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## **Fundamentals of Local Government Budgeting: GFOA eLearning Course**

**January 21, 22, 23, 28 29, 30 2026 | 1-3 p.m. ET**

### **Details**

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 discussions and 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 better community outcomes. In addition, the course will cover specific techniques for developing the budget, communicating budget messages, and balancing the budget in times of financial distress.

### **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
- Learn techniques for 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 times of fiscal distress

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

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## **Registration Open for GFOA's 120th Annual Conference.**

Join us **June 28 - July 1, 2026, in Chicago, Illinois**, for a milestone celebration of innovation, excellence, and thriving communities. For 120 years, GFOA members have helped shape the future of public finance, and #GFOA2026 will continue that tradition with more than 80 CPE-accredited, peer-led sessions, inspiring keynote speakers, leadership development opportunities, and

unparalleled networking with colleagues from across the country and beyond.

**Register early and save!**

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

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## **GFOA 2025 Annual Governmental GAAP Update December Encore.**

**December 17, 2025 | 1 - 5 p.m. ET**

### **Highlights of 2025 GAAP Update:**

- In-depth discussion of the biggest change to the government financial reporting model in quarter-century: GASB Statement No. 103, *Financial Reporting Model Improvements*
- Forewarned is forearmed! Other GASB statements you are implementing NOW or will be VERY SOON!
- GASB Statement No. 102, *Certain Risk Disclosures*
- GASB Statement No. 104, *Disclosure of Certain Capital Assets*
- Implementation Guide Update—2025 with lots of key interpretations for GASB Statements 100, *Accounting Changes and Error Corrections*, GASB 101, and GASB 103!
- Any minute now: Anticipated GASB Statement No. 105, *Subsequent Events*

A new campaign against an old problem: SPECIAL FEATURE: **Accounting and Financial Reporting for Capital Assets Acquired and Held for Sale**

Defending your perimeter: Getting ready for your upcoming financial statement audit and federal funds Single Audit with our annual audit update

Arming ourselves for the future: Learn about what GASB has in store for the future

### **Learning Objectives**

Those who successfully complete this series should be able to:

- GFOA's expert technical staff and guest speakers will help you to:
- Learn how to implement soon-to-be-effective pronouncements
- Obtain an understanding of standards that you will need to implement soon
- Prepare for your government's upcoming independent financial statement and federal funds Single Audits
- Identify successful strategies for attracting and retaining accounting and auditing leadership and staff

### **REGISTER**

Member Price: \$200.00

Non-Member Price: \$230.00

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## **GFOA Webinar Replay: Implementing "No Tax on Overtime" for Government Employers**

The Internal Revenue Service (IRS) published guidance for employees to deduct qualified overtime compensation from federally taxable income, also known as "no tax on tips," beginning in 2025. This new, temporary deduction will have significant implications for government finance officers as governmental entities are one of our nation's largest employers and adhere to a combination of federal, state and local regulations on overtime pay.

[Watch the replay.](#)

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## **Preparing an Annual Comprehensive Financial Report: A Detailed Walk-Through - GFOA Webinar**

**January 9, 16 & 23, 2026**

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.

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## **Muni Bonds in 2026: What City Leaders Need to Know - NLC/BAM Webinar**

**Dec 9th, 2025, 3:00 PM - 4:00 PM**

2025 will be the second year in a row with record sales of municipal bonds to finance public buildings, roads, water and sewer utilities and other essential public infrastructure. What's driving the sudden surge, and what's ahead for cities that are planning to tap the market in 2026?

Get a full update and bring your questions when NLC and BAM Mutual, which guarantees more than \$135 billion of municipal bonds for 6,000 communities nationwide, host a panel of market experts to discuss the market outlook.

[Click here](#) to register.

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## **GFOA Annual Conference.**

**Dates:** June 28-July 1, 2026

**Location:** McCormick Place Lakeside Center, East Building, Chicago, Illinois

GFOA's Annual Conference is the premier event for public finance professionals across North America. In 2026, thousands of leaders and practitioners will come together in Chicago for four days of learning, collaboration, and connection.

With 80+ education sessions, inspiring keynotes, interactive discussions, leadership workshops, and unmatched networking, this is more than a conference—it's a community of professionals committed to excellence, transparency, and public service.

Join us to learn, connect, and lead the future of government finance.

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

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## **Bloomberg Bquant Webinar: Muni New Issue Performance**

**December 2 & 3, 2025**

There are many reasons investors buy new municipal bonds in the primary market — availability, index tracking, and potential performance among them. If performance is a key concern when evaluating new issues, Bloomberg has released a new BQuant app that helps track primary-market performance. The app sets unique start-dates (date of issuance) and user-defined end-dates to measure yield changes, then tenor-matches a benchmark to compare its yield change over the same period.

Join us to walk through how the app works and, in conjunction with the Bloomberg Terminal, explore factors that have driven past performance and potential use cases for clients.

### **What you'll learn:**

- How to set up new-issue cohorts and unique start/end-dates in BQuant
- Tenor-matching to benchmark yields for apples-to-apples comparisons
- Interpreting primary vs. benchmark yield changes over custom windows
- Practical workflows that combine the BQuant app with Terminal functions

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

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## **NFMA Advanced Seminar on High Yield Bonds.**

The NFMA will meet at the Vdara Hotel & Spa in Las Vegas on **January 22 and 23, 2026** to discuss high yield securities. Topics to be covered include:

- Charter School Trends, Strengths, & Headwinds
- Construction Risk in Senior Living & Beyond
- Municipal Utility District Receivables
- High Yield Muni Analyst Scrum
- Brightline
- Fireside Chat: High-Yield Trader & Portfolio Manager

- Municipal Collateralized Bond Obligations
- Challenges Facing Hospitals

To register, [click here](#).

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## **[2026 National Association of Counties Legislative Conference.](#)**

**Feb. 21-24, 2026 | Washington, D.C.**

The NACo Legislative Conference brings together nearly 2,000 elected and appointed county officials to focus on federal policy issues that impact counties and our residents.

[Event Details](#)

[Register](#)

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

The NFMA is accepting registrations for the 2025 Introduction to Municipal Bond Credit Analysis to be held **November 13 & 14 in Philadelphia**.

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

To register, [click here](#).

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

The NFMA is accepting registrations for the 2025 Introduction to Municipal Bond Credit Analysis to be held **November 13 & 14** in Philadelphia.

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

To register, [click here](#).

**National Federation of Municipal Analysts**

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## **[Coming Up: NFMA Advanced Seminar on High Yield Bonds](#)**

The NFMA will meet at the Vdara Hotel & Spa on **January 22 and 23, 2026** to discuss high yield securities.

Save the dates and watch for registration to open in early November.

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## **Fundamentals of EPC Contracts for Energy Projects.**

**November 4 - 12, 2025 | 12:00pm - 3:00pm Eastern**

Engineering, procurement, and construction contracts (EPC contracts) are utilized for the development of power and energy projects. Energy projects involve significant risks that must be allocated between project owners and contractors. Failure to adequately plan for and manage potential mishaps during energy project construction can lead to costly litigation. Counsel must understand these risks and identify essential rights and responsibilities throughout project construction to effectively avoid and manage claims from engineering, procurement, and construction (EPC) contracts.

Walk through the essentials in building an appropriate contract for each project, from understanding the different contracting models and delivery systems to incorporating performance standards, limitations of liability, available remedies, and more. Investigate the various challenges that arise in energy project construction and effective methods to avoid and mitigate claims, contract disputes, and litigation. Also discuss what to do should a dispute arise, including the key mechanisms in preparing, negotiating, and resolving claims.

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

**American Public Power Association**

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## **Reminder and Early Registration Discount Deadline for GFOA's Annual Governmental GAAP Update Encore.**

GFOA's Annual Governmental GAAP Update Encore is taking place on **December 17, 2025**.

Register by **November 14** to save with the early registration discount.

[Click here](#) to register.

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## **Novogradac 2025 Housing Tax Credit Finance Conference.**

**Four Seasons Hotel Las Vegas | December 4, 2025 to December 5, 2025**

Join industry leaders at the Novogradac 2025 Housing Tax Credit Finance Conference, Dec. 4-5 at the Four Seasons Las Vegas. This two-day event brings together professionals involved in the financing and development of affordable housing, including developers, investors, syndicators, and lenders. Attendees will gain timely insight into low-income housing tax credit (LIHTC) policy updates, innovative financing strategies and best practices in affordable housing development.

In addition to expert-led panels and discussions, the conference offers valuable networking opportunities with key players in the affordable housing industry. Don't miss your chance to connect, learn and stay ahead in the evolving world of housing tax credit finance.

Please contact [events@novoco.com](mailto:events@novoco.com) or 415-356-7970 if you have further questions or need assistance with registration.

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

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## **[Novogradac 2025 Fall New Markets Tax Credit Conference.](#)**

**The Roosevelt New Orleans | October 23, 2025 to October 24, 2025**

This annual event provides a platform for industry leaders, investors, developers and policymakers to explore what's ahead for the new markets tax credit (NMTC) incentive and how to leverage it for lasting community impact. Attendees will gain timely insights on regulatory updates, proven financing structures and current deal flow in the NMTC space. The conference provides practical advice and strategic insights for both experienced professionals and newcomers to enhance their next transaction.

Take advantage of dedicated networking breaks and an evening reception to connect with fellow professionals in the community development field. These informal settings offer opportunities to share strategies, discuss policy challenges and strengthen your advocacy toolkit-especially as the industry rallies around the push to extend and ultimately make the NMTC permanent.

Please contact [events@novoco.com](mailto:events@novoco.com) or 415-356-7970 if you have further questions or need assistance with registration.

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

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## **[Novogradac 2025 Fall Renewable Energy Tax Credits Conference.](#)**

**Fairmont Washington D.C. | November 6, 2025 to November 7, 2025**

Connect with professionals driving progress in renewable energy finance during our fall renewable energy tax credits conference. Attendees will gain timely insights into the evolving landscape of clean energy incentives, with discussion centered around policy developments, market trends and practical approaches to structuring deals.

Whether you're an investor, developer, consultant or advocate, this event offers a valuable opportunity to expand your network and stay informed on the latest in renewable energy tax credit financing. Take advantage of in-person conversations with key stakeholders and peers working to advance clean energy projects nationwide.

Please contact [events@novoco.com](mailto:events@novoco.com) or 415-356-7970 if you have further questions or need assistance with registration.

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

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## **Novogradac 2025 Opportunity Zones Summit.**

**Four Seasons Hotel Las Vegas | December 3, 2025 to December 3, 2025**

Join us during this one-day summit to hear from qualified opportunity fund (QOF) managers, investors, developers, attorneys and Novogradac accountants with valuable marketplace knowledge, actionable strategies, and networking opportunities equipping you to navigate the evolving Opportunity Zones (OZ) landscape.

Whether you're an experienced investor seeking new opportunities or a community advocate striving for equitable development, this summit offers a unique opportunity to chart the course for future success with this powerful economic tool.

Please contact [events@novoco.com](mailto:events@novoco.com) or 415-356-7970 if you have further questions or need assistance with registration.

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

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## **Novogradac 2026 New Markets Tax Credit Conference.**

**Hilton San Diego Bayfront | January 22, 2026 to January 23, 2026**

The permanent extension of the new markets tax credit (NMTC) marks a new chapter for community development. Join Novogradac and industry leaders in San Diego to explore how permanence will reshape deal structures, enhance investor confidence and support the continued growth of long-term planning in underserved communities.

Network with developers, investors, community development entities (CDEs) and policymakers from across the nation as we chart the path forward in this new era of certainty for NMTC.

Please contact [events@novoco.com](mailto:events@novoco.com) or 415-356-7970 if you have further questions or need assistance with registration.

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

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## **Novogradac 2026 Affordable Housing Developers Conference.**

**Conrad Fort Lauderdale Beach | January 15, 2026 to January 16, 2026**

Industry leaders in affordable housing development are invited to engage in discussions on current strategies and opportunities within the affordable housing sector. The recent permanence of the low-income housing tax credit (LIHTC) provisions has enhanced planning predictability for developers, making this an opportune moment to examine financing models, compliance protocols and innovative methods for increasing housing supply.

Attendees will gain practical knowledge, hear updates on legislative and regulatory changes, and build connections with professionals from across the country who are shaping the future of affordable housing development.



Please contact [events@novoco.com](mailto:events@novoco.com) or 415-356-7970 if you have further questions or need assistance with registration.

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

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## **[Google Public Sector Summit 2025](#)**

**October 28, 2025 - October 29, 2025 | Washington, D.C.**

For government leaders and IT professionals, the Google Public Sector Summit 2025 is a must-attend event. Join us in defining the future of innovation, and see how Google Public Sector, partners, and peers are building the future of the public sector and using AI to drive that change. Learn about cutting-edge products such as the newly-launched Gemini for Government that harness the power of Google's AI-optimized and accredited commercial cloud with robust controls and security compliance protocols. Experience the power of the latest technologies through our hands-on labs and workshops. Set forward with a vision for where AI and Security can take you next.

[Register](#)

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## **[GFOA'S 7th Annual MiniMuni Conference.](#)**

**October 21, 22 & 23, 2025 | 1-4 p.m. ET**

### **Details:**

The 7th Annual MiniMuni Conference is GFOA's premier municipal bond education event for finance professionals who work in debt issuance and management. The conference allows attendees to spend virtual time delving deeply into the world of municipal finance in a short time frame (hence the title!). Attendees can expect to hear from advanced practitioners, leading experts, and regulators on a range of topics that impact municipal issuers today. Whether attendees are new to debt management or decades into their career, there are panels for everyone over the course of three days. Topics range from introducing the most popular tools for achieving savings to the best practices for enhancing issuer disclosure practices.

### **Learning Objectives:**

- Apply best practices in preparation for entering the bond market for the first time, such as how to assemble the best deal team and disclosure considerations.
- Assess the impact of recently passed federal tax legislation and other executive actions on the municipal bond market and your own fiscal scenarios.
- Analyze the potential for emerging technologies and the thresholds of cybersecurity risks for governments issuing municipal securities.
- Gain a better understanding of the savings tools that are available to issuers, from regular taxable refundings to tender refundings.
- Hear from industry regulators on what is coming down the pipeline that will impact issuers and other members of a deal team.

Member Price: \$150.00

Non-Member Price: \$200.00

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

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## **Preparing Municipal Bonds to Support Infrastructure for Natural Disasters: NLC Webinar**

**Oct 13th, 2025, 2:00 PM - 3:00 PM | Webinar**

Natural disasters like wildfires, floods, and hurricanes can devastate communities and the infrastructure projects they rely on. For cities, towns and villages this creates additional risks when these projects are financed using municipal bonds as the debt remains no matter if infrastructure is delayed or destroyed.

Join the National League of Cities in speaking with city and thought leaders for a discussion on how to prepare bond funded projects against natural disasters. We'll review findings from recent events and learn more from municipalities on their strategies in preparing their bond funded projects for unforeseen challenges.

[Register Now](#)

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## **Orrick: Conversations with Leaders Driving Innovation in Public Finance and Infrastructure**

**Conference | September.29.2025 - September.30.2025**

**Boston Marriott Long Wharf**

As infrastructure needs and costs rise, public finance leaders are adapting to new policies, technologies, and investment demands. The Bond Buyer Infrastructure Conference, co-chaired by Orrick's Christine Reynolds, brings together experts to explore innovative financing strategies for transportation, housing, water and wastewater facilities, airports, hospitals, universities, and more. Attendees will gain insights from investors and policymakers, learning how to build smarter, stronger infrastructure in a rapidly changing environment.

Matthew Neuringer will speak on the panel "*AIAI P3 Bootcamp: Determining Your Project Delivery Options*," guiding participants through the legal, financial, and operational factors that influence project delivery decisions and identifying when specific models are most effective. He will also moderate the "*P3 Market Growth - Opportunities, Challenges, and Incentives*" panel, where industry leaders will discuss the expanding role of private capital in infrastructure projects, highlight emerging opportunities, and address challenges and incentives in the market.

Devin Brennan will moderate the "*Transit: Ridership and Raising Revenues*" panel, which will focus on how transit agencies are responding to the ongoing challenges in U.S. cities, including declining ridership and the need for sustainable revenue streams. This session will offer practical insights into strategies for maintaining and improving transportation infrastructure amid shifting demands and

financial pressures.

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## **[American Public Power Association Legal & Regulatory Conference, 2025](#)**

Join us **October 12 - 15 at the Manchester Grand Hyatt San Diego in San Diego, California** for an unparalleled professional development opportunity where policy and practice take center stage. Connect with public power's policy experts, and get updates and insights on the ever-changing legal and regulatory landscape confronting public power utilities — from the latest at FERC to practical legal issues facing municipal utilities.

*NOTE: Attendees can earn up to 12 CLEs (in 60-minute states) or up to 14.4 CLEs (in 50-minute states) for attending the conference, and 3.25 CLEs (in 60-minute states) and 3.9 CLEs (in 50-minute states) for each preconference seminar. Please note that the number of CLE credits varies by states and is decided by each state CLE authority.*

**[REGISTER](#)**

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## **[APPA Resilience Webinar: Helping Public Power Tackle Wildfire Risk](#)**

### **Event Overview**

Wildfire and extreme heat events are growing threats to electric utilities, affecting infrastructure, reliability, workforce safety, and customer service. To help public power utilities proactively plan for these risks, Argonne National Laboratory (ANL) and the American Public Power Association (APPA) have partnered to provide targeted technical assistance to five utilities through a wildfire risk mitigation planning initiative.

This webinar will showcase lessons learned from the participating utilities and introduce new planning resources developed through the project, including APPA's wildfire mitigation plan template and strategies guide. Speakers will demonstrate how utilities can use ClimRR, Argonne's climate data platform, to inform near-term wildfire planning and incorporate localized projections into their risk management strategies. Whether your utility is just beginning to assess wildfire risk or looking to enhance existing mitigation plans, this session offers actionable insights, peer-tested tools, and a data-informed planning framework tailored to the needs of public power.

### **Webinar Topics:**

- Overview of Argonne and APPA's wildfire and extreme heat technical assistance project
- How ClimRR supports utility-specific wildfire risk planning
- Walkthrough of APPA's wildfire mitigation plan template and strategies guide
- Utility experiences and lessons learned from wildfire mitigation planning

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

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## **Best Practices in Debt Issuance and Management: GFOA eLearning Course**

**December 9, 10 & 11 2025 - 1-5 pm ET**

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

**Who Will Benefit:** An entity's debt management program staff or those interested in public finance debt best practices

### **Learning Objectives:**

- Identify key challenges facing government in the area of debt management
- Learn how to develop appropriate debt management policies and procedures based on the best practices
- Review current market conditions, trends, and practices
- Learn how to evaluate if issuing debt is the right option for your local government
- Review the relationship between debt financing and the organization's capital improvement plan
- Learn the different types of debt and financing instruments available for local governments
- Gain an understanding of the bond issuer's responsibilities before, during, and after bonds are sold, including managing relationships with external resources and disclosure requirements
- Evaluate the different types of fees charged in a bond transaction
- Learn how to comply with continuing disclosure, securities law, and tax law requirements

Member Price: \$475.00

Non-member Price: \$900.00

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

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## **GFOA: GAAP Update Early Discounts Available**

GFOA's Annual *GAAP Update* is a must for public sector accountants and auditors. Get up to speed on key GASB changes, including GASB 103 and updates on 102, 104, and upcoming standards. Plus, don't miss a preview of GASB 105, *Subsequent Events*, and a Special Feature on Accounting and Financial Reporting for Capital Assets.

Join us online November 6 or December 17 to earn 4 CPE credits and stay audit-ready. Register early to save!

[Read more](#)

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## **Identifying Component Units: GFOA Webinar**

**September 25, 2025 | 1 p.m.-2:30 p.m. 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.

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## **Disclosure Update: GFOA Webinar**

**September 11, 2025 | 1 p.m.-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.

### **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

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

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## **NASACT Webinar: Fraud in the School District - A Case Study**

**10/7/2025 2:00 PM EDT**

School districts are central to communities around the nation and are tasked with an important mission: educating the next generation. Often, resources are limited and districts must ensure that funds are protected and used effectively. Unfortunately, fraud in school districts does occur, and the impacts can be felt for years after.

In this webinar, the FBI special agent responsible for investigating a fraud scheme that lasted several years, and even included leveraging a position in a local church, will share insights on the case.

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

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## **Public Utility Accounting: APPA Webinar**

**September 16 - 18, 2025 | 12:00pm - 3:00pm Eastern**

Part one of the three-part Accounting Fundamental Series. Learn the basics of how the electric utility business works, get a grasp on the ins-and-outs of FERC accounting, and review practical examples of how you can use the FERC USoA.

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

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## **GFOA: Tracking the 2025 One Big Beautiful Bill Act**

On July 4, the "One Big Beautiful Bill Act" (OBBBA) was signed into law. GFOA is continuing to assess the implications of the budget reconciliation bill. While GFOA members' advocacy efforts - including telling your stories at [www.builtbybonds.com](http://www.builtbybonds.com) - resulted in the full preservation of tax-exempt municipal bonds, there are several other provisions of note. Below is the Federal Liaison Center's initial assessment of new tax provisions and key changes to the existing tax code, many of which directly affect state and local governments.

[Continue reading.](#)

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## **NFMA Introduction to Municipal Bond Credit Analysis.**

The NFMA is accepting registrations for the 2025 Introduction to Municipal Bond Credit Analysis to be held **November 13 & 14** in Philadelphia.

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

To register, [click here](#).

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## **NFMA Advanced Seminar on Housing.**

Topics have been announced for panels at the NFMA's upcoming Advanced Seminar on Housing to be held on October 16 and 17 at the Pasea Resort & Spa, Huntington Beach, California.

Registration is open for NFMA members and other industry professionals.

[View the full list of topics.](#)

To register, [click here](#).

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## **Avoiding the Potential Pitfalls in Bond Deals: CDEFA // BNY Development Finance Webcast Series**

**October 21, 2025 | 2:00 PM - 3:00 PM Eastern**

**Session Focus:** While bonds are often considered safer investments, they are not without risks. Panelists will share what you need to know to avoid a bond deal falling through due to a variety of reasons, ranging from issuer defaults and economic downturns to changes in interest rates, inflation, and political instability.

**Key Takeaways:** Understanding why bond deals might fail is essential to leveraging these tools effectively. Attendees will learn about the various risks associated with bond financing and how to mitigate these from the offset.

### **Moderator(s)**

- **Katie Moriarty**, Director, Council of Development Finance Agencies
- **Anthony Schexnayder**, Senior Vice President Relationship Management, The Bank of New York Mellon

[Click here](#) to register.

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## **Registration for NFMA Advanced Seminar on Housing is Open.**

Topics have been announced for panels at the NFMA's upcoming Advanced Seminar on Housing to be held on **October 16 and 17** at the Pasea Resort & Spa, Huntington Beach, California.

Registration is open for NFMA members and other industry professionals.

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## **GFOA GAAP Update Registration Opens.**

GFOA's Annual Governmental GAAP Update is the must-attend online event for public sector

accountants and auditors. Whether you're preparing for year-end reporting or want to stay informed on the latest GASB changes, this session delivers essential updates and key insights. Don't miss your chance to participate.

**Choose from two dates: November 6 or December 17.**

[Read more](#)

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## **2025 California Economic Summit.**

**October 21-23 | Stockton, CA**

The California Economic Summit is a dynamic, solutions-driven gathering where leaders from across the state come together to support economic advancement strategies that are regions-up and focused on the growth and stewardship of California's valuable communities, land, and resources. In 2025, we are thrilled to connect with leaders in Stockton and showcase all that the Northern San Joaquin Valley has to offer, including manufacturing, clean energy, transportation and logistics, agriculture, and more! This is the place to connect, collaborate, and drive change.

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

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## **Evolving Bond Trends: CDFA & BNY Talk Bond Ratings, Benefits for Investors and Issuers**

During this installment of the CDFA // BNY Development Finance Webcast Series, panelists discuss evolving trends in credit evaluations and how these developments can improve the accuracy, timeliness, and comprehensiveness of ratings to the benefit of both investors and issuers.

[Continue reading.](#)

CDFA | Jul. 17

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## **GFOA's 2025 GAAP Update.**

GFOA's Annual Governmental GAAP Update is the must-attend online event for public sector accountants and auditors.

Whether you're preparing for year-end reporting or want to stay informed on the latest GASB changes, year after year, this session delivers essential updates and key insights. Don't miss two opportunities to participate in 2025.

- **November 6 | 1:00 PM - 5:00 PM (Eastern) | 4 CPE Credits**
- **December 17 (encore) | 1:00 PM - 5:00 PM (Eastern) | 4 CPE Credits**

As in past year, this year's broadcast will use 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. Earn four CPE credits with your participation.

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

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## **Tax Compliance for Debt Issuers: GFOA Webinar**

**August 7, 2025 | 1 pm - 3 pm ET**

### **Details:**

Governments that issue debt must comply with numerous federal laws at the time of issuance and over 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.

**Who Will Benefit:** Finance directors, treasury department directors, debt department directors, finance staff

### **Learning Objectives:**

- Be aware of the numerous federal tax laws and regulations imposed on tax exempt bonds.
- Know how to manage key tax issues such as arbitrage calculations and private use restrictions.
- Gain tools to have appropriate policies and procedures in place to ensure overall compliance with tax regulations and possible IRS audit inquiries.

Member Price: \$95.00

Non-member Price: \$200.00

[Register](#)

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## **Don't Pay It Back: How to Fix ARPA Reporting Before It's Too Late - NLC Webinar**

Hundreds of municipalities risk losing their American Rescue Plan Act (ARPA) State and Local Fiscal Recovery Funds (SLFRF) due to noncompliance with federal reporting requirements.

Join the U.S. Department of the Treasury and the National League of Cities for a critical webinar on **Thursday, June 12 at 1 PM ET.**

This session is designed for local governments that have not yet submitted their annual Project and Expenditure Report.

Treasury officials will walk through how to complete the report, common reporting errors, and how to get back into compliance before the portal closes. There will be time dedicated to a live Q&A.

[Click here](#) to register.

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## **[Tax Increment Financing: The Good, The Bad, and the Incremental - GFOA Webinar.](#)**

### **Details:**

This brief introduction to tax increment financings (TIFs) will explore the analytical and financial management practices that a community can employ to ensure a TIF meets its financial and economic development objectives. Through presentation of case studies from Washington, DC and Baltimore, MD, speakers will discuss what makes a TIF successful, the perils of TIFs, and key concepts to consider when starting or improving a TIF program.

### **Learning Objectives:**

- To gain an understanding of the benefits, risks and financial commitments associated with Tax Increment Financing.
- To be familiar with examples of the financial structuring and management of TIFs.
- To understand the basics of whether and how a TIF meets your community's objectives.

Member Price: \$50.00

Non-member Price: \$100.00

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

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## **[GFOA Utility Finance Forum Online Networking Event - Benchmarking & KPIs](#)**

**July 23, 2025 | 3 p.m.-4 p.m. ET**

### **Details:**

Join other Utility Finance Forum members for our online networking event! Participants will have the opportunity to discuss multiple topics with other forum members in breakout rooms. Bring your questions and be ready to share your feedback with others!

This online networking event will be a follow-up to our June webinar covering the topics of Benchmarking & KPIs. Sign up for both and share your experience with fellow Utility Finance Forum members!

Member Price: Free

Non-member Price: Free

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

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## **Examining Concentrations and Constraints for GASB 102: GFOA Webinar**

**July 24, 2025 | 1 p.m.-2 p.m. ET**

### **Details:**

Under Governmental Accounting Standards Board Statement No. 102, Certain Risk Disclosures, governments are now tasked with evaluating a variety of concentrations and constraints impacting their governments for possible disclosure. The existence of a concentration or constraint itself does not immediately trigger a disclosure. This webinar will cover the components to the analysis and also walk through the disclosure requirements set forth by GASB 102 and walk through sample disclosures.

### **Learning Objectives:**

- Summarize the disclosure requirements from GASB 102.
- Identify examples of concentrations and constraints for evaluation.
- Apply insights from sample disclosures.

Member Price: \$50.00

Non-member Price: \$100.00

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

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## **NASBO 2025 Introduction to State Budgeting Seminar.**

**August 13-15 | Indianapolis, Indiana**

Registration will close on July 25.

At this time, registration is reserved for NASBO members only. If seats remain available closer to the meeting date, employees from other government entities will be able to register. For questions, contact Meagan Rhodes at [mrhodes@nasbo.org](mailto:mrhodes@nasbo.org).

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

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## **Novogradac 2025 Spring New Markets Tax Credit Conference.**

**June 5, 2025 to June 6, 2025 Fairmont Washington D.C.**

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

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## **Novogradac 2025 Housing Tax Credit and Bonds Conference.**

September 25, 2025 to September 26, 2025 Grand Hyatt Nashville

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

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## **L.A. Fires Expose Long-Standing Local and National Water Infrastructure Challenges: Brookings Podcast**

- While the visible destruction to homes, businesses, and livelihoods has understandably garnered most of the attention, the Los Angeles fires are also a reminder of the struggles to recognize and reinvest in the country's water infrastructure.
- Nationally, more than \$744 billion is needed to address all the drinking water and wastewater improvements needed over the next two decades, from fixing leaking pipes to upgrading treatment plants.
- Climate resilience districts can bring together local governments and other service providers into one unit at a greater scale to fight a range of climate hazards.

[Listen to Podcast](#)

### **The Brookings Institution**

by Gregory Pierce, Joseph W. Kane, and Robert Puentes

May 7, 2025

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## **Are Sanctuary Jurisdictions a Credit Risk?**

### **Summary**

In this week's episode of Parsing Immigration Policy, guest host Jessica Vaughan, the Center's director of policy studies, discusses the intersection of immigration policy and municipal finance with Ed Grebeck, a veteran credit market risk expert. About one-third of all municipal bonds issued in 2024 and outstanding through 2024 are from sanctuary jurisdictions, concentrated in large cities and states, such as California, New York, and Massachusetts.

Vaughan and Grebeck explore the fiscal implications of sanctuary policies and the need for comprehensive risk assessment in municipal finance. The absence of truly objective bond ratings or comprehensive risk assessments for sanctuary jurisdictions may place investors, particularly individual investors, who own a significant share of this market, at a disadvantage. Sanctuary policies can impose significant burdens on taxpayers, potentially affecting a municipality's fiscal health and its ability to meet financial obligations. Key discussion points include:

- Why are credit ratings important?
- Do sanctuary policies compromise a city's creditworthiness?
- Why might credit rating agencies overlook political risks associated with sanctuary jurisdictions?
- How does the influx of illegal immigrants strain public resources and affect taxpayers?
- Would legislative measures, like Rep. Nancy Mace's "No Tax Breaks for Sanctuary Cities Act", address these concerns?

In the closing commentary, Vaughan presents the findings from her most recent report on sanctuary jurisdictions, identifying the states and localities that have the most egregious non-cooperation policies leading to the release of tens of thousands of criminal aliens.

[Listen to podcast.](#)

## **Center for Immigration Studies**

### **Parsing Immigration Policy, Episode 203**

**By Jessica M. Vaughan and Ed Grebeck on May 8, 2025**

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## **[Federal Budget Legislation Update and Impact to Local Governments: NLC Webinar](#)**

**Jun 3rd, 2025 | 4:00 PM - 5:00 PM**

The White House and the Congressional Majority have used the first 100 days of the New Administration to advance the Trump/Vance agenda on federal spending. Four major proposals aimed at federal tax policies and spending programs could result in significant changes to the federal-local partnership and other shared responsibilities that currently exist between federal, state, and local governments. Join NLC's Federal Advocacy team as they discuss how local governments should navigate the federal landscape and how to mobilize on the top local priorities that are at stake.

[Click here](#) to register.

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## **[AI Is Coming in Hot to Muniland: Bloomberg Masters of the Muniverse](#)**

Though we've covered the coming (and in some ways already here) technology revolution for the municipal space in many prior episodes, our latest focuses more on the practical application of Artificial Intelligence. In other discussions with vendors, AI has been used to help scale businesses to prime them for growth. In this instance, AI is being used to hopefully generate alpha and provide an edge to the market.

In this episode of Masters of the Muniverse, Eugene Grinberg, CEO and co-founder of SOLVE, joins Bloomberg Intelligence's Eric Kazatsky and Karen Altamirano.

[Listen to podcast.](#)

Apr 28, 2025

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## **[BondingTime Podcast with Bond Dealers of America and CDEA.](#)**

The BDA's most recent episode of Bonding Time features a discussion with Toby Rittner of the

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

- The current situation on the Hill and the timing for the tax cut extensions;
- A discussion on PABs including the CDFA and BDA work on the MAMBA legislation; and
- Whats the next step on the Hill? And what has the CDFA been focusing on during advocacy efforts?

[Listen to podcast.](#)

Apr 22, 2025

13 min 16 sec

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## **[CDFA // BNY Development Finance Webcast Series: Risk Management and the Bond Credit Rating Evolution](#)**

**Tuesday, July 15, 2025 | Tue 2:00 PM - 3:00 PM**

**Session Focus:** The evolution of bond credit ratings is shaped by technology advancements, global economic shifts and social factors, and the need for better transparency and regulatory compliance. Panelists will share their perspectives on how these changes reflect a broader trend toward a more dynamic and complex understanding of creditworthiness, allowing markets to function more efficiently and effectively and provide more nuanced and reliable credit risk assessments.

**Key Takeaways:** Attendees will gain an understanding of practical adaptations to improve the accuracy, timeliness, and comprehensiveness of ratings, benefiting both investors and issuers.

**Moderators:**

Katie Moriarty, Director, Council of Development Finance Agencies

Troy Pitman, Vice President, Relationship Management, The Bank of New York Mellon

[Click here](#) to register.

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## **[GFOA Utility Finance Forum Quarterly Webinar: Enhancing Utility Performance through Effective Benchmarking and Storytelling](#)**

**June 11, 2025 | 1 p.m.-2 p.m. ET**

**Details:**

Join us for an insightful webinar where we delve into key performance indicators (KPIs) to understand how your utility stacks up against others. We'll explore the importance of benchmarking and how technology can enable more efficient data collection and analysis. Our panel discussion will feature examples of successful benchmarking practices and the criteria for selecting benchmarks. We'll also discuss the significance of storytelling in conveying complex data to the average customer and the challenges of obtaining consistent and reliable data.

This event is free for Utility Finance Forum members.

**Learning Objectives:**

- Gain an understanding operational and financial KPIs
- Learn how technology is used to enable data collection, analysis and reporting
- Hear how others have implemented their benchmarking and KPIs
- Identify strategies to overcome challenges in data collection
- Improve storytelling by effectively using KPIs and benchmarking

Member Price: \$50.00

Non-member Price: \$100.00

[Register](#)

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## **State Budget Insider: NASBO Webinar**

Join NASBO on **May 20th from 1:00-4:00 pm ET** for **State Budget Insider** for an insider view on current state and territory budget conditions and hot topics.

Attendees will have a unique opportunity to hear from industry professionals in three different sessions with three (3) hours of Continuing Professional Education (CPE) credits available.

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

**National Association of State Budget Officers**

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## **Fitch Ratings & AWWA Symposium 2025**

Join the American Water Works Association (AWWA) and Fitch Ratings for a co-sponsored symposium on **April 30, 2025 from 12:30 pm - 6:30 pm EDT.**

This exclusive afternoon event, "Planning for the Future," will bring together senior executives and leaders from across the water utility and public finance sectors. The dialogue, followed by a networking cocktail reception, will be held at **Fitch Ratings, Hearst Tower, 300 West 57th Street, New York, NY.**

**In this interactive, informative dialogue we will explore:**

- Mounting investment needs to support regulatory requirements continue to outpace funding sources-how can utilities plan for financing future regulatory requirements, as well?
- Data centers are the wave of the future and represent the nexus of water and power needs-what challenges and opportunities do data centers pose for utilities?
- As utilities continue implementing best practices regarding public disclosures, how will interactions and engagement with the investor community evolve in the future?

**The session will include representatives from:**

- The EPA's Water Infrastructure Finance and Innovation Act (WIFIA)
- State Revolving Fund managers
- Water utility leaders
- Investor community

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

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## **Accelerating Your ACFR: Identifying High-Leverage Opportunities with Lean Process Improvement - GFOA Webinar**

**May 8, 2025 | 3 p.m.-4 p.m. ET**

As a local government finance officer, preparing the Annual Comprehensive Financial Report (ACFR) is a critical but time-intensive process. What if you could accelerate its production without sacrificing accuracy or compliance? This webinar explores how Lean process improvement techniques can help you identify inefficiencies and streamline your ACFR workflow.

Using the “8 Wastes Scavenger Hunt” approach, we’ll examine common inefficiencies in the ACFR process through the lens of D.O.W.N.T.I.M.E. (Defects, Overproduction, Waiting, Non-utilized talent, Transportation, Inventory, Motion, and Extra processing). You’ll learn how to spot waste, eliminate bottlenecks, and focus on high-leverage opportunities that can significantly improve your reporting timeline. Join us for this engaging, solution-focused webinar and gain actionable insights from other finance officers to accelerate your ACFR production while improving overall efficiency.

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

**Government Finance Officers of America**

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## **GFOA 2025 Closing Event Announced - NIGHT RANGER!!!**

Enjoy an exclusive night of entertainment at GFOA’s 119th Annual Conference for attendees and guests featuring a performance by Night Ranger, Tuesday, July 1, at The Anthem in Washington, DC! Having sold over 17 Million albums worldwide, performed on over 4000 stages, and captivated a radio audience exceeding one billion, Night Ranger has epitomized and transcended the arena rock sound and style well beyond that era. Their legendary hits include “Sister Christian,” “Don’t Tell Me You Love Me,” “When You Close Your Eyes,” and “(You Can Still) Rock in America.”

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## **Fitch NFP Hospitals Early Median Review Webinar.**

**April 10, 2025 | 12:00pm EDT**

[Register](#)

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## **GFOA SGF Professional Development Webinar: Why Worry About GASB 101?**

**April 16, 2025 | 3 p.m.-4 p.m. ET**



**Details:**

This webinar will focus on the new GASB guidance and how it applies to small governments.

GASB's recent guidance on compensated absences is being implemented by governments with fiscal year-ends December 31, 2024 and later. This recognition and measurement guidance requires governments to estimate a liability for leave that has been earned but not used, including sick leave. The process for determining a "more likely than not" and estimating this liability has stirred a lot of discussion amongst governments.

This webinar is free for GFOA Small Government Forum members.

**Who Will Benefit:** Small Government professionals managing compensated absences and related accounting/reporting

**Learning Objectives:**

- Identify when an organization should recognize a liability for compensated absences
- Identify what information is necessary to measure a compensated absence liability and how to obtain or estimate, if necessary, that information
- Correctly estimate a compensated absence liability

[Click here](#) to register.

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**[Best Practices in Debt Issuance and Management: GFOA In-Person Training](#)**

**April 30 & May 1, 2025 - 8:30 a.m.-4:30 p.m. ET**

**Hyatt Regency Columbus  
350 North High Street  
Columbus, Ohio**

**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.

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## **[NASBO: 2025 Analyst Professional Development Seminar](#)**

**June 11-13 | Niagara Falls, New York**

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

**National Association of State Budget Officers**

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## **[Target Based Budgeting: GFOA Webinar](#)**

Target-Based Budgeting (TBB) helps governments manage finances by setting clear spending limits for core services and letting departments request extra funding for additional needs. It reduces waste, encourages collaboration, and supports long-term financial stability. TBB is a practical tool for improving budgeting and ensuring public funds are used wisely.

[Download Report](#)

### **Upcoming Webinar**

[Click here](#) to register for our **April 16 webinar**, *Target-Based Budgeting: A Strategic Approach for Local Government Finance*

### **Rethinking Budgeting Initiative**

[Click here](#) to learn more about Rethinking Budgeting. Explore core principles, read reports, and get started today on new approaches that lead to better outcomes.

Publication date: February 2025

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## **[Risk Management and the Bond Credit Rating Evolution: CDEA Webcast](#)**

**Tuesday, July 15, 2025 | 2:00 PM - 3:00 PM**

**Session Focus:** The evolution of bond credit ratings is shaped by technology advancements, global economic shifts and social factors, and the need for better transparency and regulatory compliance. Panelists will share their perspectives on how these changes reflect a broader trend toward a more dynamic and complex understanding of creditworthiness, allowing markets to function more efficiently and effectively and provide more nuanced and reliable credit risk assessments.

**Key Takeaways:** Attendees will gain an understanding of practical adaptations to improve the accuracy, timeliness, and comprehensiveness of ratings, benefiting both investors and issuers.

### **Moderators**

- Katie Moriarty, Director, Council of Development Finance Agencies
- Troy Pitman, Vice President, Relationship Management, The Bank of New York

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

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## **How Municipalities of All Sizes Are Building the Financial Stability of Residents: NLC Webinar**

**Webinar | Mar 31st, 2025, 1:00 PM - 2:00 PM**

Join the National League of Cities (NLC) for an informative webinar highlighting NLC's upcoming report: A Decade of Municipal Financial Empowerment Strategies: Findings from a 2024 Field Scan.

NLC, in partnership with the University of Wisconsin-Madison, conducted a field scan of recent developments in financial empowerment strategies in cities, villages, and towns across the United States.

The webinar will reveal findings from the report and feature cities that have successful efforts in place, such as:

- programs to connect residents to public benefits
- strategies to help residents save
- supports for small businesses; and
- access to bank accounts and loans.

Attendees will get first-hand insights into how cities have grown their financial empowerment programming over the last decade, regional differences, and which types of programs are most common. This is an excellent opportunity for NLC members and local government leaders to assess their own efforts and come away with ideas to grow or strengthen programs to support the financial well-being of residents and communities.

Join us from 1 PM to 2 PM (ET) Monday, March 31, 2025, to learn more.

[REGISTER](#)

### **Speakers**

- J. Michael Collins, Professor, University of Wisconsin-Madison
- Heidi Goldberg, Director, Economic Opportunity and Financial Empowerment, NLC
- Patrick Hain, Program Director, Economic Opportunity and Financial Empowerment, NLC

*The Wells Fargo Foundation generously supports NLC's Wells Fargo Financial Empowerment Scan Project that produced the A Decade of Municipal Financial Empowerment Strategies: Findings from a 2024 Field Scan.*

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## **USPF Credit Outlooks 2025: Fitch On-Demand Webinars**

Discover the rationale and insights from Fitch's experts on what's behind their 2025 outlooks for U.S. Community Development and Social Lending (CDSL) and U.S. Municipal Transportation sectors.

[Watch CDSL](#)

[Watch Transportation](#)

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## **[BLX/Orrick 2025 Post-Issuance Compliance Workshop \(NEW!\)](#)**

### **SAVE THE DATE**

BLX and Orrick will be hosting our Post-Issuance Compliance Workshop on **October 23-24, 2025**

This hybrid event will be held virtually and at the Conrad Hotel in Nashville.

More information coming soon. Check back for updates and registration information.

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

For questions and information on the Workshop or the Post-Issuance Compliance Services provided by BLX, please contact:

Alan Bond

[abond@blxgroup.com](mailto:abond@blxgroup.com)

212.506.5275

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## **[The Availability and Impact of Public and Private Funding Following a Natural Disaster: Chicago Federal Reserve](#)**

Natural disasters are shocks to income, wealth, and capital, and over the past few decades, according to federal statistics, the number of natural disasters where losses have exceeded \$1 billion has been increasing. Homeowner's insurance is essential for well-functioning property markets because it enables homeowners to cover the cost of repairs following a natural disaster. Yet home insurance is becoming more expensive, and some insurance companies are limiting plan offerings in some states.

In the aftermath of a natural disaster, community banks have the potential to provide liquidity to homeowners who are uninsured or underinsured. But community banks are less likely to have the capacity to lend after large-scale natural disasters, particularly if they are unable to raise sufficient capital. Do community banks play a unique role in lending in the wake of natural disasters? How has the decline of community banking affected post-disaster recovery and economic growth?

On **Wednesday, March 5, 2025, at 11:00 am CT**, join the Chicago Fed's Economic Mobility Project for **The Availability and Impact of Public and Private Funding Following a Natural Disaster**, a virtual event during which Chicago Fed senior economist Daniel Hartley will present results from three of his studies.

- In "Credit when you need it," Hartley and his co-authors, analyze the impact of emergency credit access on households' finances after a federally declared natural disaster and find that the provision of credit in a time of crisis has effects on consumption, particularly on additional car

purchases. Their findings suggest that well-timed liquidity provided to households in need can have substantial and ongoing positive effects.

- In “Natural disasters, local bank market share, and economic recovery,” Hartley and his co-author look at differences in post-disaster credit allocation and regional redevelopment based on the concentration of local banks following bank deregulation that drastically diminished the role of community banks. They note that savings, credit markets, and insurance are not always sufficient to smooth the negative financial consequences of a natural disaster.
- In “Weathering an unexpected financial shock: The role of federal disaster assistance on household finance and business survival,” Hartley and his co-authors study the financial impact of FEMA individual assistance grants in the wake of a tornado.

The research presentation will be followed by a moderated panel, where scholars and other experts on housing finance, insurance, and credit access will discuss the impacts of the current insurance crisis and potential policy solutions to provide financial stability to homeowners affected by natural disasters.

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

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## **[Risk Management and the Bond Credit Rating Evolution: CDEFA Webinar](#)**

**Tuesday, July 15, 2025 | 2:00 PM - 3:00 PM**

**Session Focus:** The evolution of bond credit ratings is shaped by technology advancements, global economic shifts and social factors, and the need for better transparency and regulatory compliance. Panelists will share their perspectives on how these changes reflect a broader trend toward a more dynamic and complex understanding of creditworthiness, allowing markets to function more efficiently and effectively and provide more nuanced and reliable credit risk assessments.

**Key Takeaways:** Attendees will gain an understanding of practical adaptations to improve the accuracy, timeliness, and comprehensiveness of ratings, benefiting both investors and issuers.

### **Moderator(s)**

- Katie Moriarty, Director, Council of Development Finance Agencies
- Troy Pitman, Vice President, Relationship Management, The Bank of New York

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

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## **[Municipal Broadband and Innovative Financing Models: Unlocking Economic Growth](#)**

**Thursday, February 20, 2025 - 12:00 EST**

### **Virtual Event**

A growing number of communities are supercharging their local economy by building publicly-owned telecommunication infrastructure instead of relying on the expensive, spotty access offered by the regional monopoly or duopoly incumbent(s). Most of the communities who have joined the

expanding public broadband sector were able to finance network construction and operations with little or no federal funds.

This free webinar will primarily focus on how municipal broadband networks can be financed in the context of a now uncertain BEAD program. It will also briefly touch on the cost of doing nothing.

Co-hosted by American Association for Public Broadband (AAPB) Executive Director Gigi Sohn and Sean Gonsalves from Institute for Local Self-Reliance (ILSR) Community Broadband Networks Initiative, the discussion will feature officials and municipal finance experts who have built public broadband networks and have successfully navigated the maze of municipal finance – both from the municipal and private sector side.

**Panelists for the discussion will be:**

- Ernie Staten, City of Fairlawn's Public Service Department Director
- F.X. Flinn, ECFiber Governing Board Chair
- Laura Lewis, Principal and Co-Owner of LRB Public Finance Advisors
- Eric Rex, Vice President at KeyBanc Capital Market

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

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## **Political Landscape of Private Activity Bonds: CDFA Webcast**

**Tuesday, March 18, 2025 | Tue 2:00 PM - 3:00 PM**

**Session Focus:** This session will offer a concise overview of the federal political forces shaping the future of Private Activity Bonds (PABs). Focusing on legislative challenges and opportunities at the national level, panelists will explore the impact of federal tax policies, budget priorities, and political trends on the use and structure of PABs in financing critical public-private infrastructure projects.

**Key Takeaways:** Learn about federal policy trends, the legislative outlook for Private Activity Bonds, and effective advocacy strategies to ensure their continued use in public-private financing.

**Moderator(s)**

Katie Moriarty, Director, Council of Development Finance Agencies

James Young, Senior Vice President | Relationship Manager, The Bank of New York

[Click here](#) to register.

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## **Bonds for Disaster Recovery and Economic Renewal: CDFA Webcast**

**Tuesday, February 18, 2025 | Tue 2:00 PM - 3:00 PM**

**Session Focus:** Bonds for disaster recovery and economic renewal are financial tools used to raise the necessary funds to rebuild and revitalize areas impacted by natural or man-made disasters. Panelists will share their stories on how they utilized disaster recovery bonds to finance recovery efforts, restore infrastructure, and stimulate economic growth in affected areas.

**Key Takeaways:** Attendees will learn about the various bonds leveraged for disaster recovery and how to enable affected regions to recover more quickly and emerge stronger, both economically and socially, by providing capital for infrastructure restoration, economic development, and community resilience.

**Moderators:**

Oreste Casciaro, Senior Vice President, Relationship Management, The Bank of New York  
Katie Moriarty, Director, Council of Development Finance Agencies

**Speaker:**

Caitlyn Burchfield, Partner, Butler Snow LLP  
Adam Parker, Attorney, Butler Snow LLP

[Click here](#) to register.

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## **Market and Credit Rating Outlook: GFOA Webinar**

**February 27, 2025 | 1 p.m.-3 p.m. ET**

**Details:**

This webinar will provide participants with an understanding of current market information and an outlook for future months. Discussion of how the market impacts various debt issuance products will also be discussed. The session will feature industry experts, interactive discussion, and will highlight for finance officers the importance of understanding how market conditions are related to outstanding and future debt issuances.

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

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## **National Federation of Municipal Analysts Annual Conference.**

The NFMA's 2025 Annual Conference will be held at the **Grand Hyatt San Antonio Riverwalk on May 6-9, 2025**. We have an exciting program planned with relevant topics and dynamic speakers.

Consider registering prior to March 1 to take advantage of Early Bird registration.

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

To register, [click here](#).

**National Federation of Municipal Analysts.**

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## **2025 CDEA Federal Policy Conference.**

**April 15-16, 2025 | Washington, D.C.**

## **Uncertainty can cause concern. But it can also provide opportunities.**

Which is why we're hosting the annual CDFA Federal Policy Conference this April 15-16 in Washington D.C. This is your chance to hear from – and be heard by – the people who are influencing the development finance industry at the federal level.

### **A new President. A new Congress. A lot of questions.**

What can we expect from the Trump Administration? What's the future of programs like SSBCI and GGRF? Are Tax-Exempt and Private Activity Bonds in danger of being eliminated? We're going to be talking about these and a number of other topics that we know are important to you and directly impact the development finance work you're doing.

This isn't just a networking conference with informative breakout sessions – it's a chance to literally sit at the table and talk with representatives from the U.S. Departments of Agriculture, Energy, Housing & Urban Development, Transportation, and Treasury, as well as the U.S. Small Business Administration, Environmental Protection Agency, and Economic Development Administration. And it's a chance to join us and your peers in making sure our industry's voice and concerns are heard.

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

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## **[Understanding Public Utility Financial Statements and Operational Ratios: Two-Part Series](#)**

**March 6 - 11, 2025 | 12:00pm - 3:30pm Eastern**

Join this two-part series to learn how to properly analyze and gain insight from ratio metrics and financial statements, communicate that information to decision makers, review trends in public power financial and operating ratios, and how they can inform decisions.

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

**American Public Power Association**

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## **[A Discussion with Treasury's Office of Capital Assets \(formerly Recovery Programs\): Free GFOA Webinar](#)**

With the "ARPA obligation" deadline now past, direct recipients of the State and Local Fiscal Recovery Fund (ARPA) are eager to close activities in Treasury's portal.

Join this free session, **February 3**, to hear directly from Treasury's Office of Capital Access (formerly Recovery Programs) and Compliance Monitoring who will answer questions current Treasury resources for direct and subrecipients of CSLFRF.

[Register](#)



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## **[2024 MSRB Municipal Bond Market In Review Podcast.](#)**

[Listen to the podcast.](#)

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## **[Modernizing California Municipal Reporting Conference.](#)**

After a period of municipal financial stability, California local governments are once again facing fiscal distress. A robust system of municipal financial reporting and monitoring can provide early warnings of fiscal trouble and allow policymakers at the state and local level to proactively address them.

Join California Policy Center and XBRL US for a half-day conference, Modernizing Municipal Reporting, featuring keynote speaker California State Treasurer Fiona Ma, CPA on **January 30, 2025** from 8:45 AM - 1:30 PM in Costa Mesa, CA.

— Learn how the Financial Data Transparency Act (FDTA), federal legislation that calls for municipal bond issuance to be reported in machine-readable format, offers the opportunity to modernize government reporting, giving state and local policymakers the tools to monitor fiscal health.

— Learn about steps the Governmental Accounting Standards Board (GASB) is taking to build open data standards that will express government financials in digital format.

— Find out how standardized, machine-readable financials can be a game-changer to track and identify financial health for cities, counties and special districts. Get insights into practical aspects of the FDTA rollout from public sector accountants and analysts.

Don't miss this opportunity to learn about the potential impact of the FDTA on California governments, and participate in the discussion about how to implement this program efficiently and effectively!

[Register Here](#)

**California Policy Center**

**Center for Public Accountability**

January 7, 2025

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## **[GFOA Webinar: Positive Arbitrage - What You Need to Know](#)**

**January 22, 2025 | 3 pm - 4 pm ET**

### **Details:**

Join GFOA's Small Government Forum for a one-hour professional development webinar focused on positive arbitrage. The speakers from Hawkins will walk the attendees through the basics of positive

arbitrage and how it can impact your local government.

**Who Will Benefit:**

CFO/Finance Director, Budget Manager, Debt Manager

**Learning Objectives:**

- Define positive arbitrage
- Discuss how positive arbitrage can impact your government

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

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**[CDEA-Bricker Graydon Webinar Series: Pairing TIFs with Special Assessments to Spur Retail Revitalization](#)**

**December 3, 2024 | 2:00 PM - 4:00 PM Eastern**

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

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**[The Sustainable Water Investment Summit: Brownstein](#)**

**Palos Verdes Peninsula, USA | 27 - 28 February 2025**

The Sustainable Water Investment Summit (SWIS) delves into the many facets of water finance—from risk management arbitrage and indexing to water transfers, reallocation and supply strategy, to how new water storage opportunities, water infrastructure, demand reduction technology and climate innovation capital will shape new opportunities and challenges in the water sector. SWIS brings together leading investors, state and municipal officials, entrepreneurs, highly water dependent industries, farmers and ranchers, environmentalists, utility managers, planners, developers and professionals—anyone with a passion for critical water resource strategies, solutions and investment. Located at the Terranea Resort, a luxurious oceanfront destination along the Palos Verdes Peninsula, the event is designed to provide ample opportunities to meet and reconnect with colleagues across the water space.

[Register now](#)

**Brownstein Hyatt Farber Schreck LLP**

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**[GFOA 2025 is Open!](#)**

**Join us from June 29-July 2, 2025, at the Walter E. Washington Convention Center in Washington, DC!**

Take advantage of 70+ CPE-accredited sessions, inspiring keynotes, and interactive leadership

workshops designed to expand your expertise in government finance.

[Conference Homepage](#)

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## **[Reminder: GFOA Disclosure Update](#)**

**Webinar | November 20, 2024 | 1 pm - 3 pm 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.

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

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## **[NFMA Advanced Seminar on Critical Infrastructure for Water/Sewer & Public Power Issuers.](#)**

**Save the dates of January 30 & 31 for the next Advanced Seminar to take place in Birmingham, Alabama.**

Planned sessions/topics include:

- Keynote Address by Sunny Wescott, Chief Meteorologist, Department of Homeland Security
  - Fireside Chat with Jefferson County, Alabama
  - Public Power C-Suite Roundtable
  - Climate Resiliency & Water Agency Planning for the Future
  - Optimizing Rates & Affordability
  - Task Force on Nature-Related Financial Disclosure, Disaster Spending Development & Lessons Learned from ESG
  - Utility Mandates to Address PFAS & Energy Demands from the Expansion of Data Centers
  - Renewable Energy Projects: Deal Structure, Financing & Development Challenges
- Prepaid Gas
- 

## **[CDFA Advanced Tax Increment Finance Course.](#)**

**November 13, 2024 | 9:00 AM - 4:00 PM Eastern | Baltimore, MD**

The Advanced Tax Increment Finance Course builds upon curriculum from the Intro Tax Increment Finance Course by focusing more concretely on structuring the deal and developing short- and long-term policies. Attendees will also learn about performance monitoring, feasibility analysis, and using TIF in conjunction with other development finance tools.

This course is taking place as part of CDFA's 2024 National Development Finance Summit. Learn more about the National Summit [here](#).

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

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

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## **[Bond Financing for Manufacturers & Non-Profits: CDFA // BNY Development Finance Webcast Series](#)**

**Tuesday, November 19, 2024 | 2:00 PM - 3:00 PM**

Tax-exempt bond financing offers a powerful tool for manufacturers and 501(c)(3) organizations to fund essential capital improvements at lower interest costs. During this installment of the CDFA // BNY Development Finance Webcast Series, panelists will tap into the core principles of tax-exempt financing for manufacturers and 501(c)(3) organizations, covering key aspects such as eligible issuers, assets, and projects, private business use test, and best practices.

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

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## **[Exploring Common Bond Reserve Funds: CDFA // BNY Development Finance Webcast Series](#)**

**Tuesday, December 17, 2024. | Tue 2:00 PM - 3:00 PM**

Through Common Bond Reserve Funds, development finance agencies can issue tax-exempt or taxable revenue bonds on behalf of private borrowers to provide lower interest rates on long-term financing, providing credit enhancement for businesses and projects in need of affordable rates. During this installment of the CDFA // BNY Development Finance Webcast Series, local practitioners will present their Common Bond Reserve Fund program models to demonstrate the potential of this innovative pathway for increasing access to capital.

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

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## **[Public Utility Accounting Virtual Training.](#)**

**November 6 - 19, 2024 | 12:00pm - 3:00pm Eastern**

Part one of the three-part Accounting Fundamentals Series. Learn the basics of how the electric utility business works, get a grasp on the ins-and-outs of FERC accounting, and review practical examples of how you can use the FERC USoA. Get up-to-speed on how to use the language of the FERC USoA for accounting, how the system is organized, and how it can serve as a reference guide for your work.

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

**publicpower.org**

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## **[Energy As a Service and Municipal Bonds: What You Should Know - Orrick Webinar](#)**

[View the webinar.](#)

**Hosted by The Bond Buyer and Orrick**

October.17.2024

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## **[GFOA 2024 Annual Governmental GAAP Update.](#)**

**GFOA eLearning Course | November 14, 2024 1pm - 5pm ET**

**Participants in the 2024 Governmental GAAP Update will:**

Get last-minute pointers on standards being implemented now, including GASB 100, *Accounting Changes and Error Corrections* and GASB 101, *Compensated Absences*

**Be prepared for upcoming implementations of new GASB Statements, including:**

- GASB 102, *Certain Risk Disclosures*
- GASB 103, *Financial Reporting Model Improvements*
- GASB 104, *Classification of Nonfinancial Assets* [anticipated]

Learn about the [anticipated] Preliminary Views document on Infrastructure Assets on which you can provide comments to GASB

**Get updates about other ongoing GASB standard-setting projects, including several with due process documents expected to be issued in late 2024:**

- Going Concern/Severe Financial Stress
- Subsequent Events
- Implementation Guidance Update for 2025

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

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## **[Curious About Bond Ratings? Don't Miss the Next CDFA // BNY Development Finance Webcast Series!](#)**

[View the Webcast Series.](#)

## **BLX/Orrick 2024 Post-Issuance Compliance Workshop (NEW!)**

**November 21 & 22 | Austin, TX and Virtual**

A Comprehensive Overview of Post-Issuance Compliance 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.

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## **Debt Management Best Practices: GFOA eLearning Course**

**October 28, 29 & 30, 2024 | 1-4:45 pm ET**

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
- Debt Management
- Selecting Municipal Finance Professionals
- Disclosure Practices and Investor Relations
- Financing Instruments and Techniques

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

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## **Preparing and Implementing a Capital Improvement Plan: GFOA In-Person Training**

**September 30 & October 1, 2024**

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

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

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## **GFOA MiniMuni Sessions Announced.**

GFOA's 6th Annual MiniMuni Conference, October 9-11, will provide an opportunity for finance

professionals who work in debt management to hear from leading experts, seasoned practitioners, and regulators on a host of issues that impact municipal issuers. During this virtual event, we'll host eight sessions, offering up to nine CPE credits. Session topics include municipal securities, leveraging partnerships, market dynamics, FDTA, and more.

[View Sessions and Register](#)

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### **[Novogradac 2024 Housing Tax Credit and Bonds Conference.](#)**

**September 26, 2024 to September 27, 2024 | Four Seasons New Orleans**

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

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### **[Novogradac 2024 Historic Tax Credit Conference.](#)**

**October 10, 2024 to October 11, 2024 | InterContinental Kansas City at the Plaza**

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

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### **[Exploring New IIJA Bond Categories: CDFA Webcast](#)**

**Tuesday, September 17, 2024 | 2:00 PM - 3:00 PM**

The Infrastructure Investment and Jobs Act (IIJA) created two new qualified uses for private activity bonds - carbon capture and broadband - yet few projects have successfully made use of these new categories since the IIJA's enactment in 2021. During this installment of the CDFA // BNY Development Finance Webcast Series, panelists will provide an overview of these two new categories and illustrate how they might be better utilized in communities across the country.

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

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### **[2024 California Economic Summit.](#)**

**Registration for the [2024 California Economic Summit](#) is now open! This year's Summit will be held in Sacramento, CA on October 8-10.**

Taking place at SAFE Credit Union Convention Center, the Summit takes a step back to consider the major forces shifting the global economy and how California can and must find new and innovative ways to ensure a more sustainable, resilient, and inclusive future.

We'll provide big-picture context on global trends, then discuss innovative solutions across manufacturing, housing, infrastructure, and energy—all with the core focus on how our diverse and vibrant regions can work together to build a better future for all Californians.

The Summit's opening night reception will be hosted by the Latino Community Foundation and CEO Julián Castro; additional confirmed speakers so far include Dr. Kimberly Budil, Director, Lawrence Livermore National Laboratory; Niilo Edwards, CEO, First Nations Major Projects Coalition; Don Howard, President & CEO, James Irvine Foundation; and Francisco Leon, CEO, California Resources Corporation.

Regional tours and specific breakout session details coming soon—[subscribe to our newsletter](#) for up-to-date information on the program, additional speakers, and more!

**Early bird registration is available until August 31. [Register now](#) to join us October 8-10 in Sacramento!**

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### **[GFOA On-Demand Accounting Courses.](#)**

Introducing three new on-demand accounting courses designed for government finance professionals: ***Generally Accepted Accounting Principles for Grants, Federal Assistance Uniform Guidance (UG), Cost Principles, and Allowable Costs***, and ***Understanding Single Audit***.

Enjoy interactive, engaging, and flexible learning at your convenience. Explore our full on-demand course library for more professional development opportunities.

[Learn More and Register.](#)

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### **[National Association of State Treasurers Annual Conference.](#)**

**Register now for the NAST Annual Conference!**

**September 22-25, 2024 in Chicago, IL**

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

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

**November 21-22 | Austin, TX**

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

The 2024 Workshop will be a hybrid event, with in-person attendance at the Austin Proper Hotel and a livestream option. The in-person option represents an excellent opportunity for attendees to interact and socialize with other attendees, industry professionals, and the BLX and Orrick team. 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 and other attendees throughout the



workshop.

Both the in-person and livestream options will allow participants to replay any of the recorded sessions for up to 30 days after the event.

#### PROGRAM DESCRIPTION

The Workshop offers timely discussions of topics related to post-issuance compliance for the public finance and 501(c)(3) communities who borrow on a tax-exempt basis. With open forums allowing for attendee participation, BLX and Orrick professionals will lead the program with curated and insightful content to assist participants with understanding the IRS and SEC regulations and requirements relating to tax-exempt debt. The sessions encourage audience participation and address questions from participants relating to real life situations. The BLX and Orrick team strives to make the discussion of tedious tax laws understandable and relatable.

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

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### **13th Annual Brookings Municipal Finance Conference: Day One Morning Session**

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 Mitchell E. Daniels Jr. School of Business at Purdue University, and the Harris School of Public Policy at the University of Chicago. The 2024 conference will be held primarily in person - there will be livestream options for remote viewers - on July 17 and 18 at Brookings Institution.

[Watch video.](#)

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### **GFOA's Best Practices Forum Begins July 29.**

Did you know that GFOA has approved over 200 best practice statements that serve as the foundation for financial management practices for all governments to implement? Join us virtually, July 29-August 2, as presenters highlight over 20 individual best practices and provide the latest information on current trends, implementation considerations, and essential practices for all governments.

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

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### **Calling All Water Finance Professionals in Georgia, Carolinas, Southeast U.S.**

**The 2024 Water Finance Conference, a two-day educational seminar for water utility finance executives, is coming to The Water Tower Global Innovation Hub Aug. 6-7, 2024 in Buford, Georgia.**

The [Water Finance Conference](#) convenes executive-level utility professionals, including directors, general managers, CEOs, CFOs and city finance managers along with consultants, financial advisors, legal professionals and service providers involved in financing municipal water, wastewater and stormwater systems. Since 2015, the event has been hosted annually by the journal [Water Finance & Management](#), published by Benjamin Media, Inc., in partnership with the [National Association of Clean Water Agencies \(NACWA\)](#).

The conference is tailored to finance professionals. Leading topics covered include rate studies and water pricing; low-income affordability/customer affordability programs; consolidation/regionalization; Bipartisan Infrastructure Law fund implementation; applying federal funding locally; leveraging Clean/Drinking Water SRFs; and regulatory issues affecting utilities, etc. [Check out the 2024 agenda.](#)

[The Water Tower](#), a first-of-its-kind nonprofit water innovation hub born out of Gwinnett County Department of Water Resources, celebrated its grand opening in April 2022. The \$33.7 million campus is a global hub for water utilities, researchers, companies and other water-related organizations to collaboratively solve critical, real-world water and environmental challenges. The campus features multiple laboratories, a field training center and water technology demonstration areas.

Day 1 on Aug. 6 will conclude with a tour of The Water Tower campus and training centers, followed by an evening reception for attendees sponsored by Kamstrup and USG Water Solutions.

[Click here to register.](#) Registration fees increase \$100 after July 19. Members of these supporting organizations can receive \$200 off via discount code.

The 2024 conference is presented by Main Event Sponsors NACWA, Stantec & Synario, along with sponsors Sustainability Partners, Kamstrup, SmartCover, Wade Trim, Raftelis, MentorAPM and USG Water Solutions.

JULY 2, 2024

BY WFM STAFF

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## **[Reminder: 13th Annual Brookings Municipal Finance Conference](#)**

**Wednesday, July 17 - Thursday, July 18, 2024**

Brookings Institution  
1775 Massachusetts Avenue N.W.  
Washington, DC  
20036

- [Attend in person](#)
  - [Watch Online](#)
  - [Agenda](#)
-

## **Kutak Rock Attorneys to Present Tax Credits and Direct Pay for Clean Energy Webinar.**

On **Thursday, June 20**, Kutak Rock attorneys Fred Marienthal, Matthias Edrich and Allyssa Wall will present their “Tax Credits and Direct Pay for Clean Energy” as a part of the Colorado Housing Finance Authority’s chfareach webinar series.

In this presentation, Fred, Matthias and Allyssa will inform participants about the Inflation Reduction Act and its clean energy credits. Nonprofits, states, tribal governments, local governments and others can take advantage of tax credits through either direct pay or a transfer of credit. Participants will learn about eligibility for these credits, the potential value and the process for claiming the Investment Tax Credit or Production Tax Credit for their projects.

[Click here](#) for more information and to register for the “Tax Credits and Direct Pay for Clean Energy” webinar. The webinar will open at 8:55 am mountain time, and begin at 9 am MT.

[Fred](#) has participated in over 1,000 financings aggregating \$32 billion and focuses his practice on higher education facility financings, P3 financings, conduit private activity bonds, nonprofit facility financings and multifamily housing revenue bonds. He routinely serves as bond, disclosure and underwriter’s counsel on tax-exempt bond financings for public and nonprofit colleges and universities, charter and independent schools, charitable organizations and housing authorities.

[Matthias](#) advises clients on tax structuring of municipal and corporate debt transactions and financing-related section 501(c)(3) exemption matters. He has represented bank lenders and capital markets underwriters, government and corporate issuers, student loan lenders, large hospital systems, housing developers, energy and solid waste recycling companies, manufacturers and various types of section 501(c)(3) nonprofits.

[Allyssa](#) joined the firm after serving as a Term Law Clerk in the Eighth Circuit U.S. Courts of Appeals (2019-2020) and as a Judicial Law Clerk in the North Dakota Supreme Court (2018-2019). Her practice focuses on the equity and debt aspects of complex real estate transactions involving low-income housing tax credits, renewable energy tax credits and numerous other related state and federal financing products including tax-exempt bond financing.

June 17, 2024

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## **GFOA2025 Call for Topics is Open.**

Has your government implemented a best practice? Please consider sharing your case study at the GFOA’s 119th Annual Conference, June 29-July 2, in Washington, D.C. Almost all GFOA speaking panels include practitioners who can discuss current trends, best practices, and issues at the state or local government level.

[Submit Ideas](#)

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## **The Escalating Cybersecurity Crisis: Countering Threats to U.S. Healthcare -**

## **[Orrick / Bond Buyer Webinar](#)**

**Webinar | June.13.2024 | 11am - 12pm (Pacific Standard Time)**

The medical industry is currently grappling with a surge of cyber threats and security incidents that are putting sensitive patient information and essential services at risk. In the United States, the healthcare field has been particularly shaken by a series of recent ransomware attacks targeting prominent healthcare providers. These represent a troubling trend of “havoc-based attacks” with the potential to undermine key components of the nation’s infrastructure.

Join our upcoming webinar where Thora Johnson, Jenna Magan and Devon Ackerman, Global Head of Incident Response at Kroll will examine the challenges posed by these high-profile cyber incidents, the legal landscape, the role of cyber insurance, and other practical strategies to defend your institution against future attacks.

[Register](#)

**Hosted by The Bond Buyer and Orrick**

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## **[Bond Dealers of America National Fixed Income Conference.](#)**

**December 5-6, 2024 | Nashville, Tennessee**

Registration Coming Soon

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## **[Accounting Changes and Error Corrections: GFOA Webinar.](#)**

### **Details:**

Accounting changes and error corrections impact governments regularly. Finance professionals need to be transparent and report the change. However different kinds of changes impact a government’s financial statement reporting in different ways. This session will provide an overview of the accounting and reporting requirements for governments when there are changes to or within the reporting entity, changes in accounting principles, changes in estimates, and corrections of errors. Speakers will emphasize the new display requirements and clarify the requirements for prior periods reported in the Required Supplementary Information (RSI) and Supplementary Information (SI). This webinar will build off of participants’ understanding the government financial reporting model.

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

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## **[Coming Up: NFMA Advanced Seminar on Higher Education](#)**

Now that the NFMA’s Annual Conference has concluded, attention is focused on the Fall Advanced Seminar on Higher Education to be held on **October 17 & 18 at the Omni Shoreham in**

**Washington, D.C.**

A planning committee will be assembled in early June with registration set to commence in August.

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## **[Reminder: 118th GFOA Annual Conference](#)**

**June 9-12, 2024**

**Orange County Convention Center  
9800 International Drive West Building  
Orlando, Florida**

### **Details:**

Registration and housing for GFOA's 118th Annual Conference is now open. The conference will take place on June 9-12, 2024, at the Orange County Convention Center in Orlando, Florida. Join us for 70+ CPE-accredited sessions that will address current issues facing government finance professionals, inspiring keynote sessions, interactive discussions, leadership workshops, and networking opportunities.

### **IMPORTANT INFORMATION ABOUT THE REGISTRATION PROCESS**

GFOA has streamlined the registration process combining both the preconference seminars and full conference registration into a single transactional flow. After clicking the "Register" button below, please select all of your options prior to checking out of your shopping cart. Once you have completed a registration, you will not be able to add or remove products through your GFOA account. To add preconference seminars at a future date, please fill out the selected options on this PDF and submit it to [training@gfoa.org](mailto:training@gfoa.org). Learn more about the Closing Event and purchase tickets [here](#).

**[REGISTER](#)**

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## **[GFOA Utility Finance Forum Virtual Networking Event.](#)**

**May 17, 2024 | 2 pm - 3 pm ET**

### **Details:**

We're happy to announce over 150 new members to the Utility Finance Forum (UFF) this past month, bringing membership close to 700! To foster connections among our growing community, we're hosting a virtual Networking Event on May 17th, and we want you to join us. This event will provide an opportunity to share insights, exchange ideas, and shape the future direction of the UFF. Don't miss a chance to meet your colleagues from across utility organizations and municipalities, forge new connections, and lay the groundwork for an exciting year ahead!

Member Price: Free

Non-member Price: Free

**[REGISTER](#)**

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## **GFOA's Best Practices Forum.**

During this week-long virtual event, **July 29 - August 2**, GFOA presenters will highlight over 20 individual best practices and provide the latest information on current trends, implementation considerations, and essential practices for all governments. Don't miss this opportunity to expand your knowledge.

[FORUM REGISTRATION](#)

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## **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.

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## **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.

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**[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](#)

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## **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

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## **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.



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## **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](#).

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## **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.

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## **[NASBO Spring Meeting Registration Open.](#)**

**April 10-12 | Mobile, Alabama**

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

**National Association of State Budget Officers**

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## **[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.

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## **[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.

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## **[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

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## **[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.

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## **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.

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## **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](#).

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## **[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](#).

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## **[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

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## **[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.

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### **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.

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### **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.

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## **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.

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## **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.

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## **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.

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## **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.

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## **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.

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## **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.

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## **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.

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## **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.

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## **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.

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## **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**

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## **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..

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## **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](#)

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### **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.

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### **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.

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### **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](#)

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## **[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.

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## **[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**

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## **[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.

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## **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.

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## **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.

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## **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

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## **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.](#)

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## **[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.

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## **[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.

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## **[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.

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## **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](#)

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## **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](#)

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## **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]

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## **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.

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## **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.

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## **[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](#)

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## **[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](#)

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## **[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.

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## **[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](#).

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## **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](#)

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## **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.

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### **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>

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

**July 27, 2023 | Chicago, IL**

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

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### **[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.

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

**Oct 11-13 | Indian Wells**

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

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### **[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](#)

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## **[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](#).

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## **[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

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## **[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](#)

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## **[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.

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## **[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.

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## **[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.

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**[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.

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**[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](#).

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

**August 23-25 | Austin, Texas**

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

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**[GFOA Webinar: ERP Project Readiness](#)**

**Thursday, June 1, 2023**

[VIEW DETAILS](#)

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## **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.

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## **NASBO Annual Meeting.**

**July 16 - 19 | Wilmington, DE**

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

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## **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.



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## **[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.

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## **[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](#)

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## **[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.

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## **[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

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## **[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](mailto:news@sec.gov). For registration questions, please contact the Office of Municipal Securities at (202) 551-5680 or at [municonference2023@sec.gov](mailto:municonference2023@sec.gov).

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## **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](#)

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## **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](#)