Top 100 Maryland Super Lawyers and to the annual list of Best Lawyers in America in the field of Commercial Litigation. Prior to entering private practice, Matt served the Maryland Court of Special Appeals as staff attorney and as judicial clerk to Hon. Joseph F. Murphy, Jr.

**Richard Forno
Assistant Director, UMBC Center for Cybersecurity
Director, Cybersecurity Graduate Program**

Dr. Richard Forno is a Senior Lecturer in the UMBC Department of Computer Science and Electrical Engineering, where he directs the UMBC Graduate Cybersecurity Program and serves as the Assistant Director of UMBC's Center for Cybersecurity. His twenty-year career in operational cybersecurity spans the government, military, and private sector, including helping to build the first formal cybersecurity program for the U.S. House of Representatives, serving as the first Chief Security Officer for Network Solutions (then, the global center of the internet DNS system), advising Fortune 500 companies on critical infrastructure protection, and co-founding the CyberMaryland conference. Dr. Forno has a strong interest in the influence of technology upon national security, individuals, and global society.

In addition to teaching cybersecurity at UMBC, Dr. Forno has lectured on information security, cyber warfare, and infrastructure protection at the American University and the National Defense University in Washington D.C. He is an affiliate of the Stanford Law School's Center for Internet and Society (CIS) and from 2005-12 was a Visiting Scientist at the Software Engineering Institute at Carnegie Mellon University, serving as an instructor for the CERT Coordination Center.

His interdisciplinary research and professional interests include information age conflict, cybersecurity operations, risk communication, and the social shaping of technology — specifically, unconventional interdisciplinary and multilevel contexts related to cybersecurity, resilience, and national security for networked individuals, organizations, and societies. In addition to many articles and commentaries over the years (current selection of professional pieces), he is the co-author of O'Reilly's *Incident Response* (2001). Forno holds a Ph.D. in Internet Studies from Curtin University of Technology in Australia.



**Joseph W. Paucke, SVP
Fixed Income Department
Davenport & Company LLC**

Joseph Paucke is a Senior Vice President in the Fixed Income Department at Davenport & Company LLC. He joined Davenport in 1998 and works at the firm's Richmond, Virginia headquarters. Mr. Paucke is a member of Davenport's Board of

Directors and is the Chairman of the Audit Committee.

Mr. Paucke's fixed income career spans over 35 years, having started his career at Kidder, Peabody in 1983. His responsibilities include secondary tax-exempt bond trading as well as performing underwriting duties, both in the negotiated market and competitive market. Mr. Paucke graduated from the Georgia Institute of Technology in 1980 with a Bachelor of Science in Industrial Management degree and was conferred a Master of Business Administration degree from Georgia State University in 1986.