

Maryland
GFOA
**SPRING
QUARTERLY
CONFERENCE**

**April 29, 2022
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

*Charlie Dougherty, Vice President, Economist,
Wells Fargo Corporate and Investment Bank*

10:00 am – 10:50 am

Local Government Budget Outlook

Speakers: Jacob Dyer, Chief of Budget, Charles
County Government

*Stanley Early, Director, Management and
Budget, Prince George's County Government*
Kevin Greenville, Treasurer, Town of LaPlata

Moderator: Ted Zaleski, Director of
Management and Budget, Carroll County
Government

10:50 am – 11:10 am

Break

11:10 am – 12:00 pm

Allocations to Concentrated Strategies

Speaker: Dan Veru, Chief Investment Officer,
Palisade Capital Management, LLC

12:00 pm – 12:30 pm

Networking Reception

12:30 pm – 1:30 pm

Lunch

1:30 pm – 2:20 pm

Maryland General Assembly Update

Speakers: Kevin Kinnally, Legislative Director,
Maryland Association of Counties

*Rebecca Ruff, Department of Legislative
Services of Policy Analysis*

2:20 pm – 2:40 pm

Break

2:40 pm – 3:30 pm

ARPA Compliance Update

Speakers: Monique Booker, Partner, SB &
Company, LLC

*Tobi Hollander, Senior Manager, SB &
Company, LLC*

3:30 pm – 4:30 pm

Investing Considerations During Uncertain Times

Speakers: Brian Sanker, Managing Director,
PFM Asset Management

*Donald Grant, Senior Managing Consultant,
PFM Asset Management*

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MDGFOA Statement on Safety Protocols for 2022 Spring Conference

(as of 02/17/2022)

Maryland GFOA is committed to the health and safety of our community, members, and staff, as well as following the direction and guidelines of our state and federal intuitions. Great care is being taken as we prepare for the 2022 Winter Conference to provide a safe, professional education environment for our attendees and sponsors.

We are monitoring all guidance related to COVID-19 and are taking precautionary measures to keep our attendees safe. We will work with the venue to increase sanitation and social distancing, in accordance with local requirements and CDC coronavirus recommendations.

Baltimore County Executive Johnny Olszewski declared a local State of Emergency on December 27, 2021, requiring face coverings are required when indoors via this Health Order. Similarly, on January 7, 2022, Anne Arundel County issued an Order for Public Safety which mandates all persons over the age of two shall wear a face-covering in indoor public spaces and outdoor public spaces where physical distancing is not feasible. Though these mandates are no longer in place, MDGFOA strongly recommends wearing a mask while indoors.

MD GFOA In-Person Conference Safety Protocol

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 (as described above).

To reduce the spread of COVID-19, the Maryland Department of Health recommends the use of face coverings all persons over the age of two shall wear a face-covering in indoor public spaces, and in outdoor public spaces where physical distancing is not feasible.

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.

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 2022 Spring 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.

SPEAKERS

Charlie Dougherty



Charlie Dougherty is a vice president and economist with Wells Fargo's Corporate and Investment Bank. Based in Charlotte, N.C., he covers the U.S. economy with a focus on commercial real estate, housing, construction and regional sectors of the economy. He regularly writes indicator reports, produces special commentary, and contributes to the company's Weekly Economic & Financial Commentary. His commentary on the U.S. economy has been featured in various regional and national

media publications, including Bloomberg News, Yahoo Finance and The Washington Post.

Before joining Wells Fargo in 2017, Charlie worked as a regional economist and consultant for IHS Markit and more recently for CertainTeed, one of the largest building product manufacturers in North America.

Charlie holds a B.A. and B.S. in economics and finance from the University of Pittsburgh and a M.A. in economics from Temple University in Philadelphia.

He is a member of the National Association of Business Economics, Philadelphia Council of Business Economics and Charlotte Economics Club.

Brian Sanker



Brian is a managing director with PFM Asset Management. He provides investment advice to school districts, local governments, authorities, and other institutional investors primarily in Maryland, Pennsylvania, and other areas of the Northeast. Brian specializes in developing strategies to optimize investable balances.

Donald Grant



Donald is a senior managing consultant with PFM Asset Management. He is responsible for supporting institutional client relationships and business development efforts for the firm's multi-asset class management practice, concentrating on pension, OPEB, endowment and foundation, and long-term investment assets.

Rebecca Ruff



Rebecca Ruff has spent her entire career working for the Maryland General Assembly in the Department of Legislative Services' Office of Policy Analysis, having most recently assumed the role of Operating Budget Manager in 2019. Her policy background focuses largely on criminal justice and fiscal administration. Rebecca holds a Bachelor of Arts in Political Science from Rutgers University and a Master of Public Policy from the Bloustein School of Planning and Public Policy also at Rutgers University.

Kevin Kinnally



Kevin Kinnally leads MACo policy staff in review of legislation and coordinates advocacy to advance county positions. Contributes to MACo publications and co-hosts MACo's Conduit Street Podcast. Legislative Affairs Areas: state budget and fiscal issues, elections, finance, taxes and revenues, and emergency services. Liaison to MACo's Budget & Finance, and Emergency Management Affiliates, along with Elections Officials, Tax Collectors Affinity group (within MDGFOA), and MACo's County

Legislative Staffers group.

Tobi Hollander



Tobi is a senior manager with more than eight years of experience at SBC. Tobi graduated from University of Baltimore with a B.S. in accounting and is a certified public accountant in Maryland. Tobi has successfully worked in a variety of industries, focusing on leading engagement teams in compliance testing, substantive testing, and internal controls testing. Tobi has served many Maryland governments, including the State of Maryland and various counties and municipalities. Tobi is a member of

the GFOA, MDGFOA, AICPA, and MACPA and attends many of their events.

Monique Booker



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 past member of AICPA's Audit Standards Board. She is a member of and attends many AICPA, MACPA and National Grants Management Association (NGMA) events.

Stanley A. Earley



Mr. Earley began his career in government with the City of Dayton, Ohio as a Management Analyst in the Office of Management and Budget. His extensive professional career spans more than 40 years, with experience both in the public and private sectors. In the early part of his career he worked in the private sector with the United Way.

Mr. Earley previously worked for Prince George's County in the Office of Management and Budget from 1996 to 2003, rising to the Director position, then Deputy Chief Administrative Office for Budget, Finance, and Administration for Prince George's County. Mr. Earley later returned to Dayton, Ohio to become the Assistant City Manager, eventually becoming Deputy City Manager. In early 2016, Mr. Earley became the Chief Budget Officer for Howard University. In 2017, Mr. Earley returned to Prince George's to again serve as Director of the Office of Management and Budget.

Mr. Earley holds a B.A. in Urban Studies from Haverford College and a Master of Arts in Urban Affairs and Policy Analysis from The New School for Social Research. He is also a Certified Economic Development Professional.

He has been a member of various boards and committees, including the National Board of the Government Finance Officers Association (GFOA), and the United States Air & Trade Show.

In 2012, Mr. Earley was named "Chief Financial Officer of the Year" among public organizations and companies in the Dayton region by the Dayton Business Journal.

Kevin Greenville



Kevin Greenville is the Treasurer for the Town of La Plata, Maryland, a beautiful small town of 10,159 residents, which serves as the county seat of Charles County. Mr. Greenville is responsible for managing the Finance Department and the Town's fiscal resources. He previously worked as the Director of Finance for the City of Mount Rainier, Maryland, and in several accounting positions for a \$1billion revenue health insurance company in the federal employee benefits health insurance program. Mr.

Greenville is a Certified Public Accountant (CPA) and has a Master's of Science, Accountancy from the University of Maryland, and a Bachelor's of Science in Financial Economics from the University of Maryland Baltimore County. He sits on the Board of Directors for the Maryland Government Finance Officers Association and the Government Finance Officers Association Standing Committee on Governmental Budgeting and Fiscal Policy.

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.

Jacob Dyer



Jacob Dyer is the Chief of Budget for Charles County Government. He has been employed by Charles County for nearly twenty years and was promoted to his current role in 2018. He holds a bachelor's degree from Frostburg State University, where he studied finance and economics, and a master's degree in financial management from University of Maryland Global Campus.

Visit Our Exhibitor!



SAVE THE DATES!

Government Finance Officers Association 116th Annual Conference

June 5-8, 2022 - Austin Convention Center, Austin, TX

Annual Summer

June 14-16, 2022 - Fontainebleau Resort, Ocean City, MD

Memberships

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

Membership Levels

Active Active membership may be held by any employee of a
\$40 governmental entity who is employed in government
financial management

Associate Associate membership may be held by any other person
\$50 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 Retired membership may be held by a former active or
\$15 associate member who desires to maintain a relationship
with the Association upon retirement.

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

Maryland Government Finance Officers Association

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