

Accounting for Capital Assets - GFOA In-Person Training.

May 15, 2024

**GFOA Training Center
203 N LaSalle St, Suite 2700
Chicago, Illinois**

Details:

Virtually all state and local governments use capital assets, some of which are essentially unique to the public sector. Properly accounting for these different assets can pose a real ongoing challenge for accounting and auditing professionals. The training will furnish participants with the basic information needed to properly account for capital assets and report them in financial statements prepared in conformity with generally accepted accounting principles (GAAP).

Learning Objectives:

- Those completing this seminar should be able to:
- Identify the major capital asset classes and the specific types of capital assets properly included in each
- Determine the value at which capital assets should be reported and the proper depreciation or amortization for each
- Identify and calculate impairments
- Prepare financial statements that conform to the display and disclosure requirements of generally accepted accounting principles (GAAP) for capital assets
- Identify the essential elements of system design for the management of capital assets, including specific policies related to capital assets.

[Click here](#) to learn more and to register.

Accounting and Financial Reporting for Investments - GFOA In-Person Training

May 14, 2024

**GFOA Training Center
203 N. LaSalle Street, Suite 2700
Chicago, Illinois**

Details:

The course will take a comprehensive look at the common investment instruments, including the accounting and required note disclosures for financial reporting in accordance with generally accepted accounting principles (GAAP). The materials will familiarize the participants with a variety of investment instruments, the purpose and the risks associated with each type of instrument, the process for valuing an investment, and the relevant accounting and note disclosures.

[Click here](#) to learn more and to register.

[The Brookings Institution: Putting Public Assets to Work Through Innovative Finance](#)

Wednesday, May 01, 2024
2:30 PM - 4:00 PM EDT

The Brookings Institution
Falk Auditorium
1775 Massachusetts Ave NW
Washington, DC 20036

The U.S. Department of Transportation (USDOT) Build America Bureau recently [announced](#) an unprecedented grant opportunity: the Innovative Finance and Asset Concession Program. The program makes available \$100 million in grants over five years to public entities doing pre-development work to structure public-private partnerships and other innovative finance and delivery mechanisms for transportation and transit-oriented development projects. The grant provides up to \$1 million in funding with no local match requirement and an additional \$1 million in funding with a match. Eligible applicants are public entities that own, control, or maintain assets that could be enhanced through projects eligible for [Transportation Infrastructure Finance and Innovation Act](#) (TIFIA) credit assistance.

For the last couple of years, the Government Finance Officers Association (GFOA) has been working with local governments across the country on a program called Putting Assets to Work (PAW). PAW inventories and maps all of the assets that a local government owns—including surface parking lots, pieces of right of way, and buildings—and helps local leaders think through unique and strategic development opportunities that can generate new revenues without selling assets.

On Wednesday, May 1, Brookings Metro will host the USDOT Build America Bureau and the GFOA Putting Assets to Work team to discuss the Biden administration's vision and new tools for empowering transit-oriented development, and how local leaders are evaluating the opportunity. Attendees should expect a constructive dialogue on status quo barriers to integrating transportation and land development, yielding an action agenda for how to overcome them.

[Attend in Person](#)

[Watch Online](#)

[BLX/Orrick 2024 Post-Issuance Compliance Webinar.](#)

2024 PIC Updates

Join BLX and Orrick on **May 7, 2024**, for insight on recent tax-exempt bond compliance developments from experts in the public finance and municipal bond industry. Topics to be covered include:

- **Washington Update** – Hear about the latest legislative discussions happening in DC, including the expiration of many of the provisions of the 2017 Tax Cuts and Jobs Act next year and the potential implications for tax-exempt bonds and tax reform.
- **Managing Positive Arbitrage** – Currently in the strongest positive arbitrage cycle in more than a decade, get tips for managing compliance and maximizing earnings.
- **Opportunities for Investing Bond Proceeds** – After a decade of interest rates at or near zero we are finally in an environment with higher rates and possible investment opportunities. A discussion of rates, investment options and balancing yield and potential risk.
- **Change In Use of Bond Proceeds** – Changes in the way some organizations operate after the pandemic have led to increases in the sale or lease of bond financed facilities. Understand the steps involved to preserve the tax-exempt status of your bonds in the event your organization is considering a change in use of bond proceeds from what was originally stated in the closing documents.
- **IRS Enforcement Update** – The IRS is adding staff and expected to increase the number of audits of tax-exempt bonds. Learn what your organization can be doing to be prepared.

CPE and CLE credits will be provided. For detailed information, [CLICK HERE](#).

This 1-hour Webinar will take place on **May 7 at 11 am PT / 2 pm ET**.

[Click here](#) to learn more and to register.

Make training a regular part of your organization's post-issuance compliance program and join us for this educational event.

For additional information on the webinar or the services BLX Group offers to assist you with your post-issuance compliance needs, please contact:

Cynthia Sixtos
csixtos@blxgroup.com
213 612 2207

[Inflation Reduction Act Elective Pay: Best Practices - GFOA Webinar](#)

April 30, 2024 | 2 pm - 4 pm ET

This webinar will discuss the Inflation Reduction Act's Elective Pay provision, any updates on guidance provided by Treasury, and best practices. The webinar will include lessons learned from early users of elective pay on the process of claiming and receiving the credit.

[Click here](#) to learn more and to register.

Arbitrage Rebate: Navigating Compliance and Maximizing Retained Earnings - Orrick Webinar Replay

Webinar | February.29.2024 | 2pm - 3pm (Eastern Standard Time)

After years of low investment returns, positive arbitrage is once again in the spotlight. For issuers, borrowers and financial professionals, it is crucial to refresh our understanding of the arbitrage rebate rules and regulations to safeguard the tax-exempt status of municipal bonds. The ability to navigate the delicate balance between retaining positive arbitrage and complying with federal tax law can translate into real dollars in the current interest rate environment.

Speakers include:

- Barbara League - Partner, Orrick
- Jenna Magan - Partner, Orrick
- Sandra Stallings - COO & Managing Director, BLX
- Alan Bond - Managing Director, BLX

Topics include:

- Pre-issuance considerations: Setting the stage for successful bond compliance.
- Arbitrage challenges: Addressing nuances of calculating and managing arbitrage rebate.
- Arbitrage opportunities: Strategies for keeping positive arbitrage. Recent case studies: Real-world examples illuminating key principles and best practices.
- IRS update: Stay informed on the latest developments and regulatory updates.

Please find a copy of the presentation [here](#) and a FAQ sheet answering the questions asked during the presentation [here](#).

Watch the webinar recording [here](#).

Identifying Component Units: GFOA Webinar

March 26, 2024 | 1 pm - 2 pm ET

Details:

The scope of public sector external financial reporting often extends beyond the reporting government to encompass one or more additional legally-separate organizations. This seminar examines the scope of the public sector financial reporting entity.

Learning Objectives:

- Understand the criteria used in establishing a primary government's financial accountability for a potential component unit
- Identify the two types of fiduciary component units and the criteria for their inclusion in a primary government's fiduciary funds financial statements

[Click here](#) to learn more and to register.

[NASBO Spring Meeting Registration Open.](#)

April 10-12 | Mobile, Alabama

[Click here](#) to learn more and to register.

National Association of State Budget Officers

[Small Government Forum: Three Years Later...How Has ARPA / SLFRF Impacted Small Governments? - GFOA Webinar](#)

March 14, 2024 | 3-4 p.m. ET

April 4, 2024 | 3-4 p.m. ET

Details:

Join the SGF for an update on the ARPA / SLFRF legislation and its impact on small governments. Includes a networking session on April 4.

Learning Objectives:

Attendees will receive updates on the ARPA / SLFRF timeline.

Attendees will be provided with examples of how Non-entitlement Units of Local Government have allocated the funds for various projects.

Attendees will learn how ARPA / SLFRF has possibly changed the mindset of the federal government for disbursing funds to state and local governments.

Member Price: \$35.00

Non-member Price: \$70.00

[Click here](#) to learn more and to register.

[Governmental Accounting for Non-Accountants: GFOA Webinar](#)

March 18, 2024 | 1 pm - 3 p. ET

Details: Accounting and financial reporting form an essential component of the informational infrastructure that undergirds state and local government finance. Decisions are only as good as the information that supports them. This training provides an introduction designed to equip participants to better understand state and local government financial reports.

Who Will Benefit: Government professionals with a limited or no background in accounting and financial reporting.

Learning Objectives:

Those completing this seminar will be able to:

- Recognize the role of accounting and financial reporting in the governmental environment.
- Identify the “players” (financial statement users, preparers, auditors)
- Name the “rules of the game” (generally accepted accounting principles – GAAP)
- Identify what fund accounting is and how it works (fund categories and fund types)
- Discern what different funds measure and when they measure it (measurement focus and basis of accounting)
- Recognize the important elements of government-wide financial statements and their relationship to fund financial statements (how does the information differ and why?)
- Ascertain where to look for additional information to help understand the financial statements and how to use that information (annual comprehensive financial report)

Member Price: \$85.00

Non-member Price: \$170.00

[Click here](#) to register.

[Where Does the Money for Affordable Housing Come From? - Dykema Podcast](#)

How do you bridge the gap between development costs and what low-income renters can afford? Among other sources, public funding efforts play a big role in ensuring access to safe and stable housing options for those less fortunate. Rochelle Lento and Jarrod Smith, leaders of Dykema’s Affordable Housing and Public Finance groups, respectively, discuss how their practices intersect to create solutions that funnel money into subsidized housing projects for our communities.

[Listen to the podcast.](#)

Dykema

2.22.24

[From Burden to Benefit: Transforming Property Tax Challenges into Opportunities - GFOA Webinar](#)

March 28, 2024 | 3 pm - 4 pm ET

Details:

Property tax is the most important source of revenue for local governments. Given that local governments are defined by their geographical boundaries, their property tax revenues are a function of the value of the land within their jurisdiction, and how it is used.

Local assessors are charged with determining the accuracy and fairness of a community’s property tax. Property taxes are often regressive with lower priced properties assessed at a higher value relative to their sale price than more highly valued homes. This means that lower value properties bear a disproportionate burden on the owners of lower value homes. This webinar will explore

potential explanations for this pattern as well as possible policy solutions. It will also delve into how local governments can rethink their current land usage patterns, especially ways in which land use planning and finances can be used to boost the revenue productivity of the tax base. Please join us to hear from Chris Berry about issues with the way property tax assessments create persistent inequities, as well as from Fritz Kaegi from the Cook County Assessor's Office and Dawn Marie Buckland from the Maricopa County Assessor's Office.

[Click here](#) to learn more and to register.

Government-wide Financial Statements, Conversions and Consolidations: GFOA Webinar

Details:

The seminar will furnish participants with the basic information needed to prepare government-wide financial statements, and the necessary journal entries to convert and consolidate fund financial statements to government-wide financial statements.

[Click here](#) to learn more and to register.

California Municipal Finance Institute Conference.

December 11-12, 2024

The Meritage

875 Bordeaux Way, Napa, CA

Designed for city officials and staff involved in fiscal planning for municipalities, the Municipal Finance Institute connects finance directors and other municipal finance professionals with the essential information they need for their job.

Finance Directors with a CPA Can Earn Continuing Professional Education (CPE)

Finance professionals who hold a license as a California certified public accountant (CPA) through the California Board of Accountancy will be eligible to earn Continuing Professional Education credits during the institute.

For registration questions, please contact Registrar, [Megan Dunn](#).

For sponsorship questions, please contact Associate Manager, Exposition Sales and Event Sponsors, [Amy Wade](#).

For additional questions, please contact Associate Manager, Event Program, [Erin Wylder](#).

Please see our [event and meeting policies](#).

[Registration for NFMA 2024 Annual Conference in Philadelphia.](#)

The National Foundation of Municipal Analysts has opened registration for the 2024 Annual Conference to take place at the Loews Philadelphia Hotel.

To view the program, [click here](#).

To register, [click here](#).

[Government-Wide Financial Statements, Conversions and Consolidations: GFOA Webinar](#)

February 28, 2024 | 1 pm - 3 pm ET

Details:

The seminar will furnish participants with the basic information needed to prepare government-wide financial statements, and the necessary journal entries to convert and consolidate fund financial statements to government-wide financial statements.

Who Will Benefit: CFO/Finance Director, Controller, Accountant, Auditor

Learning Objectives:

Those who successfully complete this seminar should be able to:

- Understand the measurement focus and basis of accounting for government-wide financial statements
- Identify the elements and format of each government-wide financial statement
- Perform the necessary conversion and consolidation entries for the government-wide statements

[Click here](#) to learn more and to register.

Member Price: \$85.00

Non-member Price: \$170.00

[Correctly Calculating Net Investment in Capital Assets: GFOA Webinar](#)

February 5, 2024 | 1 pm - 2 pm ET

Details:

The calculation of net investment in capital assets has proven challenging to many governments because of the wide variety of transactions and other events that must be considered. This class will begin by providing participants with a conceptual understanding of net investment in capital assets as a classification of net position in multiple reporting units presented in financial statements and

annual comprehensive financial reports prepared in accordance with generally accepted accounting principles. Then, those concepts will be applied to example facts and circumstances that are faced by preparers of GAAP-based state and local government financial statements.

Learning Objectives:

- Those who successfully complete this seminar should be able to identify:
- The role of net investment in capital assets as a component of net position
- The reporting units for which a net investment in capital assets is calculated
- Capital vs. noncapital liabilities and deferred resource flows
- Frequent missteps in the calculation of net investment in capital assets.

[Click here](#) to learn more and to register.

Fitch Ratings to Host 2024 U.S. Public Finance Outlook Series

Fitch Ratings-New York-20 December 2023: Join Fitch Ratings for our virtual 2024 U.S. Public Finance Outlook Series starting on Jan. 4. Gain valuable insights from Fitch's USPF sector heads as they delve into the rationale and considerations behind their 2024 sector outlooks.

You can learn more about each event below.

[Click here](#) to learn more and to register.

Best Practices in Debt Issuance and Management: GFOA In-Person Training

April 10 & 11, 2024 | 8:30 am - 4:30 pm CT

Hyatt Regency Bloomington - Minneapolis
3200 E 81st St
Bloomington, Minnesota

Details:

This course, focused on GFOA's Best Practices in Debt Management, will help participants better understand how to develop appropriate policies and procedures for issuing debt and overall debt management. In addition to the best practices, the course will feature practical examples, details on recent federal rulemaking, including how it impacts governments, and interactive discussion on the following topics:

- Debt Issuance
- Selecting Municipal Finance Professionals
- Disclosure Practices and Investor Relations
- Financing Instruments and Techniques
- Federal Securities and Tax Laws Applicable to Issuers of Municipal Debt
- Ongoing Debt Management

[Click here](#) to learn more and to register.

Revenue Policies: GFOA In-Person Training

January 23, 2024 | 8:30 a.m.-4:30 p.m. ET

Grand Hyatt DC
1000 H Street
Washington, District Of Columbia

Details:

When we talk about developing a budget that supports a thriving community, we often spend most of our time and energy thinking about the expenditure side of the equation: what are the local government's priorities and goals and how much is it going to spend to achieve those goals? The revenue side of the equation is just as important to building a strong financial foundation that supports a thriving community, though. In this course, learn how to evaluate your local government's revenue portfolio using the five pillars of the Financial Foundations Framework.

Please note that this course is *not* focused on the technical aspects of forecasting revenue.

[Click here](#) to learn more and to register.

School Budgeting Best Practices: Virtual Readiness Workshop: GFOA eLearning Course

January 10-12, 2024

Details:

This seminar will provide participants with an opportunity to acquire hands-on, practical implementation of GFOA's best practices in school budgeting. The program is structured around the new best practices in school budgeting, which include guidelines to develop a comprehensive budget process that fosters collaboration between academic and finance staff to develop strategic goals and allocate scarce resources accordingly. The end goal of the new budget process focuses on aligning these scarce resources to focus on optimizing student achievement. In addition to the best practices, tools from GFOA's Smarter School Spending website will be highlighted and used as examples for participants to better understand and apply to their own budgets.

[Click here](#) to learn more and to register.

Preparing an Annual Comprehensive Financial Report: GFOA eLearning Course

January 9-11, 2024

Details:

This program is designed to familiarize participants with the format and contents of an annual comprehensive financial report (ACFR) prepared in accordance with generally accepted accounting principles (GAAP) and GFOA's Certificate of Achievement award program criteria. Attendees will examine in detail each section of an ACFR, in order to understand the required format and necessary information to be included in each. Each training module will focus on specific sections of an ACFR and feature both presentation and interactive discussion/exercises.

[Click here](#) to learn more and to register.

GFOA 2023 GAAP Update Encore.

December 14, 2023 | 1 pm - 5 pm ET

Details:

GFOA will offer its 2023 Governmental GAAP Update on November 2, 2023 and December 14, 2023, using GFOA's online learning management system (LMS).

Participate in interactive exercises to test your knowledge of the material being presented. Receive immediate feedback to your questions during the program from GFOA's Technical Services Center staff. Four CPE credits will be awarded with your participation.

This year's event will cover:

Last-minute pointers on standards being implemented now, including on Subscription-Based Information Technology Arrangements, Public Private and Public-Public Partnerships and the 2022 Omnibus

Upcoming implementations new GASB Statements

- GASB 100, Accounting Changes and Error Corrections
- GASB 101, Compensated Absences
- [Anticipated] GASB 102, Risks and Uncertainties Disclosures

New GASB implementation guidance

Be prepared for your upcoming financial statement and federal funds Single Audit

Special Segment - Panel Discussion

- Successful strategies for hiring to fill accounting and auditing positions

[Click here](#) to learn more and to register.

Best Practices and Strategies for Public Investing: GFOA eLearning Course

December 5, 6 & 7, 2023 | 1-4 pm ET

This course offers attendees a comprehensive agenda of the concepts and techniques needed to effectively manage their investment portfolios. This two-day course highlights the importance for governmental entities to have a robust investment policy and corresponding procedures, and brings attention to GFOA's best practices related to investing. Through interactive activities and classroom presentations, attendees will gain a better understanding of the various elements of an investment program, whether the portfolio is managed internally or externally. Topics covered include:

- Investment Program
- Investment Policy
- Cash Flow Forecasting & Investing
- Roles and Responsibilities of Internal and External Professionals
- Investing Strategies
- Investment Reporting
- Performance Measurement and Benchmarking
- Internal Controls
- Case Studies
- Market Update

[Click here](#) to learn more and to register.

[Accepting Credit Card Payments: What Governments Should Know About Vendor Services, Fees, and Risks - GFOA Webinar](#)

December 12, 2023 | 1 pm -3 pm ET

Many governments accept credit and debit card payments for the variety of taxes and fees imposed on citizens and users. In the public sector there are a variety of special considerations that must be addressed if governments wish to accept credit and debit cards as payment methods.

Some of the key considerations related to accepting credit and debit cards include:

- Whether cards can be accepted for all or some government services
- Understanding the costs and rules that are in place for governments to accept credit/debit cards
- Managing upgrades and opportunities presented through technology changes

In addition, governments must be aware of the Payment Card Industry (PCI) Data Security requirements and the general fraud and security risks associated with accepting credit cards.

This session will provide attendees with insights from industry experts, case studies, and discussion questions focused on the numerous issues related to accepting credit and debit card payments that are in play for governments of all sizes and types.

[Click here](#) to learn more and to register.

[Disclosure Update: GFOA Webinar](#)

November 29, 2023 | 1 pm - 3 pm ET

Issuers of municipal securities have numerous disclosure responsibilities related to their bond transactions. This includes mandated filings of annual financial information and material event notices in the MSRB's EMMA system, and other types of voluntary disclosures. Industry experts will discuss these issues as well as recent SEC activities related to disclosure. A review of GFOA's best practices and the importance of developing and maintaining disclosure policies and procedures will also be addressed.

[Click here](#) to learn more and to register.

Cash Flow Forecasting: Developing the Right Approach for Your Entity - GFOA Webinar

November 15, 2023 | 1-3 p.m. ET

Details:

Governments should have a solid understanding of the movement of funds in and out of the organization. Cash flow analyses should be conducted regularly to estimate expected inflows and required disbursements during a given period to ensure sufficient liquidity. These can include tax and fee receipts, investment income, grants, or other revenues; and vendor payments and payroll expenses. Such an analysis is intended to measure and assess governments' abilities to meet financial needs and prevent the need for short term borrowing, tapping into an entity's reserve fund and limiting idle cash balances.

Governments should create a strategy for cash flow forecasting and analysis. This course will provide an overview of cash flow forecasting activities, discuss details of what is included in a cash flow analysis and how to conduct one, and outline the type of information governments should be tracking in order to conduct an accurate analysis.

[Click here](#) to learn more and to register.

Budget Document Basics: GFOA eLearning Course

Nov 14, 15 & 16, 2023

Details:

Most, if not all, local governments produce a budget document every year as one of the final steps in their budget process, but do they know who is reading it and what they think of it? This course will encourage finance and budget staff to think critically about why their local government publishes a budget document and what they are communicating so that they can produce a document that is more useful for both internal and external stakeholders. By pointing out some of the limitations of the budget document as a communications tool, the course will also encourage attendees to think about how their organization's budget document fits in with its broader budget communications strategy and how to develop other means of communication to complement the budget document.

[Click here](#) to learn more and to register.

NFMA High Yield Advanced Seminar.

The NFMA will hold an Advanced Seminar on High Yield Bonds at the Grand America Hotel on **February 1 & 2.**

To view the program for the seminar, [click here](#).

To register, [click here](#).

National Federation of Municipal Analysts

Reminder: BLX/Orrick 2023 Post-Issuance Compliance Workshop - Nov. 16 & 17

A Comprehensive Overview of Post-Issuance Compliance and Secondary Market Disclosure Rules and Regulations for 501(c)(3) Organizations and State and Local Government Issuers Who Utilize Tax-Exempt Financing

[Click here](#) to learn more and to register..

Political Climate Change - Public Finance and the Partisan War on ESG: Bowditch Webinar

NOVEMBER 14, 2023 - WEBINAR

Increasingly, investors are considering the impact of severe weather events, climate-related risks and socio-economic challenges, across the United States and around the world, as they make investment decisions. In response to this growing popularity, the financial markets have incorporated environmental, social and governance (“ESG”) factors into certain investment vehicles, in order to align socially responsible business practices with positive financial returns. The municipal securities market has been at the forefront of this movement, with investors and rating analysts taking ESG factors into consideration in evaluating an issuer’s or conduit borrower’s overall financial condition, operations and future prospects.

On November 14, Neal Pandozzi and Andrew Stern of Bowditch’s Public Finance team will take a deep dive into this topic, discussing the evolution of ESG in public finance transactions, from its beginning as a fairly innocuous marketing tool to its present iteration as a political flashpoint in the partisan culture war on “wokeness” in the United States. Particularly, they will review the different state-by-state approaches to regulating the use of ESG factors by various municipal market participants. Additionally, recent developments in cybersecurity disclosure relative to ESG will be discussed.

WHO SHOULD ATTEND?

This webinar is designed for members of the public finance community who would like to explore the topic of ESG in greater detail, particularly with regard to the complications, roadblocks and

opportunities presented by the ESG backlash at the state level.

The webinar will include a question-and-answer session.

NOVEMBER 14, 2023 1 - 2 PM

[REGISTER](#)

Compensated Absences: GFOA Webinar

GASB's new guidance on compensated absences provides a unified recognition and measurement model for all types of compensated absences. This session will examine the various types of leave organizations provide to their employees, the ways in which the obligations for compensated absences are incurred and settled by governments, and how these obligations are properly accounted for, reported, and disclosed.

[Click here](#) to learn more and to register.

Overview of Public Procurement: GFOA Webinar

Procurement is an essential function for all governments and serves to provide service that connects public sector operations with private sector suppliers, contractors, and providers. High performing procurement functions not only support government's responsibility to use resources effectively, they also promote efficient operations, reduce business continuity risk, and work to maintain trust in government. Unfortunately not all organizations utilize procurement to its full strategic potential. In this course, instructors will cover the basics of public procurement, provide an overview of key processes and policies, highlight important features and tools of modern procurement functions, and explain how the profession is evolving to better meet the needs of governments.

[Click here](#) to learn more and to register.

Get Important GASB Guidance During GFOA's 2023 Governmental GAAP Update.

We'll take a deep dive into GASB statements during this year's GAAP Update, Thursday, November 2. This includes last-minute pointers on **GASB 96**, as well as guidance on **GASB 100**, *Accounting Changes and Error Corrections*, **GASB 101**, *Compensated Absences*, and the anticipated **GASB 102**, *Risks and Uncertainties Disclosures*.

Can't attend on November 2? Join our December 14 encore and save on registration.

[REGISTER](#)

[Save the Date! NFMA High Yield Seminar.](#)

The NFMA will hold an Advanced Seminar on High Yield Bonds in Salt Lake City on **February 1 and 2**. Watch for the program and registration in the near future.

[Understanding the Outlook for City Infrastructure Investment and the Municipal Finance Market: NLC Webinar](#)

Municipal bonds are the crucial tool cities use to finance essential projects — accounting for nearly 70% of all financing for public infrastructure like roads and water and sewer utilities. “New-money” bond sales for essential projects have ramped up in the second half of 2023, and the trend is expected to continue in 2024, driven in part by the need to raise matching funds to unlock Federal infrastructure grants.

While the municipal bond market remains flexible and responsive to Cities’ needs, the higher interest-rate environment means local leaders may need to work harder to attract investors to their projects and keep the cost affordable.

Join NLC partner Build America Mutual and market experts on **Tuesday, December 14 at 2:30 PM ET** for an update on trends in the market and what city leaders should focus on when preparing to sell bonds in the coming year.

[Click here](#) to register.

National League of Cities

[Avoiding Fraud in Treasury Operations: GFOA Webinar](#)

October 26, 2023 | 1 - 3 pm ET

Governments must incorporate prevention measures against both internal and external fraudulent activity. In the treasury office, this is especially of importance since public funds are at risk. Utilizing appropriate solutions to identify, mitigate and recover from fraud events are essential skills for treasury and finance professionals. This course will assist finance officers with developing, reviewing, and updating their policies and procedures related to fraud prevention. Key components of the training will include: “Understanding potential types of internal and external fraud activity in the treasury office” “Developing policies and procedures to guard against fraud” “Implementing processes to monitor internal and external treasury functions to avoid fraudulent activity” “Special topic on electronic fraud vulnerabilities” “Knowing what steps should be taken if fraud is identified” “Reviewing fraud cases studies from local governments.

[Click here](#) to learn more and to register.

GFOA: Fundamentals of Preparing an Annual Comprehensive Financial Report

GFOA eLearning Course | Oct 24 - 26

Fundamentals of Preparing an Annual Comprehensive Financial Report The program is designed to familiarize participants with the format and contents of a comprehensive annual financial report prepared in accordance with both generally accepted accounting principles (GAAP) and the program requirements of the Government Finance Officers Association's (GFOA) Certificate of Achievement for Excellence in Financial Reporting Program criteria. Attendees will examine in detail each section in order to understand the required format and necessary information to be included in each.

[Click here](#) to learn more and to register.

GovFin 2023: Empowering Governments, Modernizing Reporting Conference

November 9, 2023 | 8:45 AM - 6 PM ET

MSRB Board Member Liz Sweeney and Director, Data Analytics Karl Eiholzer will be panelists discussing automating state and local government reporting.

[Click here](#) to learn more and to register.

Bonding Time: DC Update - Discussion with GFOA on the 2023 Legislative Outlook for Municipal Bonds

The BDA's most recent episode of Bonding Time features a discussion with Emily Brock of the Government Finance Officers Association. The podcast was led by Brett Bolton of the BDA and covers:

- Current Status of the budget discussions in DC and potential impacts on issuers and direct-pay bonds;
- An update on the Financial Data Transparency Act;
- Municipal bond legislative outlook for the remainder of 2023 and beyond;
- An update on GFOA activities in DC.

[Listen to audio.](#)

Bond Dealers of America

September 22, 2023

New T.A.D. Video: Lease & SBITA Prepayment Accounting

In this Timely Accounting Discussion, we focus on how to account for prepayments as they apply to

lease and SBITA arrangements. This quick overview will show the effect prepayments have on lease/subscription liabilities and right-to-use assets, and show example journal entries.

[Watch video.](#)

[Join CDFA in Philadelphia for the 2023 National Development Finance Summit!](#)

The CDFA National Development Finance Summit brings together leaders and dealmakers in the development finance industry to discuss best practices, trends, and project financing solutions. Join us in Philadelphia to be a part of the conversation, we can't wait to see you!

[Click here](#) to learn more and to register.

[Tax Compliance for Debt Issuers: GFOA Webinar](#)

September 20, 2023 | 1 pm - 3 pm ET

Governments that issue debt have numerous federal laws that they must abide by at the time of issuance and for the lifetime of the bonds. That includes various provisions in tax law.

This course will provide an overview of tax laws related to municipal bonds, and the responsibilities of issuers in this process. These include understanding the issue price of the bonds, calculating arbitrage and arbitrage rebate rules, yield restrictions of bond proceeds investments, private use limits, record retention guidelines, and the IRS's Tax Exempt Bond audit program.

The course will also provide tools on how issuers can best comply with these rules, and the types of conversations they should have with bond counsel about these matters.

[Click here](#) to learn more and to register.

[NFMA Introduction to Municipal Bond Credit Analysis](#)

On **November 16 & 17**, the NFMA will offer the Introduction to Municipal Bond Credit Analysis at the Sonesta Philadelphia Rittenhouse Square. This program is designed for new analysts, sales and support personnel, and others who wish to expand their knowledge of municipal bond credit analysis.

[Click here](#) to view the program.

[Click here](#) to register.

GFOA's Alliance for Excellence in School Budgeting Fall Meeting.

Join us for GFOA's Alliance for Excellence in School Budgeting Fall Meeting on **November 2-3 in Chicago, Illinois**. Attendees will explore topics including GFOA's Smarter School Spending Framework, academic return on investment, optimizing scheduling strategies, integrating a logic model into your budgeting approach, and more.

[REGISTER](#)

New T.A.D. Video: Accounting for the Opioid Settlement Payments

This episode features information on the opioid settlement payments that many governments are receiving. Watch as we discuss how this money should be accounted for.

[WATCH](#)

The FAF's Bridging the GAAP Podcast is Now Available. In Episode 1, GASB Chair Joel Black Talks About the Financial Data Transparency Act.

[Listen to the Podcast.](#)

[08/21/23]

BLX/Orrick 2023 Post-Issuance Compliance Workshop.

November 16-17, 2023 - Los Angeles and Virtual Webinar

A Comprehensive Overview of Post-Issuance Compliance and Secondary Market Disclosure Rules and Regulations for 501(c)(3) Organizations and State and Local Government Issuers Who Utilize Tax-Exempt Financing.

[Click here](#) to learn more and to register.

Financing Essential Infrastructure: NLC 2023 Municipal Bond Market Update

Municipal bonds are the crucial tool cities use to finance essential projects — accounting for nearly 70% of all financing for public infrastructure like roads and water and sewer utilities. On **Monday, September 25 at 2:00 p.m. ET**, join NLC, Build America Mutual and market experts for an update on trends in the market and what city leaders should focus on when preparing to sell bonds.

The session will also highlight recent innovative transactions, like how the State of Connecticut was able to save \$200 million when it set up a trust fund to provide “baby bonds” for all Medicaid-eligible

babies born in the State.

[Click here](#) to register.

[Navigating the Next Frontier: AI's Role in Reshaping Local Governance - GFOA Webinar](#)

Artificial intelligence (AI) will someday be ubiquitous in government operations. Should workers be threatened? No. What's most important is to understand what AI is, the benefits, and the limits. Join this webinar, **October 12**, to hear from leading experts from Microsoft, Rutgers, and the City of Columbus on how they utilize AI. Participants will walk away with a better understanding of AI, why human interaction is still important, and how successful organizations in the future will manage AI to make better decisions.

[REGISTER](#)

[Get Key Municipal Insights at GFOA's MiniMuni.](#)

Registration is free for GFOA members! Join us online for GFOA's 5th Annual MiniMuni Conference on **October 11-13**. Engage with experienced practitioners and regulators on topics influencing municipal issuers. Whether it's ESG considerations or the Financial Data Transparency Act, participants will leave with a comprehensive grasp of the market's most urgent concerns.

[LEARN MORE](#)

[Why it's Time to Rethink Reserves: GFOA Webinar](#)

THU, 24 AUG | 1 PM ET

Governments are subject to financial shocks, including natural catastrophes, recessions, and more. Financial reserves (a "rainy day" fund) are essentially a form of self-insurance that governments use to buffer themselves against these risks. But what are the risks governments should be concerned about and what size of reserves are appropriate to those cover risks?

Speakers in this session will answer these questions and more. Participants will leave with resources and strategies to apply risk-aware and risk-savvy thinking to reserves in their own organizations.

[Click here](#) to learn more and to register.

[NFMA Advanced Seminar on Transportation.](#)

The NFMA will hold an Advanced Seminar on Transportation in **Chicago on October 12 & 13**. This

event is open to members and non-members, but not the press.

To view the program, [click here](#).

To register, [click here](#).

Overview of a Bond Issuance: GFOA eLearning Course

August 15, 16, 17 2023 | 1-4 p.m. ET

Details:

Governmental entities have been using debt for over 200 years to fund public infrastructure such as government buildings, water distribution systems, schools, police stations, and many other projects that require significant capital investment.

Debt issuance is a significant undertaking for governments, whether an entity frequently or infrequently issues debt. This includes engaging in a great deal of work prior to the transaction and ongoing for the lifetime of the bond. Issuers must manage the financing, make decisions about the structure and type of debt being issued, understand market conditions and the timing of the issuance, select and manage a number of external professionals during this process, and execute all post issuance debt management requirements. This course will provide an overview of the debt issuance process and explain the obligations finance officers must address when taking on a bond issuance, with a focus on GFOA's best practices as guidance.

Who Will Benefit: CFO/Finance Director, Controller, Budget Manager, Treasurer, Debt Manager

Learning Objectives:

Those who successfully complete this seminar should be able to:

- Learn about GFOA's Debt Management Best Practices and Debt Issuance Checklist
- Be aware of the internal and external professionals involved in a debt issuance
- Understand how to evaluate and select the method of sale
- Know the factors in determining timing, structure and type of bonds to issue
- Understand the process of obtaining a credit rating
- Identify post issuance responsibilities, including those related to federal tax and securities laws

Member Price: \$315.00

Non-member Price: \$630.00

[REGISTER](#)

New GFOA Video: Legacy Lease Accounting

Our latest Timley Accounting Discussion video covers legacy lease accounting, including lease assets vs. leased assets, leases in the calculation of net investment in capital assets, and accounting and financial reporting for contracts that transfer ownership.

GFOA's 5th Annual MiniMuni Conference Free for Members.

Register now for this three-day virtual event, **October 11-13**. Don't miss the opportunity to hear from leading experts, seasoned practitioners, and regulators on a host of issues that impact municipal issuers.

[Click here](#) to learn more and to register.

XBRL US Hosts GovFin 2023: Empowering Governments, Modernizing Reporting

NEW YORK , July 24, 2023 /PRNewswire/ — XBRL US announced that they will be hosting a one-day conference, GovFin 2023: Empowering Governments, Modernizing Reporting, in **Washington, DC , on Thursday, November 9, 2023**. This educational forum will focus on the passage of legislation including the Financial Data Transparency Act (FDTA), and the Grants Reporting Efficiency and Transparency (GREAT) Act, and on how governments can explore what data standards are, and how they improve efficiencies and modernize reporting. The conference will be hosted by KPMG at their offices at 1801 K Street NW, in Washington, DC .

"This is a critical year for standardized data reporting for government entities and U.S. regulators given the recent legislation and an increasing demand for better, more actionable data from analysts, academic researchers, and policy-setters," said Christine Kuglin , conference Chairperson and Professor, Daniels College of Business, University of Denver . "Government entities have much to gain from the innovation and modernization that these new standards can bring."

The conference will feature case studies on federal standards programs implemented by the Federal Energy Regulatory Commission (FERC) and the Securities and Exchange Commission (SEC), as well as local government case studies in Michigan and Colorado . Panel discussions and demonstrations will address legal entity identifiers and the mechanics of creating and using structured, standardized data. Regulators and standards organizations will discuss the municipal securities elements of the FDTA.

Speaker organizations confirmed to date include:

- Bloomberg L.P.
- Center for Local State and Urban Policy (CLOSUP) at the University of Michigan
- Data Foundation
- Department of Management and Budget, Wayne County, Michigan
- Global Legal Entity Identifier Foundation (GLEIF)
- Governmental Accounting Standards Board (GASB)
- Municipal Securities Rulemaking Board (MSRB)
- Office of Inspector General, U.S. Department of Education
- Office of Structured Disclosure, Division of Economic and Risk Analysis, U.S. Securities and Exchange Commission (SEC)
- Office of Municipal Securities, U.S. Securities and Exchange Commission (SEC)

- Tenbar Capital
- The Cato Institute
- Truth in Accounting
- U.S. Federal Energy Regulatory Commission (FERC)

[Click here](#) to view the full agenda and register.

About XBRL US

XBRL US is the non-profit consortium for XBRL business reporting standards in the US and represents the business information supply chain. Its mission is to support the implementation of business reporting standards through the development of taxonomies for use by US public and private sectors, with a goal of interoperability between sectors, and promoting XBRL adoption through marketplace collaboration. XBRL US has built standards for government agencies including the Securities and Exchange Commission, the Federal Energy Regulatory Commission, and the Department of Energy, as well as industry sponsored standards for surety insurance, municipal government reporting, and corporate actions. <http://xbrl.us>

[Accounting for Pensions and Other Postemployment Benefits: GFOA In-Person Training](#)

July 27, 2023 | Chicago, IL

[Click here](#) to learn more and to register.

[Asset Management for Finance Officers: GFOA Webinar](#)

July 26, 2023 & July 27, 2023 | 1-4 p.m. ET

[Click here](#) to learn more and to register.

[2023 California Economic Summit Opens Registration.](#)

Oct 11-13 | Indian Wells

[Click here](#) to learn more and to register.

[Registration Opens for GFOA 2023 GAAP Update.](#)

This year's GAAP Update, **November 2** with an encore presentation on **December 14**, will feature last-minute pointers on standards being implemented now, including Subscription-Based Information Technology, as well as important implementation information on GASB 100, *Accounting Changes and Error Corrections*, GASB 101, *Compensated Absences*, and the anticipated GASB 102, *Risks and*

Uncertainties Disclosures.

[LEARN MORE](#)

[National Federation of Municipal Analysts Webinars - Financial Data Transparency Act 101 and 201](#)

July 20 - FDTA 101 will focus on the FDTA's requirements, timelines, implementation, unknowns, and the role of standards bodies in the process. This webinar will also provide a grounding in FDTA terminology (i.e., machine-readable, taxonomy, data standards, non-proprietary, semantic meaning), why the terminology is so specific, and what that means for FDTA implementation and for data users.

August 3 - FDTA 201 will focus on potential benefits to the user community of harnessing the power of structured data required under the FDTA, the importance of NFMA community participation in the standards development process, and the perspectives of an issuer with experience in applying machine-readable data standards to financial statements.

FDTA 101 is open to all; FDTA 201 is open to NFMA members only.

To learn more and to register for FDTA 101, [click here](#).

To learn more and to register for FDTA 201, [click here](#).

[2023 Water Finance Conference returning to Cleveland in August.](#)

9th annual event to feature expert presentations and discussions around water/wastewater utility finance, customer affordability, Bipartisan Infrastructure Law, Lead and Copper Rule Revisions, and much more. The 2023 Water Finance Conference, an educational seminar exclusively for water utility finance professionals, is returning to Cleveland, Ohio.

[READ MORE](#)

JULY 6, 2023

[Applications Open for GFOA Fall Leadership Academy.](#)

GFOA's week-long Leadership Academy, **November 12-17, at the College of Charleston**, provides senior public and government finance professionals an opportunity to bolster their leadership and management skills to better serve their communities. The deadline to apply is August 31.

[LEARN MORE](#)

[Join GFOA for Training in Denver this August.](#)

GFOA is offering a series of CPE-accredited courses **August 8-11, 2023** including: Overview of Grants Management, Accounting for Capital Assets, Budget Analyst Training Academy, and ERP Readiness and System Selection.

[Click here](#) to learn more and to register.

[Understanding Government Compensation and Payroll: GFOA Webinar](#)

June 20, 21 & 22 | 1-4 PM ET

Details:

Many finance officers have responsibility for payroll. With that comes responsibility for managing a process that accounts for approximately 85% of an organization's operating budget, requires compliance with an ever changing set of state and federal legislative and regulatory requirements, is further complicated by unique collective bargaining requirements, and is critically important to each and every employee in the organization. And while just about every organization is able to manage these tasks routinely, there are often opportunities for significant improvements. This session will explore best practices in managing payroll, how to incorporate internal controls, use of technology, recommendations on dealing with an every changing set of compliance requirements.

The course will be taught as a mixture of presentation and open discussion. Panelists will include several consultants and service providers who work to drive efficiencies in payroll processing and can discuss common challenges that governments face, tools and techniques that can be applied, and innovative and new solutions that may be available from your technology partners.

Learning Objectives:

- Learn the basic steps involved in the payroll process
- Understand different methods for time entry and different purposes for tracking time
- Differentiate between compensation models
- Learn best practices related to budgeting for personnel
- Understand the overlapping network of regulations related to payroll and how to keep up with changes
- Discuss challenges related to hiring and retaining employees and strategies to address these challenges

[Click here](#) to learn more and to register.

[Bonds 101 For Small Government Finance Officials: GFOA Webinar](#)

June 8, 2023 | 3 p.m.-4 p.m. ET

Details:

Periodically, government entities will need to authorize and issue debt for projects. In this session, we will discuss the basics for issuing debt for a unit of local government. During the entire debt issue process, finance officers will constantly communicate with various professionals, including bond counsels, municipal advisors, underwriters, and the rating agencies. Specifically, finance officers will be advised on how to structure the debt payments. In addition, these professionals will assist the finance officers in achieving the best credit rating possible. Such ratings will be beneficial when the bonds are sold by the government entity. Since the macroeconomic environment is constantly changing, government finance officers will always benefit from future learning opportunities related to issuing debt.

[Click here](#) to learn more and to register.

[Attend GFOA Accounting Training in Chicago in July.](#)

Need accounting help? We're bringing in-person training back to Chicago in July with Advanced Governmental Accounting (July 18-19), Intermediate Governmental Accounting (July 25-26), and Accounting for Pensions and Other Post Employment Benefits (July 27).

[Click here](#) to learn more and to register.

[Upcoming NFMA Webinar on ETF Essentials for Muni Analysts.](#)

The Webinar Subcommittee will present ETF Essentials for Muni Analysts on **June 22**. This webinar will include a discussion about how fixed income ETFs work, how they are used, their influence on market structure and how they telegraph market sentiment. NFMA members may register for free; non-members may attend for a \$100 fee. Press is not permitted to attend.

To register, [click here](#).

[NASBO 2023 Introduction to State Budgeting Seminar.](#)

August 23-25 | Austin, Texas

[Click here](#) to learn more and to register.

[GFOA Webinar: ERP Project Readiness](#)

Thursday, June 1, 2023

[VIEW DETAILS](#)

Water Security in a Changing Environment: MAGNY Webinar

Date: Thursday, May 25, 2023

Time:

Zoom Meeting Time: 12:00 – 1:00 pm ET

Location:

Zoom ONLY

Details:

Increased hydrological volatility has altered the landscape for western region water suppliers. Despite favorable 2023 conditions thus far, the Colorado River remains stressed, prompting potential unprecedented federal actions. This panel will explore potential water right resolutions and what the outcome could mean for water supply in California, Arizona, and Nevada. How will potentially shifting water allocations affect public finance credits in the region and how are highly rated managers responding?

[Click here](#) to learn more and to register.

NASBO Annual Meeting.

July 16 - 19 | Wilmington, DE

[Click here](#) to learn more and to register.

Delivering the Infrastructure Decade: Addressing Implementation Challenges at the State and Local Level

Thursday, May 18, 2023 | 9:30 AM EDT - 10:30 AM EDT | The Brookings Institution

With the passage of the Infrastructure Investment and Jobs Act (IIJA) and the Inflation Reduction Act (IRA), funds are actively flowing into states and localities. That means the hard work now passes to cities, counties, and states to get the greatest value out of the new laws—but also puts the greatest pressure on officials outside Washington to come up with solutions.

On Thursday, May 18, Brookings Metro, as part of the national United for Infrastructure Week 2023, will host an event focused on the implementation challenges confronting states and communities. Speakers with expertise across multiple infrastructure sectors will address many of the fiscal, workforce, and equity concerns that public officials now face—and offer solutions to help overcome them.

[Click here](#) to learn more and to register.

[Attend GFOA In-Person Training in New Orleans Next Month.](#)

GFOA is headed south for in-person training **June 26-29** in New Orleans. Available classes include Accounting Academy, Revenue Policies, Overview of Public Procurement, and the Role of the Finance Officer in the Budget Process.

[Click here](#) to learn more and to register.

[GFOA Art of Budget Communications Coming to Chicago in June.](#)

Communication is essential for developing a local government's budget. Planning, strategizing, and negotiating are some of the most important skills that a finance officer must employ to develop and manage a budget effectively, and good communication is at the core of mastering these skills. This course, **June 7-8**, will explore the pros and cons of different communication tools, address public engagement, and explain how the typical budget hearing is an insufficient model for effective public engagement.

[REGISTER](#)

[Brookings 12th Annual Municipal Finance Conference.](#)

Tue, July 18 - Wed, July 19 | The Brookings Institution

The annual [Municipal Finance Conference](#) brings together academics, practitioners, issuers, and regulators to discuss recent research on municipal capital markets and state and local fiscal issues. The conference is a joint venture of the Hutchins Center on Fiscal and Monetary Policy at Brookings, the Rosenberg Institute of Global Finance at the Brandeis International Business School, the Olin Business School at Washington University in St. Louis, and the Harris School of Public Policy at the University of Chicago. The 2023 conference will be held primarily in person - there will be livestream options for remote viewers - on July 18 and 19 at Brookings Institution.

[Click here](#) to learn more and to register.

[Orrick Public Finance Webinar Replay: Energy as a Service and Municipal Bonds - What You Should Know](#)

Energy as a Service (EaaS) transactions are a category of innovative delivery model transactions that focus on the design, construction, financing and long-term maintenance and operations of energy assets, central utility plants, and energy efficiency improvements, as well as energy production and distribution. The energy production can be traditional or renewable. This is a mechanism for large-facilities or campus owners to transfer the risk of delivering all of its heating, cooling, water, and energy operational services for a guaranteed level of service and energy savings to an expert that has the singular focus in delivering these types of projects for clients nationally and

internationally.

This presentation focused on EaaS transactions for governmental issuers and nonprofit borrowers of tax-exempt bonds. There are a few types of transactions that are documented and allocate risks differently. The presentation described and compared the common legal or document structures used in the current market. The presentation also addressed a number of legal and practical issues relating to

- various EaaS structures,
- federal tax compliance for existing and future tax-exempt bonds, and
- the manner in which these transactions are treated under existing bond documents.

[Click here to view the webinar.](#)

March.30.2023

[SEC to Host Municipal Securities Disclosure Conference.](#)

Washington D.C., March 31, 2023 — The Securities and Exchange Commission today opened public registration for its Municipal Securities Disclosure Conference, which will be held on **May 10, 2023, at the SEC's headquarters**. The conference, held in a hybrid format with both in-person and virtual participation, will bring together a variety of municipal securities market participants, including issuers and investors, to discuss the state of disclosure in the municipal securities market.

Conference topics will include:

- Voluntary disclosure practices of municipal issuers;
- The impact of the Financial Data Transparency Act on the municipal market;
- ESG practices in the municipal market; and
- Emerging and longstanding issues in the municipal securities market.

SEC Chair Gary Gensler, Commissioners Hester Peirce and Jaime Lizárraga, and staff from the Office of Municipal Securities (OMS), including Director Dave Sanchez, will participate in the conference.

OMS coordinates the SEC's municipal securities oversight activities and administers the Commission's rules pertaining to municipal securities brokers and dealers, municipal advisors, investors in municipal securities, and municipal issuers. OMS advises the Commission on policy matters relating to the municipal securities market and is responsible for policy development, coordination, and implementation of Commission initiatives to improve the municipal securities market. To register for the conference, and to learn more about the municipal securities market and the work of the Office of Municipal Securities, please visit [OMS's webpage](#).

Conference registration is open until May 5, 2023, and is subject to confirmation. For media inquiries regarding the conference, please contact SEC Public Affairs at news@sec.gov. For registration questions, please contact the Office of Municipal Securities at (202) 551-5680 or at municonference2023@sec.gov.

Fiscal First Aid: GFOA Webinar

April 18, 2023 1-4 p.m. ET | April 19, 2023 1-4 p.m. ET

Details:

Fiscal distress can be caused by many factors, but in all cases, the finance officer must act to diagnose the cause, apply treatments, and work to restore fiscal sustainability. Whether your government finds itself in a budget crisis or is working towards preparing for the next recession, GFOA's Fiscal First Aid research series, developed originally to help deal with the 2009 Great Recession and then refined through the pandemic offers several strategies to reduce budget expenses, create flexibility, and assess risk associated with different options with the goal of long-term sustainability. This course provides an overview of GFOA's 12 step approach for addressing fiscal distress and outlines the steps finance officers should take to guide their organizations through times of fiscal uncertainty and budget shortfalls.

Who Will Benefit: CFO/Finance Director, Controller, Budget Manager, Budget Analyst

Learning Objectives:

- Identify the three stages of fiscal recovery
- Identify the twelve steps that make up GFOA's Fiscal First Aid process
- Learn actions local governments can take to prepare for fiscal distress
- Learn how finance officers can take a more collaborative approach to addressing fiscal distress
- Understand how to assess the risks related to different types of Fiscal First Aid treatments and how to mitigate those risks
- Learn strategies for controlling and cutting personnel expenses
- Better integrate procurement practices to help in managing the budget
- Understand the role financial policies can play in addressing fiscal distress

Member Price: \$210.00

Non-member Price: \$420.00

[REGISTER](#)

Developing an RFP for an ERP System: GFOA Webinar

April 11, 2023 | 1 pm - 3 pm ET

Details:

There are few projects that local governments will take on that reach the size, scope, and complexity of an enterprise resource planning (ERP) implementation. Not only do ERP projects touch just about everything and everyone in the organization, they also can represent significant change for an organization. ERP projects are expensive requiring investments not only in dollars, but in time, creating the expectation that governments will see significant improvement in functionality, efficiency of operations, or best practice adoption as a result. Combine this with the fact that many governments only implement an ERP system once every 10-15 years and you can understand how ERP projects can be difficult.

GFOA has experience assisting hundreds of local governments with planning for, procuring, implementing, and assessing ERP systems. Fortunately, for governments planning on taking on an ERP project, many of the risks associated with ERP projects can be mitigated with planning, organized readiness activities, and project leadership. Using a request for proposal (RFP) for engaging the vendor community, encouraging competition, defining scope, and establishing procedures for accountability and risk mitigation is an essential component in the ramp up to an ERP project. However, GFOA also sees many organizations not take full advantage of the RFP process to set their project up for success.

This webinar will present best practices for developing an RFP for an ERP project and discuss how the RFP can be used as both a key milestone in the readiness process and as a guide for future planning. The instructor will present common mistakes you can avoid in developing your RFP and how to give yourself the best opportunity to find a qualified vendor and negotiate the best possible contract to deliver success in your ERP project,

Member Price: \$85.00

Non-member Price: \$160.00

[REGISTER](#)

[Financing Charter Schools Through Bond Finance and P3: CDFA // BNY Mellon Development Finance Webcast Series](#)

May 16, 2023 | 2:00 PM - 3:00 PM Eastern

Educational institutions consistently struggle to keep pace with facility maintenance, and charter schools especially have become innovative in developing capital planning strategies to meet contemporary building needs. During this installment of the CDFA // BNY Mellon Development Finance Webcast Series, presenters will share how charter schools are partnering with private entities to use bond finance and public-private partnership approaches to better provide the facilities needed to support learning outcomes.

[Register Now](#)

[Orrick Post-Issuance Compliance Webinar: 2023 Updates](#)

Webinar | April.04.2023 | 10am - 11am (Pacific Standard Time)

Join BLX and Orrick on April 4, 2023, for insight on recent tax-exempt bond compliance developments from experts in the public finance and municipal bond industry. Items to be discussed include: Washington update, rising interest rates: the implications for arbitrage rebate and the opportunities for investing bond proceeds, and IRS audit of tax-exempt bonds preparedness.

Participating in the webinar will be Ed Oswald from Orrick, Alan Bond, Amy Kron, and Sandee Stallings from BLX and Emily Brock from GFOA.

Make training a regular part of your organization's post-issuance compliance program and join us

for this educational event. CPE and CLE credits will be provided.

CLE Type: CPE and MCLE (pending in California)

CLE Credits Available: Y

[REGISTER](#)

Correctly Calculating Net Investment in Capital Assets: GFOA Webinar

March 13, 2023 | 1 PM - 2 PM ET

Details:

The calculation of net investment in capital assets has proven challenging to many governments because of the wide variety of transactions and other events that must be considered. This class will begin by providing participants with a conceptual understanding of net investment in capital assets as a classification of net position in multiple reporting units presented in financial statements and annual comprehensive financial reports prepared in accordance with generally accepted accounting principles. Then, those concepts will be applied to example facts and circumstances that are faced by preparers of GAAP-based state and local government financial statements.

Learning Objectives:

Those who successfully complete this seminar should be able to identify:

- The role of net investment in capital assets as a component of net position;
- The reporting units for which a net investment in capital assets is calculated;
- Capital vs. noncapital liabilities and deferred resource flows; and
- Frequent missteps in the calculation of net investment in capital assets.

[Click here](#) to learn more and to register.

[Webinar] Full Disclosure - Tips, Tricks and Traps for the Unwary in Navigating Public Finance Disclosure Obligations: Part II - The Financial Data Transparency Act and the Evolution of Financial Disclosures in Public Finance

March 30th, 2:00 pm - 3:00 pm EST

Neal Pandozzi, Andrew Stern

Bowditch & Dewey

The newly-enacted Financial Data Transparency Act (FDTA) has the potential to significantly change the format currently used by issuers and conduit borrowers in submitting financial information to the Municipal Securities Rulemaking Board (MSRB).

How much extra time, resources and money will governmental issuers and conduit borrowers [e.g.,

501(c)(3) corporations] need in order to comply with the new reporting standards? The jury is still out, but the FDTA's impact could be significant.

Join Neal Pandozzi and Andrew Stern from Bowditch's Public Finance team as they offer their insight into the FDTA's requirements, timeline and potential challenges relative to the new financial reporting filing requirements, including:

- Discussion of the FDTA's new financial reporting format
- Operational/technological adjustments to producing financial information in a fully machine-readable and searchable structured format
- Potential for unintended consequences resulting from an extension of these new standards to other financial disclosures beyond audited financial statements
- Considerations for confirming compliance with FDTA requirements relative to new public finance transactions
- Ways in which issuers and conduit borrowers can engage in a meaningful dialogue with respect to the SEC's rule making process

[Register Now](#)

[GFOA's Fundamentals Virtual Forum.](#)

Register now to experience a day in the life of a finance officer.

July 10-14, 2023 | 10 Sessions | A Maximum of 15 CPE Credits

A finance officer needs a broad range of both technical and leadership skills to navigate the complex world of local government finance. Strong financial management requires competencies in **accounting, budgeting, treasury management, procurement, and risk management**, in addition to an ability to communicate, collaborate with others, lead teams, and play a role on a team responsible for building a thriving community. GFOA's 2023 Virtual Forum provides an opportunity for those new to government or those with career aspirations of obtaining a leadership position in the field to experience a day in the life of a finance officer.

Over five days, GFOA will present ten sessions that touch on topics a finance officer would likely face in their role. Each session will leverage GFOA's Financial Foundations Framework, Code of Ethics, and suite of best practices to provide additional resources. Attend this virtual event to discover how you can improve your ability to:

- Manage a team of finance professionals and navigate issues related to hybrid work and DEI
- Prepare a budget for large infrastructure initiatives in the community
- Understand different financing options, including those specifically for ESG projects related to your CIP and how to build that into a long-term financial plan for the organization
- Oversee procurement processes and promote transparency and fairness in evaluating competitive options
- Communicate with department heads about new policies for budget monitoring and tracking results
- Develop an approach to accurately forecast cash flow needs
- Understand how to appropriately account for capital assets
- Guard against risks facing your organization, including impacts of climate change and cyber threats

- Lead recruiting efforts to expand your team
- Communicate financial information to elected officials and external stakeholders

[Click here](#) for FAQs.

[Click here](#) to register.

[Fitch ESG Market Trends 2023 Webinars Series.](#)

Wednesday, February 22

Session 1: 4:30pm HKT/ 8:30am GMT | Session 2: 11:00am EST/ 4:00pm GMT

Challenging macroeconomic conditions, geopolitical tensions and political polarisation are contributing to increased short-term scepticism about the importance of ESG considerations by corporations, investors and governments, but the long-term outlook for sustainable finance remains solid, according Sustainable Fitch's ESG outlook for 2023.

Join Sustainable Fitch's Research analysts on February 22nd as they share their insights on key ESG market trends for 2023 and latest market developments. We will run two sessions to serve the global audience.

The key topics/trends to be discussed will include:

- Economic and political challenges to test ESG's staying power
- Increased focus on climate pledge follow-through and implementation
- Growing physical risks to drive short-term mitigation strategies
- Emerging markets to benefit from focus on nature and climate equity
- Private and retail investors bring new ESG priorities to capital markets

We look forward to your participation to either of the sessions.

[REGISTER NOW](#)

[NFMA 2023 Annual Conference.](#)

The Education Committee of the NFMA is happy to announce the opening of registration for the 2023 Annual Conference!

The NFMA will hold its 2023 Annual Conference at **Disney's Grand Floridian Resort & Spa on May 16 - 19**. In addition to a strong slate of panels, the Conference Planning Committee is excited about invited keynote speakers to be announced shortly.

To view the program, [click here](#). To register, [click here](#).

GFOA eLearning: Federal Funds Fair Begins March 7

The Federal Funds Fair is an opportunity for members and interested finance professionals to learn about federal grants available to state and local governments. Hosted by speakers from federal agencies issuing state and local grants, attendees will get the chance to become familiar with different federal grant programs that could benefit their communities.

[REGISTER](#)

GFOA Advanced Governmental Accounting in Chicago.

Ready for a deep dive into governmental accounting? This in-person training beginning March 21, is designed to provide participants with a solid working knowledge of specialized accounting and financial reporting used by state and local governments for selected topics through lecture, discussion, and exercises.

[REGISTER](#)

GFOA Preconference Seminar Feature: The Importance of Cash Flow Forecasting

GFOA recommends that governments perform ongoing cash forecasting to ensure that they have sufficient cash liquidity to meet disbursement requirements and limit idle cash. However, GFOA research indicates that many governments fail to meet the standards outlined in this best practice. This preconference seminar, Friday, May 19, will provide an overview of cash flow forecasting, discuss how to conduct both simple and complex cash flow analysis, and outline the tools available to help governments with this important task.

[REGISTER](#)

CDEFA Food Systems Finance Webinar Series: Bonds & Food Systems

Tuesday, February 28, 2023 | 2:00 PM - 3:30 PM Eastern

Food system businesses need access to capital at an affordable price, while investors expect a return on their investments. Few financing tools meet both of these needs as well as bonds, a longstanding staple of public development finance that offers flexible, low-cost capital for the borrower and tax-free returns for the investor. During this installment of the CDEFA Food Systems Finance Webinar Series, we take a deeper look at a method of financing that has been building infrastructure, industry, and agriculture for over a century and explore its applications within the food system.

Moderator:

Angela Blatt, Director, Research & Technical Assistance, Council of Development Finance Agencies

Speaker:

Rodney Wendt, Executive Director, Washington Economic Development Finance Authority

[Click here](#) to register.

Governmental Accounting for Non-Accountants: GFOA Webinar

February 15, 2023 | 1 p.m.-3 p.m. ET

Details:

Accounting and financial reporting form an essential component of the informational infrastructure that undergirds state and local government finance. Decisions are only as good as the information that supports them. This training provides an introduction designed to equip participants to better understand state and local government financial reports.

Who Will Benefit: Government professionals with a limited or no background in accounting and financial reporting.

Learning Objectives:

Those completing this seminar will be able to:

- Recognize the role of accounting and financial reporting in the governmental environment.
- Identify the “players” (financial statement users, preparers, auditors)
- Name the “rules of the game” (generally accepted accounting principles - GAAP)
- Identify what fund accounting is and how it works (fund categories and fund types)
- Discern what different funds measure and when they measure it (measurement focus and basis of accounting)
- Recognize the important elements of government-wide financial statements and their relationship to fund financial statements (how does the information differ and why?)
- Ascertain where to look for additional information to help understand the financial statements and how to use that information (annual comprehensive financial report)

Member Price: \$85.00

Non-member Price: \$170.00

[REGISTER](#)

NASBO Spring Meeting.

April 26-28, 2023 | San Diego, California

This meeting focuses on budget strategies and state fiscal conditions and will allow attendees the opportunity to network with colleagues from across the country. Session topics will include:

- Economic Outlook
- State Workforce Initiatives
- Disaster Funding/Recovery
- Stress Testing State Budgets

[Click here](#) to learn more and to register.

GFOA Accounting Academy: An Intensive Introduction

In-Person Training

February 27 - March 2 2023 | 8:30 a.m.-4:30 p.m. PT

**Hyatt Regency Newport Beach 1107 Jamboree Road
Newport Beach, California**

Details:

Accountants and auditors new to the public sector must immediately face the daunting challenge of familiarizing themselves with the highly specialized rules, guidelines, and practices applicable to state and local governments. This intensive four-day workshop, intended for those who already possess at least a basic knowledge of private-sector accounting, combines lecture, discussion, and exercises to help newcomers make this difficult, but essential, transition.

Who Will Benefit: Accountants and auditors new to the public sector

Learning Objectives:

Those who successfully complete this seminar should obtain a solid understanding of each of the following:

- Generally accepted accounting principles (GAAP) for state and local governments
- The unique environmental factors that have led to specialized accounting and financial reporting for state and local governments
- Fund accounting
- Measurement focus and basis of accounting
- How to categorize and measure transactions and events
- Government-wide financial reporting
- Component units
- Budgetary reporting
- Elements of an annual comprehensive financial report

Member Price: \$1197.00

Non-member Price: \$1633.50

[Click here](#) to learn more and to register.

P3 Financing Approaches for Broadband Infrastructure: CDEA // BNY Mellon Webcast

Tuesday, February 21, 2023 | 2:00 PM - 3:00 PM

Rural and low-income communities continue to face challenges financing broadband despite increased investment nationwide to address the connectivity gap. Public-private partnership (P3)

structures are becoming more common as an approach that enables broadband expansion in the places that need it most. During this installment of the CDFA // BNY Mellon Webcast Series, experts will highlight the resources available for financing broadband, discuss navigating the use of P3 for broadband, and share first-hand knowledge of their successes utilizing P3 financing for broadband projects.

[Click here](#) to register.

[Join CDFA and BNY Mellon on January 17 for Forecasting the Bond Market.](#)

Tuesday, January 17, 2023 | 2:00 PM - 3:00 PM

Pandemic recovery, new federal legislation, and increased interest rates have touched all parts of the national economy, including the U.S. municipal bond market. As we enter into 2023, experts will reflect on recent changes in the bond market to forecast the challenges and opportunities ahead. During this installment of the CDFA // BNY Mellon Development Finance Webcast Series, panelists will discuss bond market trends to help investors and communities make informed decisions in the year to come.

[Click here](#) to register.

[Bonding Time DC Update - A Discussion with GFOA on the 2023 Legislative Outlook for Municipal Bonds](#)

The BDA's most recent episode of Bonding Time features a discussion with Emily Brock of the Government Finance Officers Association.

The podcast was led by Brett Bolton of the BDA and covers:

- Current Status of the Omnibus budget and potential impacts to direct-pay bonds
- Amended Version of the Financial Data Transparency Act and its Impact on Issuers
- The Potential for Tax Legislation in the Lame Duck Session of Congress
- 2023 Legislative Outlook

[Listen to podcast.](#)

Bond Dealers of America

December 21, 2022

[New GFOA Federal Funds Training Scheduled for January.](#)

Attend this eLearning event **January 9 and 13** to gain a basic understanding of the Federal grants process for state and local governments and applicable GFOA Best Practices. This course will include current Federal grant programs such as American Rescue Plan Act funding and ongoing

programs such as Community Development Block Grants.

[Click here](#) to learn more and to register.

[GFOA Annual Conference - 2023](#)

Portland, here we come! Registration is open for #GFOA2023 in Portland Oregon, **May 21-24**, at the Oregon Convention Center. Don't miss this opportunity to interact with the largest gathering of government finance officers across North America. This year's conference will feature CPE-accredited sessions that address current issues facing government finance officers and communities, inspiring keynotes, interactive discussions and networking groups with your peers. Register now to take advantage of the early pricing discount. We can't wait to see you in Portland.

[Click here](#) to learn more and to register.

[The Numbers Don't Lie: Challenges with the Property Tax - GFOA Webinar](#)

December 7, 2022 - 3 p.m.-4 p.m. ET

Details:

Property tax is the most important source of revenue for local governments. Given that local governments are defined by their geographical boundaries, their property tax revenues are a function of the value of the land within their jurisdiction, and how it is used. Local governments need to take a closer look at how the land in their community is valued and if they are optimizing land usage so that property tax revenues align with the costs of development.

Local assessors are charged with determining the accuracy and fairness of a community's property tax. Property taxes are often regressive with lower priced properties assessed at a higher value relative to their sale price than more highly valued homes. This means that lower value properties bear a disproportionate burden on the owners of lower value homes. This webinar will explore potential explanations for this pattern as well as possible policy solutions. It will also delve into how local governments can rethink their current land usage patterns, especially ways in which land use planning and finances can be used to boost the revenue productivity of the tax base. Please join us to hear from Chris Berry about issues with the way property tax assessments create persistent inequities, as well as from Joe Minicozzi about the underlying structural problems in the way local governments align land usage and their revenue needs.

Learning Objectives:

Understand how land value assessments can impact the fairness and accuracy of property valuations and taxes

Explore an economic financial analysis of how the pricing structure works how this creates inherent inequities

Gain an understanding of how land usage patterns impact property tax revenue generation and how they can be improved

[Click here](#) to learn more and to register.

Implementation and Variations to Lease Contracts: GFOA Webinar

December 12, 2022 - 1 p.m.-3 p.m. ET

Details:

This webinar will focus on the accounting and financial reporting for the implementation and variations to lease contracts under Governmental Accounting Standards Board (GASB) Statement No. 87, Leases. We will walk through two examples of lease contracts and discuss the calculations and financial reporting for each variation.

Learning Objectives:

Those who successfully complete this seminar should be able to calculate the lease assets and liabilities, and prepare the required journal entries to record the following, from the point of view of lessee and lessor governments:

- Contracts with multiple components, including variable payments
- Preexisting leases upon implementation of GASB 87

[Click here](#) to learn more and to register.

Orrick: Hot Topics and Best Practices for Tax-Exempt Bonds Financing Affordable and Workforce Rental Housing in Oregon

Webinar | December.07.2022 | 2:00pm - 3:30pm (Pacific Standard Time)

Webinar topics will include both federal tax matters, including related party issues, conversion extensions, reissuances, and post issuance compliance, and Oregon law issues, including first-lien and priority requirements, affordability covenants and considerations in combining tax-exempt bonds and public gap-funding sources.

We will also discuss Oregon's projected private activity bond volume cap short-fall, OHCS's priorities for volume cap awards and opportunities to utilize tax-exempt 501(c)(3) bonds to finance projects. The presentation will include a panel discussion, as well as a chance for participants to submit questions.

Speakers:

- Alexandra Bartos-O'Neil
- Angie Gardner
- Raiko Kaneshige-Green
- Barbara League
- Michael Schrader
- Steven White

For more information, please contact Sharlene Alim or Annie Schmaeling.

[REGISTER](#)

Fitch Ratings Credit Outlook North America 2023.

Wednesday January 18, 2023 | 9:00am - 12:00pm EST

Please join us for our Virtual North America Credit Outlook Conference.

Credit markets today are at a crossroads, as inflation, geopolitical tensions, slowing economies and more contribute to ongoing rate increases, supply chain disruptions and energy shortages - challenging both sovereigns and corporates.

What should we expect for 2023, and how will global markets contend with pressure on demand and costs, vulnerable property markets, fluctuating commodity prices and diminishing financial profile strength?

Register now to secure your place! Additional sector outlook webinars will be announced shortly.

Please contact claire.kelly@thefitchgroup.com with questions.

[REGISTER NOW](#)

The Root of Local Government Revenue: GFOA Webinar

November 21, 2022 | 2 p.m.-3 p.m. ET

Local governments are defined by their geographic boundaries. Property taxes are a function of the assessed value of the land within the jurisdiction. Sales tax revenues are often partially determined by how many and the types of merchants in the jurisdiction. Often, when considering a new development, the primary concerns are remaining in compliance with laws, administering building codes, meeting demand for new development, in addition fulfilling mobility, parking and greenway goals. However, many governments do not fully explore the connection between their land use choices and the long-term financial health of their locality from a revenue or cost perspective. Property tax revenue is typically not structured to cover ongoing capital costs which creates an unsustainable funding structure. As a result, many local governments have difficulties funding infrastructure maintenance and replacement.

In this webinar we will explore this relationship by examining some of the key components to creating more fiscally productive and sustainable land use patterns. This begins with rethinking current revenue structures prior to new development by analyzing available data. We will offer some ways to more effectively manage land uses for positive revenue impacts. Please join us to hear from Joe Minicozzi about the geospatial implications of different revenue streams by examining local tax and land use policies. We will learn how these concepts have been applied from Justin Weiss in Fate, TX and how they created a sustainable growth solution by developing their own simple fiscal calculator to assess new developments.

[Click here](#) to learn more and to register.

[Art of Budget Communications: GFOA eLearning Course](#)

November 28, 29 & 30, 2022 | Noon-3 p.m. ET

Communication is essential for developing a local government's budget. Planning, strategizing, and negotiating are some of the most important skills that a finance officer must employ to develop and manage a budget effectively, and good communication is at the core of mastering these skills. Throughout the budget process, finance officers are responsible for communicating complex financial and programmatic information to many different stakeholder groups, including executive managers, elected officials, employees, advocates, and constituents. The reasons you communicate with each of these groups can differ, and each group's understanding of the nuances of local government finance can vary as well. This course will give you the knowledge to help you determine what and how to communicate to each group. We will explore the pros and cons of different communication tools. The course will also address public engagement and explain how the typical budget hearing is an insufficient model for effective public engagement.

Please note that this course will include lecture and small group discussions. Course attendees are strongly encouraged to have a microphone and web camera enabled in order to fully participate in the course.

[Click here](#) to learn more and to register.

[CSMA Fall Conference.](#)

Wednesday, November 30, 2022 5:30 PM to Friday, December 02, 2022 11:00 AM PST

Registration is now open for the CSMA Fall Conference! The event will take place from Wednesday, November 30th to Friday December 2nd at Silverado Resort and Spa in Napa, California.

[Click here](#) for the program, which includes the link for hotel reservations. [Click here](#) to register.

[Alliance for Excellence in School Budgeting Fall Meeting.](#)

Maximizing ARP/ESSER federal funding is a big topic among school districts. How are you spending the money? What challenges do you face? Attend this year's Alliance for Excellence in School Budgeting annual meeting **December 1-2**, in Chicago, Illinois, to discuss more. This year's meeting will also cover best practices in school budgeting, better communication with stakeholders, developing robust goals and strategies, and more.

[REGISTER](#)

[Best Practices and Strategies for Public Investing: GFOA Webinar](#)

November 15, 16 & 17 2022 | 1-3:45 p.m. ET

Details:

This course offers attendees a comprehensive agenda of the concepts and techniques needed to effectively manage their investment portfolios. This two-day course highlights the importance for governmental entities to have a robust investment policy and corresponding procedures, and brings attention to GFOA's best practices related to investing. Through interactive activities and classroom presentations, attendees will gain a better understanding of the various elements of an investment program, whether the portfolio is managed internally or externally. Topics covered include: cash flow forecasting, hiring and managing external professionals, types of investments commonly used in the public sector, investment strategies for liquidity and core investment funds, managing risks, benchmarking, and reporting.

Who Will Benefit: CFO/Finance Director, Treasurer

Learning Objectives:

- Those who successfully complete this seminar should be able to:
- Understand key components of an investment policy
- Develop an approach to cash flow forecasting and understand how that leads to investment decisions
- Understand key factors in hiring and managing external investment professionals
- Learn how to use tools to raise awareness of and develop tools to manage various risks related to investing
- Approach the multifaceted segments of investment strategies
- Choose the right benchmarking standard for your portfolios

Member Price: \$315.00

Non-member Price: \$630.00

[REGISTER](#)

[Bond Buyer Web Seminar: The Role of Munis in the Future of Cities](#)

Tuesday, November 29, 2023 | 3:00 p.m. ET / 12:00 p.m. PT | 45 Minutes

As three-quarters of the infrastructure built in the U.S. is funded by state and local governments and the municipal bond market they tap to finance it, there are long-term headwinds challenging its future, including macroeconomic issues, the rise in the work-from-home environment and climate change.

Join The Bond Buyer's executive editor, Kyle Glazier, and Arizent's senior industry analyst, Michael Moeser, for an exclusive VIP member discussion on how cities and towns are being affected by policy decisions in a national infrastructure plan, climate change and the biggest challenges facing the industry in 2023 and over the next five years.

Gain perspective on these key questions:

- How many leaders in the municipal bond industry, including issuers and ratings agencies, believe

that state and local government tax revenues will be negatively affected by the macroeconomic recession concerns overhanging the U.S. economy, which could impact the ability of cities and states to pursue infrastructure investments?

- What impact do leaders believe the Infrastructure Investment and Jobs Act (IIJA) will have on the public finance landscape? And, how will it affect the growth of public-private partnerships in public finance over the next five years?
- What role does climate change play in project planning and decision making when it comes to infrastructure going forward?
- What are the top challenges leaders see facing governments and businesses in 2023?

[REGISTER NOW](#)

CDFA // BNY Mellon Development Finance Webcast Series: Funding Childcare Facilities

November 15, 2022 | 2:00 PM - 3:00 PM

Funding Childcare Facilities

Many low and middle-income communities have a challenging time when it comes to accessing affordable childcare. However, there are a growing number of finance programs available for childcare facilities around the country and a variety of development finance tools that can be used to help alleviate this issue. During this installment of the CDFA// BNY Mellon Development Finance Webcast Series, presenters will look across the development finance spectrum for ways to invest in childcare facilities with tools like bonds, RLFs, tax credits, and more. Experts will also highlight various case studies that have successfully utilized these tools.

Moderator(s)

Oreste Casciaro, Vice President | Relationship Management, The Bank of New York Mellon

Speaker(s)

Surabhi Dabir, Senior Advisor, Community Facilities, U.S. Department of Agriculture
Cindy Larson, National Program Director, Child Care & Early Education, Local Initiatives Support Corporation

[Register here.](#)

Orrick Public Finance Webinar: Public Finance Bank Lending and Direct Purchases

Online Webinar | November.09.2022 | 11am - 12pm (Pacific Standard Time)

This webinar will cover various topics related to bank lending to and direct purchases of debt obligations issued by governmental entities and nonprofit corporations. The topics include:

- Special limitations and issues such as type of debt, collateral and provisions when lending to a governmental entity
- Issues related to tax-exempt lending to nonprofit corporations

- Differences between direct purchases of obligations vs. publicly offered obligations
- Issues unique to banks

[Register](#)

[GFOA Virtual Summit: Make Rethinking Public Engagement a Priority](#)

Local governments should do better at engaging citizens in the budget process. The Rethinking Public Engagement Summit, **November 7-10**, will explore design principles for improving engagement and foster an exchange of ideas from speakers across the country.

[REGISTER](#)

[CDFA // BNY Mellon Development Finance Webcast Series: Financing Tools to Invest in Clean Energy](#)

Tuesday, October 18, 2022 | 2:00 PM - 3:00 PM Eastern

Investing in clean energy is a critical component of building a sustainable economy and results in a wide range of benefits: increased grid reliability, lower long-term energy costs, better air quality, job opportunities, and more. Many financing tools are available for state, local, and tribal governments to develop clean energy strategies and achieve environmental goals. During this installment of the CDFA // BNY Mellon Development Finance Webcast Series, experts will provide an overview of the resources and financing tools – such as PACE financing, green bonds, and energy tax credits – that can help communities seize the benefits of investing in clean energy.

[Register Now](#)

[Convening a Coalition to Rethink Public Engagement: GFOA Summit](#)

Local governments should do better at engaging citizens in the budget process. The Rethinking Public Engagement Summit, November 7-10, will explore design principles for improving engagement and foster an exchange of ideas from speakers across the country.

[REGISTER](#)

[Prospects for the Sales, Hotel, and Lodging Taxes: GFOA Webinar](#)

October 7, 2022 | 2 pm - 3 pm ET

The COVID-19 pandemic has significantly impacted local tax revenues in a number of ways. Reduced consumption of goods and services has led to a decline in sales taxes in many areas, which often

represents a sizable proportion of local government revenues. Additionally, hotels are experiencing more vacancies than ever which means less hotel and lodging taxes. Many economists argue these are temporary changes and both economies should mostly rebound in the near future, but it presents a difficult conundrum to local governments in the interim. In this webinar you'll learn various approaches to weathering the current dip in sales and hotel taxes and how to be better prepared for similar future economic downturns.

[Click here](#) to learn more and to register.

[The Financial Data Transparency Act: What GFOA Members Need to Know - Podcast](#)

Currently, U.S. Senators are considering including the bill (S. 4295) as part of the federal defense authorization legislation that must be taken up before the end of the year. GFOA has long advocated for governments to demonstrate transparency and accountability by making financial information readily accessible to the public, but hastily passing this bill may create data standards that opens the door to directing the use of specific technologies for reporting governmental financial information.

[LISTEN](#)

[NFMA Introduction to Municipal Bond Credit Analysis](#)

The NFMA will once again offer its Introduction to Municipal Bond Credit Analysis in person!

This year's course will be held at the Sofitel Chicago on **November 17 & 18**.

To view the program, [click here](#). To register, [click here](#).

[NFMA Advanced Seminar on Public Power.](#)

The NFMA will hold an Advanced Seminar on Public Power in Denver, the home of its newest society, MARMOT, on **November 3 & 4**. To view the program, [click here](#). To register for this event, [click here](#).

[CDFA Infrastructure Finance Learning Series: Reviewing the Guidance](#)

Tuesday, October 4, 2022 1:00 PM - 4:00 PM Eastern

Experts will join this session to provide a detailed review of the recently released guidance on the Infrastructure Investment and Jobs Act. Presentations will cover the steps to apply and provide an overall timeline for when communities can expect to access funding. Presentations will also take a closer look at the top five funding categories to see how dollars are beginning to flow to these

project areas. This session will continue the discussion around the utilization of IJFA funds in coordination with local funding through bond finance, tax credit programs, tax increment financing, and other development finance approaches to cover long-term project costs.

[Click here](#) to learn more and to register.

CDFA // BNY Mellon Development Finance Webcast Series: Financing Tools to Invest in Clean Energy

Tuesday, October 18, 2022 2:00 PM - 3:00 PM Eastern

Investing in clean energy is a critical component of building a sustainable economy and results in a wide range of benefits: increased grid reliability, lower long-term energy costs, better air quality, job opportunities, and more. Many financing tools are available for state, local, and tribal governments to develop clean energy strategies and achieve environmental goals. During this installment of the CDFA // BNY Mellon Development Finance Webcast Series, experts will provide an overview of the resources and financing tools – such as PACE financing, green bonds, and energy tax credits – that can help communities seize the benefits of investing in clean energy.

[Click here](#) to learn more and to register.

Fundamentals of Local Government Budgeting: GFOA eLearning Course

- **October 13, 2022 | 1-3:30 p.m. ET**
- **October 14, 2022 | 1-3:30 p.m. ET**
- **October 17, 2022 | 1-3 p.m. ET**
- **October 19, 2022 | 1-3:30 p.m. ET**
- **October 21, 2022 | 1-3:30 p.m. ET**
- **October 24, 2022 | 1-3 p.m. ET**

Details:

As finance officers deal with financial challenges related to the COVID-19 recession and participate in broader conversations on the role of government and its ability to provide services equitably, a local government's ability to budget will be critically important. This virtual training will emphasize the fundamental components of a local government's budget policies and processes along with best practices and techniques required for effective budgeting. Each training module/day will focus on a specific topic and feature both presentation and interactive discussion/exercises. Attendees will go through the basic structures of a local government budget, learn how budgeting can be better used to promote long-term planning, process improvement, and community outcomes. In addition, the course will cover specific techniques for developing the budget, communicating budget messages, and identifying strategies for approaching cut back budgeting to deal with the current crisis.

Who Will Benefit: Finance and budget professionals desiring to learn budget fundamentals in light of COVID-19

Learning Objectives

Those who successfully complete this seminar should be able to:

- Learn the basic structure of a government budget (i.e., funds, departments, accounts, programs, projects, etc.) and how budgeting principles relate to accounting and financial reporting
- Understand why budgeting is important and the connection to long-term planning and performance management
- Learn how to perform basic revenue and expenditure analysis
- Understand the various methods local governments use to develop a budget
- Learn techniques for personnel budgeting and capital budgeting
- Identify strategies for public engagement
- Develop strategies for effective communication and presentation of the budget
- Identify methods to monitor and evaluate budgetary performance
- Learn about GFOA's Fiscal First Aid techniques and how to balance the budget in a recession

Member Price: \$490.00

Non-member Price: \$980.00

[Click here](#) to learn more and to register.

CDFA Ohio Financing Roundtable.

September 14, 2022 | Columbus, OH

We are excited to bring back the CDFA Ohio Financing Roundtable on September 14, 2022! During this special one-day conference, we will share knowledge of best practices within the state's development finance industry. This event will feature economic development finance experts from around the state discussing the latest and most innovative development finance tools, authorities, resources, and approaches, and how these can affect the Ohio economy going forward. After what seems like an eternity apart, we are ready to get back together in-person for the networking opportunities we have all been missing. Space is limited, so be sure to register soon and grab your seat at the roundtable. See you there!

[Click here](#) to learn more and to register.

BDA National Fixed Income Conference.

Charlotte, NC | Nov. 3-4, 2022

Featured Topics

- Regulation of the US Bond Markets – The Agendas at FINRA and the MSRB, A Fireside Chat with Robert Cook of FINRA and Mark Kim of MSRB
- Mid-Term Elections and the Potential Impact on the Bond Market
- ESG, Climate Disclosure, and the Impact on the Muni Market
- Secondary Market Pricing, Evaluations, and Best Execution
- Covid and the Hybrid Workforce – The Challenges and the Opportunities for Sell-Side Dealers
- Blockchain and the US Bond Markets – a Revolution in Waiting?

- New Liquidity Providers – Market Structure Impact

Click over to the [Agenda](#) for more information!

[Click here](#) to register.

[CDFA Update: The Inflation Reduction Act - What You Need to Know](#)

Wednesday, August 31, 2022 | 4:00 PM - 5:00 PM Eastern

Recently, President Biden signed the Inflation Reduction Act of 2022, historic legislation that appropriates billions of dollars for federal loan and grant programs to fight climate change by investing in green resources. Join CDFA and special guest speakers on Wednesday, August 31, from 4:00-5:00 PM, as they discuss how the Act will impact you and the communities you serve!

[Click here](#) to learn more and to register.

[Disclosure Update: GFOA Webinar](#)

September 23, 2022 | 1-3 p.m. ET

Issuers of municipal securities have numerous disclosure responsibilities related to their bond transactions. This includes mandated filings of annual financial information and material event notices in the MSRB's EMMA system, and other types of voluntary disclosures. Industry experts will discuss these issues as well as recent SEC activities related to disclosure. A review of GFOA's best practices and the importance of developing and maintaining disclosure policies and procedures will also be addressed.

[Click here](#) to learn more and to register.

[2022 California Economic Summit.](#)

The 2022 California Economic Summit is coming to Bakersfield on **October 27-28**.

The Summit's bipartisan network of business, equity, environmental and civic organizations is unique in championing solutions that meet the triple bottom line — balancing equity, environmental sustainability and economic growth.

THE EVENT

Produced by California Forward in partnership with the California Stewardship Network, the Summit influences CA FWD's ongoing movement to make the government and economy work for everyone. The two-day Summit is designed to create a shared economic agenda known as the Roadmap to Shared Prosperity and strengthen the Summit network, setting the stage for collective action in 2023.

OCTOBER 27, 2022

Interactive in-person plenary and work group sessions to advance Summit goals — along with receptions, regional tours and artistic performances

OCTOBER 28, 2022

Dynamic plenary sessions featuring keynote speakers, state policy leaders, regional business and civic leaders on critical issues facing California

[Click here](#) to learn more and to register.

CDFA Federal Financing Webinar Series: Funding Community Energy Needs with the Department of Energy.

Tuesday, August 23, 2022 - 2:00 PM - 3:30 PM Eastern

The CDFA Federal Financing Webinar Series is an exclusive, six-part online offering that will convene finance experts from several federal agencies to discuss the variety of federal programs available to restore local economies, preserve small businesses, invest in our communities, and protect our environment.

In the last year, two major pieces of legislation have changed the federal funding landscape with new programs being created through the American Rescue Plan and the Investment in Infrastructure Jobs Act. During each webinar, CDFA will feature timely and in-depth conversations with federal financing experts discussing new programs, updates to existing programs, and the latest strategies for applying and deploying funding. Representatives from various agencies, including DOC, EDA, NIST, HUD, EPA, DOE, USDA, Treasury, and SBA will join us for these discussions.

This series complements the information featured in the CDFA Federal Financing Clearinghouse, provides an in-depth discussion about key federal programs, and offers new and innovative ideas for how communities can utilize federal financing programs. As new programs emerge, they will be highlighted throughout the series.

CDFA maintains strong relationships with federal agencies, giving attendees unprecedented access to the inner-workings of the government's economic development finance activities. We leverage these relationships to offer insider access to the newest initiatives from every agency and help communities prepare for funding and submit applications.

To participate, register for a single webinar or the entire series, and CDFA will send you reminders for each webinar as they are hosted. All webinars will be recorded and presentation materials will be shared with the attendees for long-term viewing.

[Click here](#) to learn more and to register.

CDFA Ohio Financing Roundtable.

September 14, 2022 - Columbus, OH

We are excited to bring back the CDFA Ohio Financing Roundtable on September 14, 2022! During this special one-day conference, we will share knowledge of best practices within the state's development finance industry. This event will feature economic development finance experts from around the state discussing the latest and most innovative development finance tools, authorities, resources, and approaches, and how these can affect the Ohio economy going forward. After what seems like an eternity apart, we are ready to get back together in-person for the networking opportunities we have all been missing. Space is limited, so be sure to register soon and grab your seat at the roundtable. See you there!

[Click here](#) to learn more and to register.

CDFA Advanced Tax Credit Finance WebCourse.

September 21-22, 2022 | Daily: 12:00 - 5:00 PM Eastern

Overview

The Advanced Tax Credit Course will take a deeper dive into the use and applicability of tax credits. Building on the basic structure of tax credits covered in the Intro to Tax Credit Course expert speakers will discuss details of New Markets Tax Credits (NMTC) and Low- Income Housing Tax Credits (LIHTC) through the lens of all parties and how they come together on a given transaction. Case studies will be presented to illustrate on how tax credits work with other economic development tools such as bonds or loans.

This course will qualify for the CDFA Training Institute's Development Finance Certified Professional (DFCP) Program. Join us online, and start down the road to personal and professional advancement today.

[Click here](#) to learn more and to register.

Treasury Management Best Practices: GFOA Webinar

August 10, 11 & 13 2022 | 1 - 3:45 p.m. ET

Details:

This course, focuses on GFOA's best practices in treasury management. Participants will be able to understand the importance of governments developing and having policies and procedures related to their cash management duties. This includes discussions on the payables and receivables functions, cash flow forecasting, banking services and fraud prevention. Attendees will be able to learn not only from the GFOA best practices and resources, but also the presentation of case studies, and interactions with course leaders and other participants.

Learning Objectives:

Become familiar with key practices related to treasury management
Lay the groundwork for developing their own appropriate policies and procedures for payables and receivables
Understand policies and procedures for determining and procuring banking services
Determine key internal controls policies necessary for fraud prevention in the Treasury office

Member Price: \$315.00

Non-member Price: \$630.00

[Click here](#) to learn more and to register.

Preparing for Federal Grant Applications: CDFA Webinar

August 9, 2022 | 1:00 PM - 3:00 PM

Applying for federal grants is a competitive process that requires a significant amount of time and planning prior to submission. It is essential for applicants to know how to navigate the available funding sources and prepare the necessary information to apply well in advance. This session will provide guidance and best practices on the various components of a federal grant application. This includes project planning and timeline development, budgeting, establishing partnerships, and conducting the background research and assessments necessary to justify the investment.

Presentations will cover what goes into the market and feasibility studies needed to assess potential outcomes of a specific infrastructure project, as well as different approaches to infrastructure analysis and financial modeling. The panel will also discuss how to identify other sources of funding to align with federal dollars, building on the previous sessions that review the development finance tools available for supporting infrastructure. As the IJA encourages regional collaboration, speakers will touch on the role of key partners in the application process throughout the discussion and share how advisory services can assist in preparing for funding.

[Click here](#) to learn more and to register.

Intermediate Governmental Accounting: GFOA In-Person Training

July 26 & July 27, 2022 | 1-4:30 p.m. CT

Prerequisite: Attendance of GFOA's Accounting Academy, Government Accounting Intensive Series, an equivalent prog

Details: This seminar is designed to provide participants with a solid working knowledge of the specialized accounting and financial reporting used by state and local governments for selected topics.

Learning Objectives:

Those who successfully complete this series should gain a basic understanding of the appropriate governmental accounting and financial reporting related to:

- Capital assets
- Debt
- Leases
- Public-private and public-public partnerships
- Availability payment arrangements
- Subscription-based information technology arrangements

Member Price: \$525.00

Non-member Price: \$740.00

[REGISTER](#)

Development Finance and the Cannabis Industry: CDFA Webinar

Tuesday, July 19, 2022. | Tue 2:00 PM - 3:00 PM

Across the country, 18 states have legalized recreational marijuana, and this list is expected to continue growing in the years to come. As the cannabis industry expands, there is significant opportunity for the development finance sector to play a role in financing the production and processing infrastructure, dispensary facilities, and overall business development.

During this installment of the CDFA // BNY Mellon Development Finance Webcast Series, we will explore the creative financing approaches that are providing capital to the emerging cannabis industry, and the economic benefits to states that have legalized the sale of recreational and medical marijuana.

[Click here](#) to learn more and to register.

BLX/Orrick 2022 Post-Issuance Compliance Workshop - Hybrid Event (NEW!)

Nov 3-4, 2022

A Comprehensive Overview of Post-Issuance Tax Law and SEC Secondary Market Disclosure for 501(c)(3) Organizations and State and Local Government Issuers Who Utilize Tax-Exempt Financing

The 2022 Workshop will again be a hybrid event, with in-person attendance at the Virgin Hotels Nashville and a livestream option. In-person attendance will be limited to 50 attendees, subject to the COVID-19 health protocols detailed below. In addition, through the livestream option, we will make available all content on a virtual platform with the ability for participants to interact with the presenters throughout the workshop. Both the in-person and livestream options will allow participants to replay any of the sessions for up to 30 days after the event.

Our desire is to host an event for the community that provides timely and relevant information while following recommended protocols and that is safe for both the attendees and for our team. The livestream option represents an exciting way for us to bring our content to a much broader audience.

[Click here](#) to learn more and to register.

The Health System's New Imperative: Market Demands for Climate Risk and Emissions Management - BLX/Orrick Webinar

July 28, 2022 at 10 am PT / 1 pm ET

As the SEC, rating agencies, and investors turn their attention to ESG factors, shifting market expectations are creating new challenges and opportunities for healthcare systems. Join BLX, Orrick, and Healthcare Climate ActionWorks on July 28th for an interactive discussion on the evolving ESG landscape and its impact on the healthcare sector and health system leadership. Featuring legal, public finance, and climate strategy experts, this webinar will cover:

- The regulatory environment and market demands for climate risk and greenhouse gas emissions reporting
- Climate strategies and financial opportunities for health systems
- Fundamentals of emissions reduction planning specific to hospital-based health systems
- A unique tool for rapidly eliminating electrical source emissions

CPE and CLE credits will be available. For detailed information and to register, [CLICK HERE](#).

Revenue Policies: GFOA Webinar

July 18-20 2022 | 1-3:45 p.m. ET

When we talk about developing a budget that supports a thriving community, we often spend most of our time and energy thinking about the expenditure side of the equation: what are the local government's priorities and goals and how much is it going to spend to achieve those goals? The revenue side of the equation is just as important to building a strong financial foundation that supports a thriving community, though. In this course, learn how to evaluate your local government's revenue portfolio using the five pillars of the Financial Foundations Framework.

Please note that this course is **not** focused on the technical aspects of forecasting revenue.

Learning Objectives:

- Identify the five pillars of the Financial Foundations Framework
- Understand how developing and implementing fair revenue policies contributes to a thriving community and better trust in government
- Learn how to build a more resilient and more diverse revenue portfolio
- Learn the essential components of effective revenue policies
- Learn how to evaluate your revenue sources
- Learn innovative approaches to enhancing existing sources of revenue and developing new sources of revenue

Member Price: \$315.00

Non-member Price: \$630.00

[REGISTER](#)

GFOA's Fundamentals Virtual Forum.

GFOA's First Annual [Fundamentals Virtual Forum](#) will be held **July 11-15, 2022**. This virtual training opportunity is designed for new government finance staff who are either starting their career journey or transitioning to public finance from the private sector. Seven of the ten [virtual forum sessions](#) will be based on topics from GFOA's Certified Public Finance Officers (CPFO) program, which is recognized throughout the industry as a major foundational component in the success of future leaders in government finance.

Member Price: \$149.00

Non-member Price: \$249.00

[REGISTER](#)

Brookings 11th Annual Municipal Finance Conference.

The annual [Municipal Finance Conference](#) brings together academics, practitioners, issuers, and regulators to discuss recent research on municipal capital markets and state and local fiscal issues. The conference is a joint venture of the Hutchins Center on Fiscal and Monetary Policy at Brookings, the Rosenberg Institute of Global Finance at the Brandeis International Business School, the Olin Business School at Washington University in St. Louis, and the Harris School of Public Policy at the University of Chicago.

The 2022 conference will be held **virtually** across three days and will be open to the public free of charge:

- **Monday, July 18:** COVID's impact on the state and local sector; the G (governance) in ESG;
- **Tuesday, July 19:** Recent developments in the muni bond market
- **Wednesday, July 20:** The S (social) and E (environmental) in ESG

[Click here](#) to learn more and to register.

Budget Document Basics: GFOA eLearning Course

July 6, 7 & 8, 2022 - Noon-2 ET

Details:

Most, if not all, local governments produce a budget document every year as one of the final steps in their budget process, but do they know who is reading it and what they think of it? This course will encourage finance and budget staff to think critically about why their local government publishes a budget document and what they are communicating so that they can produce a document that is more useful for both internal and external stakeholders. By pointing out some of the limitations of

the budget document as a communications tool, the course will also encourage attendees to think about how their organization's budget document fits in with its broader budget communications strategy and how to develop other means of communication to complement the budget document.

Please note that this course is not focused on how to win the GFOA Distinguished Budget Presentation Award. Instructors may touch on the criteria for the Budget Award, but it will not be a major focus of the presentation.

[Click here](#) to learn more and to register.

NABL 201 LIVE Webinar Series: Arbitrage and Rebate

Tuesday, June 28, 2022 | 1:00pm - 2:30pm ET

Join us for an educational presentation of the latest practical application of yield restriction and arbitrage rebate rules. Be sure to register by **10:00am ET on Tuesday, June 28, 2022**, and participate in a discussion of post-issuance considerations and rebate computations.

Expert speakers will present key findings, trends, and themes that explore highly detailed topics including:

- Calculations/The Basics
- Temporary Periods, Reserve Funds, and Spending Exceptions
- Elections, Allocations, and Waivers

[Click here](#) to register.

Save The Date: NABL Arbitrage and Rebate Live Webinar!

Date: June 28, 2022, 1:00pm - 2:30pm ET

NABL is hosting a "201 Webinar Series" on Arbitrage and Rebate covering a variety of major topics during the live discussion including:

- Calculations/The Basics
- Temporary Periods, Reserve Funds, and Spending Exceptions
- Elections, Allocations, and Waivers

Participants will hear the latest regarding the practical application of yield restriction and arbitrage rebate rules. You'll gain insights about strategies to reduce rebate liability in an arbitrage positive environment. This is a great opportunity to hear about at-issuance considerations issuers should consider when making arbitrage elections and investment decisions. For the interactive part of the webinar, participate in a discussion of post-issuance considerations and rebate computations.

Registration will open next week; stay tuned for the email and information about the esteemed panelists.

[Announcing GFOA's First Annual Fundamentals Virtual Forum.](#)

GFOA's First Annual Fundamentals Virtual Forum will be held **July 11-15, 2022**. This virtual training opportunity is designed for new government finance staff who are either starting their career journey or transitioning to public finance from the private sector. Seven of the ten virtual forum sessions will be based on topics from GFOA's Certified Public Finance Officers (CPFO) program.

[LEARN MORE](#)

[\[Members-Only Discussion\] Down the Due Diligence Rabbit Hole on 5/18](#)

Join us for a panel discussion on NABL's 2022 report on Due Diligence in Primary Offerings on **Wednesday, May 18, 2022, 3:00pm-4:00pm ET / 12:00am - 1:00pm PT.**

"Due Diligence Considerations in Primary Offerings of Municipal Securities", published in January of this year, provides NABL members with tools for consideration when undertaking due diligence reviews for issuer and underwriter clients in connection with primary offerings of municipal securities, and, after establishing a working definition of due diligence, covers why, when, where, and how due diligence is undertaken. Panelists will walk through the Report and provide insight surrounding due diligence reviews, including lessons learned and "war stories" from deals gone awry.

Register by May 18, 2022 at 10:00am ET to join. The roundtable discussion is geared toward junior bond practitioners, and NABL invites attendees of its recent Essentials conference to come prepared with any burning questions left unanswered from the seminar in Denver. This session is a NABL-member benefit and not eligible for continuing legal education (CLE).

[Click here](#) to register.

[GFOA Webinar: Basic Accounting and Financial Reporting for Leases](#)

May 4, 2022 | Noon-2 p.m. ET

Details:

This seminar will focus on the basic accounting and financial reporting for leases under Governmental Accounting Standards Board (GASB) Statement No. 87, Leases. It is designed to provide participants with a solid working knowledge of the accounting for contracts that convey control of the right to use the service capacity of another entity's nonfinancial asset(s), and ways in which to identify key contract provisions, including the lease term and the discount rate.

[Click here](#) to learn more and to register.

CDEA TV Finance Toolbox Series.

With a growing national focus on infrastructure financing, communities throughout the country are actively searching for innovative strategies and solutions for building transportation, energy, water, broadband, and resiliency infrastructure. CDFA is honored to partner with Frost Brown Todd LLC and its affiliate FBT Project Finance Advisors LLC to present the Infrastructure Finance Series. This in-depth series focuses on the characteristics of infrastructure, the innovative tools for financing various infrastructure projects, and how the private sector impacts the landscape of infrastructure investment.

Frost Brown Todd LLC is a full-service law firm dedicated to refining the art of client service, by leveraging technical, industry, and legal knowledge and hands-on experience to serve a diverse client base. Its affiliate FBT Project Finance Advisors LLC is a registered municipal advisor focusing on development finance. Counseling clients from the earliest stages of each project through financing, construction, and project administration, FBT Project Finance Advisors works with clients to develop solutions that fit their community's needs, protect their balance sheet, and deliver bottom-line results.

The series includes:

- Unlocking Capital for Infrastructure Projects
- Transportation Finance Strategies
- Water Finance 101
- Public-Private Partnerships (P3) Financing for Energy
- Financing Environmental Infrastructure

[Click here](#) to view the series.

ESG & Municipal Bonds: The State of the Market - Orrick Webinar

Webinar | March.31.2022 | 2pm - 3pm (Eastern Standard Time)

Green, Social, and Sustainability bond issues are gaining popularity as more issuers and borrowers incorporate socially and environmentally responsible factors into their capital planning and operations. Please join Orrick and The Bond Buyer as we explore the growing role of ESG (Environmental, Social, and Governance) in the municipal bond market, the leading bond designation standards, and the costs and benefits of issuing sustainability bonds. Against the backdrop of a self-regulating industry, prevailing guidelines for issuing "Green", "Social", or "Sustainability" bonds in the United States are emerging from foreign organizations. This session will help participants identify eligible projects and gain an understanding of related requirements and best practices.

Topics to be covered:

- The bond designation frameworks (i.e., the International Capital Market Association's Green and Social Bond Principles and the Climate Bonds Initiative's taxonomy).
- "Greeniums," ancillary benefits, and costs associated with issuing sustainability bonds.
- A case study on issuing sustainability bonds in the U.S. municipal market.

[Click here](#) to learn more and to register.

[Introduction to State Budgeting: NASBO Seminar](#)

June 15-17, 2022 | Minneapolis, Minnesota

Registration is currently open to NASBO Members only. On April 1 (no joke), registration will open to Friends of NASBO (other state or federal gov't/non-profit/education) at a rate of \$725.

(Deadline to register is 5/31)

[Click here](#) to learn more and to register.

[BDA Bonding Time Podcast.](#)

Bonding Time Podcast: BDA's Michael Decker talks with ICE Bonds President Peter Borstelmann as part of our "Leaning into Disruption" podcast series.

[Listen to podcast.](#)

Bond Dealers of America

February 21, 2022

[MSRB's Podcast: 2021 in Review](#)

In the MSRB's latest podcast "2021 in Review" Chief Market Structure Officer John Bagley breaks down the key trends and highlights from 2021 and what to expect in 2022.

[Listen now.](#)

[Keeping Pace with Recent Budget Award Criteria Changes Part 2: A Guide to GFOA Resources](#)

February 25, 2022 | Noon-1 p.m. ET

[VIEW DETAILS](#)

[Cash Flow Forecasting: Developing the Right Approach for Your Entity - GFOA Webinar](#)

March 1, 2022 | 1 p.m.-3 p.m. ET

[VIEW DETAILS](#)

[Registration Fees Waived for This Week's NFMA Webinar.](#)

Thursday, February 17, 1pm E - Staffing for the Future: Staffing Trends & Organizational Considerations Post-COVID

Moderator: Paul Greaves, Managing Editor, Debtwire

Panelists:

- Ivan Samstein, Executive Vice President and Chief Financial Officer, University of Chicago Medicine
- Cassandra Jennings, Vice President, Wealth Management Talent Acquisition, Morgan Stanley
- Maurice A. Campbell, Institutional Lending – Public Finance and Healthcare, BNY Mellon

As companies shift back to in person work environments, how does that impact worker recruitment, development, and retention? Many firms are reporting difficulty finding young talent. Which strategies are working? How has remote work impacted training of young municipal bond professionals? At the same time, retirements by older workers have increased. Will a return to the office push more out?

To register, [click here](#).

[NASBO Spring Meeting.](#)

April 27-29 | Santa Fe, New Mexico

[Click here](#) to learn more and to register.

National Association of State Budget Officers

[Market Update for Debt Issuers: GFOA Webinar](#)

February 10, 2022 | 2 p.m.-4 p.m. ET

Nora Wittstruck, Nick Samuels, Cindy Harris, and Grant Dewey

Prerequisite: None.

Details:

This webinar will provide participants with an understanding of the 2022 market conditions for debt issuances and management. An overview of key credit variables will be discussed including – understanding ESG factors; cybersecurity threats; labeled bonds (e.g. green bonds), overall fiscal conditions, phasing out of LIBOR, and what variables rating agencies and investors may be looking

for from issuers in the future.

The session will feature industry experts, interactive discussion, and will highlight for finance officers the importance of understanding how market conditions and trends are related to outstanding and future debt issuances.

Who Will Benefit: CFO/Finance Directors, Controllers, Budget Managers, Treasurers, Debt Managers, or similar.

Learning Objectives:

- Evaluate how new credit factors relate to their debt program
- Discuss the impact market conditions have on debt products
- Understand how market trends and factors impact their government's debt issuances and portfolio
- Interact with industry experts

Member Price: \$85.00

Non-member Price: \$170.00

[REGISTER](#)

The Infrastructure Investment and Jobs Act: What Water Utilities Need to Know (and What Remains to be Seen) - GFOA Webinar

February 11, 2022 | 1 p.m.-2 p.m. ET

Prerequisite: None

Details:

The Infrastructure Investment and Jobs Act (IIJA) was signed into law on November 15, 2021. This legislation includes \$50 billion for water/wastewater infrastructure, distributed over 5 years, and many states have started to prepare for their allocation of the funds. This historic investment in water and wastewater infrastructure has raised lots of questions for water and wastewater utilities. When will projects begin? What funding programs will be open? What types of projects might be eligible? In this webinar, experts from the Government Finance Officers Association (GFOA) will break down what we know so far about the Infrastructure Bill's provisions for water, and what we don't know.

Who Will Benefit: CFO/Finance Director, Controller, Accountant, Treasurer, Water Utilities Management

Member Price: Free

Non-member Price: Free

[REGISTER](#)

NFMA 2022 Annual Conference.

The NFMA will return to in-person events for the 2022 Annual Conference to be held at the Four Seasons Las Vegas on **May 17-20**. Registration begins today. This event will follow Health & Safety Policies to promote a safe environment for all attendees. Click on the links below for more information on the program, speakers, and Health & Safety Policies.

Conference Program: [Click here](#)

Speakers: [Click here](#)

Health & Safety Policies: [Click here](#) (subject to change)

To register: [Click here](#)

2022 Annual Conference Sponsors: [Click here](#)

Rethinking Budgeting: Using Rolling Strategic Planning - GFOA Webinar

Thursday, February 3, 2022

[VIEW DETAILS](#)

BDA Bonding Time Podcast.

Bonding Time Podcast: BDA's Brett Bolton talks with Hilltop Securities' Tom Kozlik about the 2022 outlook for municipal bond legislation on Capitol Hill

[Listen to audio.](#)

Bond Dealers of America

January 27, 2022

Registration is Open for GFOA's 116th Annual Conference!

We're excited to be returning to an in-person event for **GFOA's 116th Annual Conference, June 5-8, 2022, at the Austin Convention Center, Texas**. Attend the conference to learn from leading practitioners and subject matter experts on how to leverage tools found in public finance to build a better community.

[CONFERENCE HOMEPAGE](#)

Novogradac Online LIHTC Property Compliance Workshop.

The Novogradac Online LIHTC Property Compliance Workshop is an 11-hour, two-day course, led by knowledgeable instructors, to provide attendees with the most up-to-date low-income housing tax credit (LIHTC) compliance knowledge and industry trends critical to owners and property managers. At the conclusion of the workshop, attendees have the opportunity to pass an exam to obtain the Novogradac Property Compliance Certification (NPCC), a certification for members of the LIHTC community.

For instructor information, agenda, pricing and more, visit the [content page](#).

Dates:

Tuesday February 8 - Wednesday February 9

11:30 am to 5:00 pm ET (8:30 am to 2:00 pm PT)

[Register](#)

Exploring Demographic & Organizational Trends in a Post-COVID World: NFMA Webinar

Keynote Speaker: Sergio Rebelo, *MUFG Bank Distinguished Professor of International Finance at the Kellogg School of Management*, Northwestern University

Moderator: Nicole Byrd, Senior Investment Professional, Nationwide Insurance

This webinar will open the NFMA's Winter Advanced Webinar Series, with the theme, "Assessing the New Normal in a Post-Covid World". Professor Rebelo will discuss the impact that large, ongoing structural transformations in the U.S. economy will have on U.S. cities. These transformations include the polarization of consumer demand into value and luxury, the emergence of remote work as an important part of the work landscape, the digital transformation of the service sector, and climate change.

To register, [click here](#). This event is a benefit of NFMA membership, and non-members may attend for a registration fee of \$100. As with all Advanced Webinars and Seminars, no press permitted.

Webinar: Investing in Muni Bonds in the Time of Infrastructure and Inflation

The U.S. municipal bond market has been one of the best-performing fixed-income asset classes in 2021, supported by strong investor demand and limited new-issue supply amidst ongoing negotiations over a Federal infrastructure aid package.

Can they maintain the momentum once the money starts flowing? Our experts will share their outlooks for the market in 2022, including viewpoints on volume, credit quality, and technical supply and demand factors.

[Click here](#) to watch the webinar.

Jan 05, 2022

[Orrick Webinar: Innovative Infrastructure Delivery under the Infrastructure & Investment Act - Replay Available](#)

December.15.2021 | 12pm - 1pm (Eastern Standard Time)

Webinar - [Recording Available](#)

The bipartisan infrastructure legislation will provide \$973 billion over the next five years, including \$550 billion in new investments for all modes of transportation, water, power and energy and broadband.

Please join Orrick and the Bond Buyer as we discuss the legislation and how the Infrastructure & Investment Act (the "Act") will impact the municipal finance industry.

Topics to be covered include:

- How will the Act impact federal credit programs?
- How does the Act encourage innovative infrastructure delivery, including public-private partnerships and design-build?
- What should municipal clients be doing now to prepare for the Act's implementation?

Panelists:

- Matthew Neuringer, Senior Associate Orrick
- Helen Pennock, Senior Associate Orrick
- Chris Elmore, Vice President Goldman Sachs, Inc.
- Caitlin Devitt, The Bond Buyer

[GFOA Alliance for Excellence in School Budgeting Winter Meeting.](#)

January 13, 2022

Details:

The Alliance for Excellence in School Budgeting is a group of 100-plus school districts working on implementing GFOA's Best Practices in School Budgeting. A part of the Smarter School Spending initiative, the Alliance first met in 2015 and includes a diverse group of districts from across the United States. The annual meeting of the Alliance includes senior staff from academic and finance learning, sharing and networking with their peers from other districts to improve their budgeting and planning processes. Topics covered at the annual meeting will include using GFOA's school budgeting roadmap and self assessment tool, developing strategic finance plans, finance/academic collaboration, and stakeholder engagement.

This session will include topics and speakers over four (4) days and features a mix of presentations,

small group discussions, and interactive exercises.

Learning Objectives:

- Network, share, and learn from outside experts and your Alliance peers
- Complete a self-assessment to determine next steps for your district in improving its budget process
- Learn more about the key areas of GFOA's Best Practices in School Budgeting
- Learn tips, advice, and tricks from others working to implement the best practices - and how to deal with pressing issues.
- Gain perspectives on budget process pain points from your academic or finance peers

[Click here](#) to learn more and to register.

[Note Disclosures and RSI for Pensions and Other Postemployment Benefits \(OPEB\): GFOA Webinar](#)

January 19, 2022 | 2 p.m.-4 p.m. ET

Details:

This seminar will provide a comprehensive examination of all pension- and OPEB-related note disclosures and required supplementary information (RSI) that must be presented by governmental employers that provide these benefits to their employees.

Learning Objectives:

Those completing this seminar will be able to:

- Understand general content requirements for note disclosures and RSI by employers that provide pension and OPEB to their employees
- Understand differences in note disclosures and RSI required of employers that provide pension and OPEB defined benefit and defined contribution arrangements
- Understand differences in note disclosures and RSI required of employers that provide pension and OPEB through single-employer, agent multiple-employer, and cost-sharing multiple-employer plans
- Understand differences in note disclosures and RSI required of employers that provide pension and OPEB via plans administered through trusts or similar arrangements that meet criteria set by the Governmental Accounting Standards Board and for benefits not administered through such arrangements
- Understand the limited disclosure requirements for governments that provide pension or OPEB through plans in which non-governmental employers are the predominant participants

[Click here](#) to learn more and to register.

[Orrick Webinar: Financing Affordable Housing with 501\(c\)\(3\) Bonds - Replay Available](#)

Webinar | December 14.2021 | 11am - 12pm (Pacific Standard Time)

In a market where volume cap is becoming less available, 501(c)(3) entities provide an alternative means of accessing capital to provide affordable housing. This webinar will be a discussion of the different ways 501(c)(3) entities can be used, including accessing capital directly in the corporate market, accessing the tax-exempt market, or providing bridge financing until volume cap is available in a jurisdiction.

[Webinar – Recording Available](#)

Infrastructure Finance Series Featuring Frost Brown Todd LLC.

With a growing national focus on infrastructure financing, communities throughout the country are actively searching for innovative strategies and solutions for building transportation, energy, water, broadband, and resiliency infrastructure. CDFA is honored to partner with Frost Brown Todd LLC and its affiliate FBT Project Finance Advisors LLC to present the Infrastructure Finance Series. This in-depth series focuses on the characteristics of infrastructure, the innovative tools for financing various infrastructure projects, and how the private sector impacts the landscape of infrastructure investment.

Frost Brown Todd LLC is a full-service law firm dedicated to refining the art of client service, by leveraging technical, industry, and legal knowledge and hands-on experience to serve a diverse client base. Its affiliate FBT Project Finance Advisors LLC is a registered municipal advisor focusing on development finance. Counseling clients from the earliest stages of each project through financing, construction, and project administration, FBT Project Finance Advisors works with clients to develop solutions that fit their community's needs, protect their balance sheet, and deliver bottom-line results.

[Learn more.](#)

Financing Affordable Housing with 501(c)(3) Bonds: Orrick Webinar

December 14, 2021 | 2:00 p.m. EST / 11:00 a.m. PST

In a market where volume cap is becoming less available, 501(c)(3) entities provide an alternative means of accessing capital to provide affordable housing. This webinar will be a discussion of the different ways 501(c)(3) entities can be used.

[Click here](#) to learn more and to register.

ESG Relevance Scores in Credit Ratings vs Sustainable Fitch ESG Ratings in Financial Institutions: Fitch Webinar

15 December 2021 | 3:00 - 4:00pm CET

Join us for a discussion and introduction to our new ESG Ratings from Sustainable Fitch.

Maria Bazhanova, Associate Director in the Sustainable Fitch team will provide you with an introduction to the ESG Ratings and Janine Dow, Senior Director, Sustainable Fitch, will introduce you to the differences between the established ESG Relevance Scores in Credit Ratings and the new ESG Ratings in Financial Institutions.

KEY TOPICS

ESG Ratings:

- Introduction to Sustainable Fitch's ESG Ratings and the underlying methodology.

ESG Relevance Scores in Credit Ratings vs. ESG Ratings:

- ESG Relevance Scores in Credit Ratings
- From Credit Ratings to ESG Ratings: Difference between the ESG Relevance Scores in Credit Ratings vs ESG Ratings

The discussion will be followed by a Q&A session. Please send any questions in advance to Christiane Treutel: christiane.treutel@fitchratings.com.

We hope you can join us for this event.

[REGISTER NOW](#)

[Previewing Enhanced CUSIP Groups Feature on EMMA: MSRB Webinar](#)

On December 2, join MSRB staff for a free webinar to preview the completely redesigned "CUSIP Groups" feature that allows issuers to save a group of CUSIPs to use for future disclosure filings. This is one of a series of enhancements the MSRB is making to the free tools available for managing CUSIPs in the Electronic Municipal Market Access (EMMA®) system.

[Click here](#) to learn more and to register.

[Overview of Public Procurement: GFOA Webinar](#)

December 6, 7 & 8 2021 | 2-4:45 p.m. ET

Details:

Procurement is an essential function for all governments and serves to provide service that connects public sector operations with private sector suppliers, contractors, and providers. High performing procurement functions not only support government's responsibility to use resources effectively, they also promote efficient operations, reduce business continuity risk, and work to maintain trust in government. Unfortunately not all organizations utilize procurement to its full strategic potential. In this course, instructors will cover the basics of public procurement, provide an overview of key processes and policies, highlight important features and tools of modern procurement functions, and

explain how the profession is evolving to better meet the needs of governments.

Learning Objectives:

- Understand the basic principles of public procurement
- Identify strategies to better integrate procurement and finance
- Explore procurement ethics and how to apply commonly held values to everyday situations
- Review components of a procurement policy
- Learn best practices for common procurement processes
- Identify how to apply a more strategic role for procurement
- Understand technologies available to assist public procurement processes

Member Price: \$315.00

Non-member Price: \$630.00

[Click here](#) to register.

Best Practices and Strategies for Public Investing: GFOA Webinar

November 30, December 1 & 3 | 12:30-3:15 p.m. ET

Details:

This course offers attendees a comprehensive agenda of the concepts and techniques needed to effectively manage their investment portfolios. This two-day course highlights the importance for governmental entities to have a robust investment policy and corresponding procedures, and brings attention to GFOA's best practices related to investing. Through interactive activities and classroom presentations, attendees will gain a better understanding of the various elements of an investment program, whether the portfolio is managed internally or externally. Topics covered include: cash flow forecasting, hiring and managing external professionals, types of investments commonly used in the public sector, investment strategies for liquidity and core investment funds, managing risks, benchmarking, and reporting.

Learning Objectives:

Those who successfully complete this seminar should be able to:

- Understand key components of an investment policy
- Develop an approach to cash flow forecasting and understand how that leads to investment decisions
- Understand key factors in hiring and managing external investment professionals
- Learn how to use tools to raise awareness of and develop tools to manage various risks related to investing
- Approach the multifaceted segments of investment strategies
- Choose the right benchmarking standard for your portfolios

Member Price: \$315.00

Non-member Price: \$630.00

[Click here](#) to register.

Understanding Government Compensation and Payroll: GFOA Webinar

November 17, 18 & 19 | 2-4:45 p.m. ET

Member Price: \$315.00

Non-member Price: \$630.00

[REGISTER](#)

Essential Tools for Effective Payable Policies and Procedures in the Treasury Department: GFOA Webinar

November 8, 2021 | 2 p.m.-4 p.m. ET

Details:

Governments make payments every day through a variety of avenues, including ACH, checks, wire transfers, p-cards, cash, and other methods. It is critical that governments have appropriate policies and procedures in place to ensure timely payments, maintain necessary government operations, and prevent against internal and external fraud instances. This course will assist finance officers with developing, reviewing, and updating their policies and procedures related to payables. Key components of the training will include: Overview of payable methods typically used by governments Benefits and risks of utilizing electronic payments, cash payments, and check payments Expanding options available for making electronic payments Third-party relationships required to make payments (banks, payment providers, etc.) Tracking payments internally and the associated software needs Internal controls required to prevent internal and external fraud Timely reconciliation and record keeping.

Learning Objectives:

Review the core payables function in the Treasury Office

Learn recommended policies and procedures

Identify fraud hazards from multiple sources and ways to prevent fraud

Understand the opportunities and responsibilities with any external relationships used to assist with a government's payables function

Member Price: \$85.00

Non-member Price: \$170.00

[REGISTER](#)

Fitch ESG Outlook Conference.

8-9 December 2021 | 09:00 - 13:00 EST

We're pleased to announce our first ESG Outlook Conference under Sustainable Fitch - the second

annual ESG Outlook presented by Fitch Group.

Don't miss your chance to experience ESG in action. See first-hand how ESG data is leveraged to communicate the true financial risk and impact of companies worldwide.

This two-day virtual event includes a valuable mix of keynotes, interviews, case studies and workshops including attendee participation and interaction. Beyond the standard high-level view, take a deep dive into the intersection of ESG risk and debt capital markets. Day 2 will feature specific break-out sessions by sector with real use cases and actionable take-aways.

Here is a sneak peek at this year's agenda:

Day 1 - 8 December

- ESG Outlook: Key Themes for 2022
- Post COP 26 Review: Thoughts and Implications
- Introduction to ESG Ratings with Case Study
- Workshops/Demos

Day 2 - 9 December

- The Technician Corner: Understanding Supply Chain Analysis
- Trends in the Global Hydrogen Market
- Break-out sessions by sector including;
 - Corporates & Financial Institutions
 - Real Assets (MBS, ABS, Project Finance)
 - Sovereign & Public Finance

You don't want to miss this event so register today!

[REGISTER NOW](#)

Fitch Quarterly Review on ESG 3Q21.

Thursday 28 October | 15:30 BST | 10:30 EDT

Please join Sustainable Fitch for our quarterly live presentation on ESG and its ever-growing credit implications. Our Sustainable Finance team will be reviewing the latest developments in the ESG markets and give you a glimpse of the wealth of resources Fitch's dedicated specialists produce.

The discussion will focus on:

- Key ESG Relevance Score trends and market developments for 3Q21 and a review of changes YTD, including what factors have been the main drivers over 2021.
- A review and assessment on the major developments around sustainability and climate-related disclosures in major markets.
- Exploring why Biodiversity and Nature-related Risks are rising in investors agendas.
- Expectations ahead of COP26 and the key benchmarks for success.

Speakers:

- Marina Petroleka, Global Head of ESG Research
- David McNeil, Head of Climate Risk

[Register now.](#)

[NFMA Introduction to Municipal Bond Credit Analysis.](#)

Each year since 1987, the NFMA has held the Introduction to Municipal Bond Credit Analysis. Though the pandemic has prevented the in-person presentation again this year, we have invited speakers to discuss eleven topics over three afternoons, on **November 17, 18 and 19, 2021**. This course is designed for new analysts, support and sales personnel, and has also been found worthwhile for seasoned analysts seeking to brush up on other sectors. Non-members are welcome to attend.

To view the program, [click here](#).

One registration fee covers all three sessions which run from Noon Eastern to 4:45pm on Days One and Two, and until 3:40pm on Day Three. Registrants may stay logged in to Zoom during breaks and may attend the live sessions and/or watch the replays until February 1, 2022.

Registration for is \$200 for the webinar series. We are offering group registration for up to five registrants at a cost of \$500.

To register one person, [click here](#).

To use the group form, [click here](#).

[ARPA Funds: Non-Entitlement Units - GFOA Webinar](#)

October 12, 2021 | 11 a.m.-Noon ET

Details:

In this Just-in-Time training, GFOA's Federal Liaison Center covers the Coronavirus State and Local Fiscal Recovery Funds (SLFRF) through the lens of Non-Entitlement Unit (NEUs) recipients. NEUs are defined as, "local governments typically serving a population under 50,000". Join October 12 for a recap and revision of current SLFRF guidance specific to NEUs.

Who Will Benefit:

CFO/Finance Director, Controller, Budget Manager, Accountant, Treasurer, Debt Manager, Depart Dir.

Learning Objectives:

- Gain insight on the rules and requirements of current SLFRF guidance
- Identify examples within the eligible expenditures specific to NEUs
- Learn GFOA's guiding principles on developing a spending plan

- Understand the current reporting guidance specific to NEUs

Member Price: Free

Non-member Price: \$70.00

[REGISTER](#)

Disclosure Update: GFOA Webinar

October 4, 2021 - 2 p.m.-4 p.m. ET

Details:

Issuers of municipal securities have numerous disclosure responsibilities related to their bond transactions. This includes mandated filings of annual financial information and material event notices in the MSRB's EMMA system, and other types of voluntary disclosures. Industry experts will discuss these issues as well as recent SEC activities related to disclosure. A review of GFOA's best practices and the importance of developing and maintaining disclosure policies and procedures will also be addressed.

Learning Objectives:

Those completing this seminar will be able to:

- Understand the requirements related to primary market and continuing disclosure
- Develop new or review existing disclosure policies and procedures
- Learn about recent SEC activities related to disclosure
- Review GFOA best practices on disclosure and making voluntary disclosures

Member Price: \$85.00

Non-member Price: \$170.00

[REGISTER](#)

SEC, MSRB, FINRA to Hold Compliance Outreach Program for Municipal Advisors.

Washington D.C., Sept. 20, 2021 — The Securities and Exchange Commission's Division of Examinations and Office of Municipal Securities (OMS), the Municipal Securities Rulemaking Board (MSRB), and the Financial Industry Regulatory Authority (FINRA) today announced the opening of registration for the 2021 Compliance Outreach Program for Municipal Advisors. The virtual program will be held **Thursday, Oct. 7, 2021, from 10 a.m. to 5 p.m. ET**. Additional information and program materials, including the [agenda](#) are available on the SEC website.

The program will provide municipal advisors and other municipal market participants an opportunity to hear from SEC, MSRB, and FINRA staff on timely regulatory and compliance matters. Topics of discussion include managing conflicts of interest disclosures; operational considerations for registered municipal advisors; municipal advisors' participation in new issue pricing; preparing for

an examination; SEC and FINRA examination processes and common observations; and relevant SEC and FINRA enforcement actions. A tutorial on using the EDGAR system will also be presented.

“OMS is pleased to participate in this event for municipal advisors in the virtual format. We enjoy the opportunity to speak directly to and encourage a dialogue with the municipal advisor community. Our goal with this event is to promote a greater understanding of and compliance with municipal advisor duties under the federal securities laws,” said OMS Director Rebecca Olsen.

Daniel Kahl, Acting Director of the SEC’s Division of Examinations added, “I am delighted that we are once again holding this important outreach event. This program is one example of the Division’s efforts to be transparent when it comes to the examination program and includes panels on common exam findings and how to prepare for an examination. With representatives of the SEC, MSRB, and FINRA, as well as industry participants, the program should provide an excellent learning opportunity for municipal advisors regarding their regulatory obligations from multiple perspectives. The open dialogue I expect at the event should serve to bolster compliance efforts and ultimately enhance investor protection.”

MSRB Chief Regulatory Officer Gail Marshall said, “We are pleased to again partner with the SEC and FINRA on a program that allows us to engage with municipal advisors across the country. This program is a great capstone to the series of virtual regional town halls for municipal advisors that the MSRB held during the summer months. Creating opportunities such as this to engage in thoughtful dialogue will better inform our work that is centrally focused on reducing unnecessary costs and burdens for municipal advisors while also finding impactful ways to support compliance.”

“The municipal securities market plays an important role in U.S. capital markets, providing opportunities for new and experienced retail investors as governments leverage bonds, complex structured products and financial derivatives to address their infrastructure and capital needs,” said Bari Havlik, FINRA’s Executive Vice President of Member Supervision. “This program enables municipal advisor firms across the country to hear from regulators about areas of oversight, compliance and obligations that promote a fair and efficient market.”

Registration is being administered by FINRA. The program is free and open to all. [Register to attend the program here](#). For those who cannot attend the live virtual program, the recording will be archived on the SEC’s [Compliance Outreach Program for Municipal Advisors webpage](#) for later viewing. To submit questions in advance of the event, email 2021MAOutreach@sec.gov.

[Extreme Weather and Municipal Credit: Understanding the Risks and Opportunities - NFMA Webinar](#)

October 21, 2021

Free to NFMA members; \$100 for non-members. To register, go to the Event Calendar or [click here](#).

[BDA Bonding Time Podcast: Infrastructure Analysis and Muni Bonds](#)

In this installment of Bonding Time featuring Tom Kozlik of HilltopSecurities, we discuss the ongoing infrastructure deliberations in Congress including the recent introduction of muni

provisions in the Ways and Means reconciliation draft and handicap potential next steps in both the House and Senate.

We also discuss the immediate and long-term impacts of a potential federal default and a government shutdown on the overall health of the markets and the current lack of a plan to solve these self-made crises.

[Listen to the podcast.](#)

Bond Dealers of America

September 21, 2021

Moody's Muniland Podcast: US Infrastructure Bill Would Reduce Lead Contamination; US West Drought Hits Water Supply

Dan Kowalski and Michael Wertz of the US Public Finance team discuss the bill's funding to replace lead service lines and water utilities facing a mix of aging assets and climate change.

Plus, Steven Goodman-Leibof and Helen Cregger weigh in on the credit effects of water reductions in Arizona, Nevada and California.

[LISTEN TO THE PODCAST](#)

Introduction to ESG Ratings: Fitch Webinar

22 September 2021 | 16:00 BST | 11:00 EDT

Join us on Wednesday 22 September, 4:00 PM BST, for a presentation of Sustainable Fitch's new ESG Ratings.

For this webinar we are pleased to offer translation into Spanish and Portuguese. Please choose your preferred language on the widget in the webinar console.

Fitch Group's new division, Sustainable Fitch, recently launched a comprehensive range of ESG Ratings products, at both an entity and instrument level, for all asset classes globally.

The ESG Ratings suite is designed to help market players to discriminate the ESG quality of both financial instruments and the entities that issue them. Our ESG Entity Ratings evaluate an entity's activities from an environmental and social perspective, as well as the quality and outcomes of its policies and governance. Our ESG Instrument Ratings assess the ESG credentials of individual bonds or loans in the context of the entity that is issuing them, and where there is a labelled or KPI-linked instrument also provide a standalone assessment of the quality of the framework.

Fundamentally, the focus of our ESG Rating analysis is on actions, outcomes, impacts and activities rather than purely on policies and broader commitments. Our instrument analysis looks beyond the labelling to focus on the fundamentals.

The ESG Ratings suite can assess all types of debt instruments (bonds and loans), whether they are

labelled, plain vanilla, or structured instruments, as well as any type of entity (corporate, leveraged finance, financial institution, sovereign, supranational and agency (SSA), project finance, public finance and structured finance).

In this session, Andrew Steel, Managing Director, Global Head of Sustainable Fitch, and Gianluca Spinetti, Senior Director, Head of Product Development, will detail the ESG Rating methodology, explain how ratings can be used and discuss findings from the first universe of ratings assigned.

Highlights Include:

- Addressing capital market needs and concerns
- Providing modularity and granularity
- Introduction to ESG Entity Rating, ESG Instrument Rating, and ESG Framework Rating
- Methodology and references used (EU Taxonomy, UN SDGs, EU Green Bond Standard, ICMA guidelines)
- Data and research output
- Facts and findings from assigned ratings

Questions can also be emailed in advance to aymeric.poizot@fitchratings.com

[REGISTER NOW](#)

[Novogradac Private Activity Bond and 4% LIHTC Overview Recording.](#)

Monday, July 26, 2021 - 7:43am

On-Demand Training

The Novogradac Private Activity Bond and 4% LIHTC Overview Webinar Recording presents an overview of the major accounting concepts associated with the use of private activity bonds and 4 percent low-income housing tax credits (LIHTCs) to finance affordable multifamily rental housing properties. The recording focuses on the 50% Test, the 95-5 Test and challenges of complying with bond rules and LIHTC rules.

[Click here](#) for the recording.

[How to Explain Pension Obligation Bonds to Your Governing Board: Orrick On-Demand Webinar](#)

On-Demand Webinar | August 26.2021 | 2pm - 3pm (Eastern Daylight Time)

Panelists on this Web Seminar will discuss and analyze the issuance of pension obligation bonds from the decision-making perspective of an issuer, sharing examples of principal considerations that an issuer's finance managers and governing board members are called to consider prior to moving forward with a pension obligation bond (POB) issuance:

- How and why to consider the refunding of unfunded pension liabilities with POBs?
- What market conditions make POBs one tool to combat rising pension costs?

- What is needed (board study sessions, policies, etc.) to responsibly move forward with a POB issuance?
- How much unfunded pension liability should an issuer consider refunding with POBs?
- What happens if conditions (stock market, actuarial assumptions, etc.) change after POBs are issued?

Donald Field, a partner with Orrick, Herrington & Sutcliffe LLP, will lead an experienced panel through these and other critical questions. The focus of the panel will be to share recent market experience with issuers considering POBs, particularly governing board members and those who might be tasked with presenting for governing board consideration the how's and why's of POBs as an effective tool to address rising pension costs, and the development of pension funding policies for best financial practices.

Key Presenters:

Donald Field

Partner, Orrick
(Moderator)

Oliver Chi

City Manager, City of Huntington Beach
(Speaker)

Mark Young

Managing Director, KNN Public Finance
(Speaker)

John Kim

Managing Director & Executive Committee Member, Stifel
(Speaker)

Kevin Hale

Counsel, Orrick
(Speaker)

Mike Perkowski

Co-Founder and Partner, New Reality Media, LLC
(Bond Buyer Moderator)

[Click here](#) to watch the webinar.

[BDA's Fixed Income Leadership Three-Part Webinar Series is NEXT WEEK.](#)

September 9-10, 2021

Thursday, September 9

Time - TBD

Corporate Market Structure, New Technologies, and Liquidity Providers

The conversation will focus on the evolution of electronic trading since the pandemic began, trading protocol usage, the role of non-bank liquidity providers, and what to watch in the coming year.

- Kevin McPartland, Coalition Greenwich
- David Parker, MTS Markets
- Jim DiMonte, KeyBanc Capital Markets

Friday, September 10

10:00 am ET

Bond Market Regulation - 4210, G13, 15c2-11, Muni Advisor Rule, Corporate Syndicate Rule, Remote Work

Hear from senior staff of the SEC, FINRA, and MSRB on hot topics in fixed income regulation, compliance, and enforcement. We will examine issues like FINRA's margin rule, MSRB Rule G-13 and the recent related compliance case, SEC Rule 15c2-11, and other key topics. Dan Deaton, partner at BDA member firm Nixon Peabody, will provide commentary.

- Rebecca Olsen, SEC
- Cindy Friedlander, FINRA
- Gail Marshall, MSRB
- Dan Deaton, Nixon Peabody
- Moderated by Michael Decker, BDA

Friday, September 10

11:00 am ET

Municipal Markets 2021 - Credit Conditions and Issuance Expectations, plus What to Expect from Washington, DC

We will look into current credit conditions and issuance expectations as localities continue to recover from the COVID-19 pandemic and what we can expect for the remainder of the year. The discussion will also provide a legislative update and the current status of key muni legislation in DC.

- Tom Kozlik, HilltopSecurities
- Stephen Winterstein, MarketAxess
- Brett Bolton, BDA

Registration Fees

*For full series of all three webinars

Single User - \$95

Firm Enterprise Fee (up to 50 weblinks per firm) - \$300

[Click here](#) to register.

Please contact Rebecca Cooke-Rodriguez if you would like to change your registration at rcrodriguez@bdamerica.org

[CDEFA // BNY Mellon Development Finance Webcast Series: Layering the Capital Stack](#)

September 21, 2021 | 2:00 PM - 3:00 PM Eastern

The phrase "Capital Stack" is one that is pretty commonplace in the Development Finance

nomenclature these days, but what does it truly mean to build the Capital Stack and how can it work for your project? This session will discuss how Bonds, Tax Increment Finance, Tax Credits as well as the litany of federal funding through recent legislation can work for your project and ultimately the community that is benefitting.

[Click here](#) to learn more and to register.

GFOA 2021 GAAP Update.

November 4, 2021 | 1 p.m.-5 p.m. ET

Details:

Government Finance Officers Association (GFOA) will offer its 2021 GAAP Update on November 4, 2021, with encore presentations on December 9, 2021, and January 13, 2022, using GFOA's online learning management system (LMS).

Participate in interactive exercises to test your knowledge of the material being presented. Receive immediate feedback to your questions during the program from GFOA's Technical Services Center staff.

Key topics* that will be covered during this year's session include:

New GASB pronouncements:

- GASB Statement No. 98, *Annual Comprehensive Financial Report* (anticipated)
- GASB Implementation Guide No. 2021-1, *Implementation Guidance Update-2021*

Updates on GASB projects on:

- Compensated Absences
- Accounting Changes and Error Corrections
- Omnibus - 202X
- Disclosure Framework

Special segment - Implementing GASB 87, *Leases*, first effective for fiscal years ending June 30, 2022

Update on new developments impacting audits of state and local governments, including implications of CARES Act and ARPA assistance

Common deficiencies seen in applications for GFOA's Certificate of Achievement for Excellence in Financial Reporting

Current Implementations:

- GASB Statement No. 89, *Accounting for Interest Cost Incurred before the End of a Construction Period*
- GASB Statement No. 90, *Majority Equity Interests*
- GASB Statement No. 92, *Omnibus 2020*
- GASB Implementation Guide No. 2020-1, *Implementation Guidance Update-2020*

**Topics are subject to change*

Learning Objectives:

- Prepare to implement new pronouncements including GASB 87, *Leases*, arguably the most complex new standard since the postemployment benefits standards
- Understand the implications of proposed guidance for which GASB has sought comments; and
- Become familiar with:
 - Other new accounting standards and implementation guidance recently issued by GASB
 - Current issues affecting financial statement audits and federal funds Single Audits of state and local governments
 - Reporting shortcomings frequently seen by GFOA

[REGISTER](#)

Best Practices for Rural Development Finance Agencies: CDFA Rural Development Finance Webinar Series

August 31 | 2:00 PM - 3:00 PM Eastern

There are hundreds of development finance agencies working in concert to support rural communities. They exist at all levels of government, in communities of all sizes, and provide financing programs to address multiple capital needs. How do you find a development finance agency that is the right fit for your rural community? During the third installment of the CDFA Rural Development Finance Webinar Series, discover best practices of development finance agencies to help you identify the right partner for your projects.

[Click here](#) to learn more and to register.

Novogradac 2021 Fall Opportunity Zones Conference.

Hilton Cleveland Downtown & Online | October 21, 2021 - 8:30am to October 22, 2021 - 5:30pm

Introducing the Novogradac 2021 Fall Opportunity Zones Conference.

Develop your professional relationships and reconnect with others active in opportunity zones (OZ) investment in Cleveland, a city that is benefiting from more than \$250 million of OZ investment. Learn from qualified opportunity fund (QOF) managers, investors, developers and Novogradac accountants who will discuss the state of the marketplace, types of project trends, plus structuring and operational considerations of QOFs.

For those unable to join us in Cleveland, we invite you to join us online, where you can view our panels, chat with both in-person and virtual attendees, plus watch online-only content of the event.

[Click here](#) to learn more and to register.

[Complimentary GFOA Training on the CSLFRF Compliance & Reporting Guidance.](#)

The first reporting deadline for the Coronavirus State and Local Fiscal Recovery Funds (CSLFRF) is quickly approaching at the end of August. To bring CSLFRF recipients up to speed with their compliance and reporting responsibilities as well as a breakdown of each type of report, GFOA is hosting a complimentary just-in-time training next week.

[Learn more.](#)

[CDFA Rural Development Finance Webinar Series: Best Practices for Rural Development Finance Agencies](#)

Tuesday, August 31, 2021 | 2:00 PM - 3:00 PM Eastern

Best Practices for Rural Development Finance Agencies

There are hundreds of development finance agencies working in concert to support rural communities. They exist at all levels of government, in communities of all sizes, and provide financing programs to address multiple capital needs. How do you find a development finance agency that is the right fit for your rural community? During the third installment of the CDFA Rural Development Finance Webinar Series, discover best practices of development finance agencies to help you identify the right partner for your projects.

Moderator(s)

[Click here](#) to learn more and to register.

[CDFA Federal Financing Webinar Series: The Federal Role in Financing Broadband](#)

Tuesday, September 14, 2021 | 2:00 PM - 3:30 PM Eastern

The Federal Role in Financing Broadband

Next-generation technology will increasingly rely on 5G networks. Communities with small economies and insufficient capacity to fund and operate their own broadband networks will become underserved and left behind. Federal agencies such as the National Telecommunications and Information Administration (NTIA), the USDA, and the Federal Communications Commission (FCC) have financing programs available to help bridge the gap communities face when assembling capital to invest in their broadband networks. During this installment of the CDFA Federal Financing Webinar Series, experts will discuss how federal financing tools can be used to fund 5G broadband networks.

[Click here](#) to learn more and to register.

Introduction to the American Rescue Plan Act Funds for Water Bill Assistance and Infrastructure Projects: GFOA Webinar

August 12, 2021 | 1 p.m.-2:15 p.m. ET

Details:

Legislative activity on Capitol Hill in the year 2020 was dominated by the development of multiple aid packages in response to the outbreak of COVID-19. To address the vital need for widespread access to drinking water & wastewater utilities, Congress has authorized billions to assist households and utilities with water utility affordability and stormwater infrastructure projects. Join experts from the Government Finance Officers Association (GFOA) and Environmental Finance Center Network (EFCN) for an introduction to the American Rescue Plan Act (ARPA, the Low-Income Housing Water Assistance Program (LIHWAP), and Emergency Rental Assistance Program (ERAP) to learn what to expect when dealing with these federal assistance programs.

[Click here](#) to learn more and to register.

Overview of Public Procurement: GFOA Webinar

August 12, 13 & 16 | 2-4:45 p.m. ET

[Click here](#) to learn more and to register.

Intro Public-Private Partnership (P3) Finance Course: CDFA Webinar

August 11-12, 2021 | Daily: 12:00 - 5:00 PM Eastern

Overview

The Intro Public-Private Partnership (P3) Finance Course examines this emerging development finance model with a focus on how development finance agencies can adopt P3 principles to address a variety of projects. This course covers basic P3 concepts, key players involved in transactions, asset valuation, contract negotiation, risk assessment, revenue stream development, and feasibility analysis. In addition, several P3 projects from across the country will be presented, and P3 experts will analyze the successful elements in each deal.

Interest in P3 financing is growing as state and local governments face tough budget decisions along with declining federal investment in infrastructure. Several state and local agencies have used P3 to finance real estate developments, schools, parking garages, public transit, affordable housing, water facilities, and more. During the Intro P3 Finance Course, industry experts discuss the common characteristics and drivers of P3 financing's throughout the country and explain the various structures of these deals.

This course will qualify for the CDFA Training Institute's Development Finance Certified Professional (DFCP) Program. Join us online, and start down the road to personal and professional

advancement today.

[Click here](#) to learn more and to register.

[The NABL Workshop: Hybrid 2021](#)

NABL is bringing back its in-person meetings with **[The Workshop: Hybrid 2021, October 13-15, 2021, at The Fairmont Hotel in Chicago](#)**. It's time for you to mark your calendar as "busy" and register for the conference early. The event will have limited in-person seating due to COVID-19, so it's important to secure your spot now. In-person registration will be filled on a first-come, first-served basis. We are also providing a virtual option for The Workshop.

If you [join NABL](#) as a member and register for The Workshop **by Friday, August 20**, you will save more than \$200 off the conference rate, and your membership will extend through December 31, 2022! The cost for joining plus The Workshop is \$1,140 (nonmember registration, without joining, is \$1,345). As a member, you will receive significant discounts on all CLE webinars and conferences through 2022, plus receive access to member-only areas of the website.

This year's conference will include:

- The Opening General Session, "The Growth of ESG in Public Finance," will cover the growing trend in public finance to capitalize on green investing and frameworks around environmental, social, and governance (ESG) factors. The session will feature different thought leaders in the industry who will discuss ESG trends and considerations in the public finance market.
- NABL's Annual Meeting, where you will hear from NABL's 2021-22 President, Ann D. Fillingham, Dykema Gossett PLLC, and NABL members will vote for NABL's Officers and Board of Directors.
- A new session "The Role of Issuer's Counsel in a Bond Issue - Before, During and After Bond Issuance" that will explore the role of issuer's counsel before, during and after bond issuance, and will focus on the in-house issuer perspective.
- There will also be 23 breakout sessions over three days including Hot Topics in Tax Law, Hot Topics in Securities Law, and three ethics sessions.

[Check out this year's line-up!](#) The meeting will offer up to 11.25 live CLE credit hours for those who attend in-person or virtually. For in-person registrations, NABL will send an email with the hotel reservation information to secure your hotel room.

In-Person Registration Requirement: All in-person attendees must be fully vaccinated prior to attending the conference. Registered attendees will need to email a PDF of their COVID-19 vaccination record card as proof to NABL at registration@nabl.org, by Friday, **September 3, 2021**. If you register for in-person and don't provide proof by September 3, your in-person registration will default to a virtual registration.

[Join and Reserve Your Spot Now for The Workshop: Hybrid 2021!](#)

[Novogradac 2021 Affordable Housing Tax Credit and Bond Conference.](#)

September 30 - October 1st, 2021, Hutton Hotel, Nashville TN & Online

[Click here](#) to learn more and to register.

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