

Maryland

GFOA



**FALL
QUARTERLY
CONFERENCE**

**October 29, 2021
BWI Marriott**

**Conference
Program**

AGENDA

- 9:00 am – 9:10 am ● **Introduction and Welcome**
Speaker: Eric Jackson, President, Maryland GFOA
- 9:10 am – 10:00 am ● **Economic Update – Anirban Basu and the Chamber of Data**
Speaker: Anirban Basu, Chairman & CEO, Sage Policy Group, Inc.
- 10:00 am – 10:50 am ● **Improving Outcomes for Your 457(b) Deferred Compensation Plan**
Speaker: Mike Beczkoski, Senior Consultant, Director of Marketing, Bolton Partners
- 10:50 am – 11:10 am ● **Break**
- 11:10 am – 12:00 pm ● **Maryland Revenue Update**
Speaker: Andrew M. Schaufele, Bureau of Revenue Estimates
- 12:00 pm – 12:30 pm ● **Networking Reception**
- 12:30 pm – 1:30 pm ● **Lunch**
- 1:30 pm – 3:10 pm ● **Maximizing Benefits of ARPA Funds**
Speaker: Skip Stitt, Principal, Faegre Drinker | Nick Weber, Director, Faegre Drinker | Robbie Sandlass, Treasurer, Harford County Government | Ted Zaleski, Director, Management and Budget, Carroll County Government | Holly Sun, Budget Director, Howard County Government
- 3:10 pm – 3:30 pm ● **Break**
- 3:30 pm – 4:30 pm ● **Cyber Security, Risk, and a Summary of Cyber Insurance**
Speaker: Scott Soderstrom, Director of Underwriting, Local Government Insurance Trust

Thank You To Our 2021-2022 Annual Partners

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MD GFOA In-Person Conference Safety Protocol (as of 9/29/2021)

While the Maryland Government Finance Officers Association is taking measures to create a safe educational environment to allow you to voluntarily participate in our in-person conference, our protocols require participants to adhere to all recommendations and requirements implemented by state and local governments.

To reduce the spread of COVID-19, the CDC and Maryland Department of Health recommend the use of face coverings for unvaccinated people in indoor public settings to the extent possible, continued social distancing, and avoiding large gatherings if you are unvaccinated or have been exposed to COVID-19.

If you are fully vaccinated, to maximize protection from the Delta variant and prevent possibly spreading it to others, wear a mask indoors in public if you are in an area of substantial or high transmission.

Maryland has many high transmission areas; at our events we recommend participants:

- MDGFOA strongly recommends that attendees wear masks indoors (regardless of vaccination status) in accordance with current CDC

guidelines to maximize protection from the Delta variant and prevent possibly spreading it to others. At this time, local guidelines do not require the wearing of masks indoors, but MDGFOA complies with all public health entities in recognizing that mask-wearing is effective in reducing exposure and risk. We strongly recommend and encourage mask-wearing indoors while not actively eating or drinking.

- Only registered participants (attendees, exhibitors, speakers/moderators) and venue staff will be allowed in education rooms or networking areas.

Social distancing in all areas of the venue is encouraged and recommended – room and space layouts will be optimized to facilitate distancing.

- Diligent hand hygiene is strongly recommended – hand sanitizer stations will be placed throughout the venue and MDGFOA ask that participants avoid handshakes and any physical touch.

- Our existing refund policy will remain in place, allowing attendees to credit registration fees towards a future event or have a colleague attend in their place. No fees will be refunded back to participants.

SPEAKERS

David Farkas



David Farkas is the Deputy Director of the Bureau of Revenue Estimates (BRE) with the Comptroller of the State of Maryland. Previously, he served as a Revenue Analyst for the BRE, as well as holding positions with Howard County Government, Morgan State University and the private sector. David holds a Bachelor of Arts in Economics from St. Mary's College of Maryland and a Master's in Economic Policy Analysis from the University of Maryland Baltimore County.

Anirban Basu, MPP, MA, JD, Ph.D.



Anirban Basu is Chairman & CEO of Sage Policy Group, Inc., an economic and policy consulting firm headquartered in Baltimore, Maryland with an office in Indonesia. 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 (2014-2021). 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 or has served similar functions for Visit Baltimore, Maryland Realtors, and Marcum, LLP.

He has lectured at Johns Hopkins University, most recently 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 the University of Maryland School of Law, 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. His doctoral work was completed at UMBC with a concentration in health economics.

CPE Credits

Make sure to sign in at the registration desk to receive more details about obtaining your **6 CPE credits** for attending the full 2021 Fall Conference.

Maryland Approved Education Providers - Public Accountancy:

Licensees may obtain continuing education from a program or sponsor that is not a NASBA CPE Registry sponsor. The documentation for the completion of these courses is more detailed and must be evaluated by the Board, at the time of audit, to determine if they qualify.

Holly Sun



Holly Sun has been serving as Budget Director of Howard County since January 2015, overseeing budgeting and performance management and chairing the County's Spending Affordability Advisory Committee. Dr. Sun has two decades of experience managing revenues, operating and CIP budgets, and performance management systems for local governments. She joined the County from Prince Georges County where she served as Deputy Director of the Office of Management and Budget. She was previously Budget Manager of the Maryland National Capital Park and Planning Commission. Dr. Sun has been a member of the Revenue Estimating Advisory Committee of Office of the Chief Financial Officer of District of Columbia since 2001. She previously served at standing committees of Government Finance Officers Association (GFOA) and the Board of Directors of Maryland GFOA. Dr. Sun has a Ph.D. in Public Policy and Public Administration from George Washington University, and a Master of Public Policy degree from Duke University.

Michael P. Beczkowski



Michael P. Beczkowski is a Senior Consultant at Bolton Investment and specializes in plan design consulting, fiduciary best practices, fee benchmarking, TPA searches, and CEFEX certifications. His experience has focused on Defined Contribution plans: 401(k), 403(b), and 457 programs.

Mike and has been a consultant with Bolton for more than 25 years and has over 30 years of experience working with public, private, and non-profit defined contribution plans. Prior to Bolton, Mike worked for T. Rowe Price as a statistician and client service representative.

Mike graduated cum laude from Loyola University Maryland with a B.A. degree in economics and an M.S. in Finance. He is a member of Beta Gamma Sigma, the international business honor society. He is Series 65 registered, and he holds the Accredited Behavioral Finance Professional ((ABFP), Accredited Investment Fiduciary (AIF), Accredited Investment Fiduciary Analyst (AIFA), Certified Health Savings Analyst (CHSA) Certified Plan Fiduciary Advisor (CPFA), Chartered Retirement Plan Specialist (CRPS) and the Professional Plan Consultant (PPC) designations. Mike also serves as an analyst for the Center for Fiduciary Excellence (CEFEX). Mike is also a Board Advisor for the Academy of Finance at Howard County Public Schools Academy.

Robert F. Sandlass, Jr.



Robert F. Sandlass, Jr., Treasurer, was appointed to his current position with Harford County in 2014. His prior experience includes being the budget bureau chief and the supervisor of fiscal and policy analysis for the local governments of Carroll and Baltimore Counties, respectively. He holds a bachelor's degree in economics from Hampden-Sydney College and a master's degree in public administration from the University of Baltimore. Robert is the past-president for the Maryland Government Finance Officers Association, and he also serves on the Budget and Finance Committee of the Maryland Association of Counties and the State of Maryland's Next-Gen 911 Commission.

Commission.

Scott Soderstrom



Scott Soderstrom is Director of Underwriting at LGIT with 35 years in the insurance industry and 26 years with LGIT serving Maryland Local Governments. Graduated from George Mason University in 1986 with a B.S. in Business Administration and holds various insurance and risk management designations (CPCU, ARM, ARME, ARMP).

Skip Stitt



Charles "Skip" Stitt helps public sector clients drive innovation, reduce costs and improve service delivery. Skip has worked on projects in a variety of areas, including government operations, public utilities and education. Skip helps clients to identify, prioritize and implement projects that resolve financial and operational challenges. He finds solutions to operational challenges in many forms, including business process reengineering, public-private partnerships (P3) and labor-management reforms.

Ted has worked for Carroll county for more than twenty-seven years and been the Director of Management and Budget for twenty.

Ted Zaleski



Ted is the President of the Maryland Association of Counties (MACo) Budget and Finance Affiliate, is the Vice-Chair of the Local Government Insurance Trust (LGIT), served on the MDGFOA Board of Directors, including a term as President, is an adjunct instructor in two graduate programs at McDaniel College, and helped to start a graduate public administration program at McDaniel. Ted has spoken at the Government Finance Officers Association (GFOA), MACo, MDGFOA, the Maryland Municipal League (MML), to other groups, and at many community meetings.

Nick J.J. Weber



Nick Weber helps clients overcome communication barriers. Whether he is helping local governments speak the language of business to advance economic development or helping private organizations understand the policies and motivations of local officials, Nick "translates" foreign concepts to help clients advance their organization's objectives. Nick's work in this area is informed by both his experience as a government leader and more than 20 years in public relations, during which he has handled local, regional and national crisis communications issues.

Visit Our Exhibitors!



SAVE THE DATES!

**Intermediate Governmental
Accounting Seminar**

November 15-17, 2021 - Virtual Event

Winter

January 28, 2022 - BWI Marriott

Spring

April 29, 2022 - BWI Marriott

Annual Summer

*June 14-16, 2022 - Clarion Resort,
Ocean City, MD*

Memberships

The MDGFOA Membership year begins July 1 and ends June 30. Notice of membership renewal will be sent to all members to assure no lapse in their membership.

Membership Levels

**Active
\$40**

Active membership may be held by any employee of a governmental entity who is employed in government financial management

**Associate
\$50**

Associate membership may be held by any other person not eligible for active membership, but who is interested in promoting the practice of government financial management, and furthering the purpose and objectives of the Association.

**Retired
\$15**

Retired membership may be held by a former active or associate member who desires to maintain a relationship with the Association upon retirement.

**Student
Free**

Student membership may be held by a full-time college or university student enrolled in a field of study related to financial management. Verification of enrollment required.

