
[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](#)

[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.

[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.

[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.

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.

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.

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

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.

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.

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

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

[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.

[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

[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

[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.

[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](#)

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

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.

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

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.”

Fitch NFP Hospitals Early Median Review Webinar.

April 10, 2025 | 12:00pm EDT

[Register](#)

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.

[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.

[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

[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

[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.

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.

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](#)

[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

212.506.5275

[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.

[Risk Management and the Bond Credit Rating Evolution: CDEA 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.

[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.

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.

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.

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.

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.

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.

[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

[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](#)

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

[Listen to the podcast.](#)

[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

[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.

[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.

[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

[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](#)

[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.

[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.

[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.

[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.

[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

[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

[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.

[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.

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.

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.

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](#)

[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.

[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.

[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.

[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!

[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.](#)

[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.

[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.

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.](#)

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.

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

[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

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](#)

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

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

December 5-6, 2024 | Nashville, Tennessee

Registration Coming Soon

[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.

[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.

[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. Learn more about the Closing Event and purchase tickets [here](#).

[REGISTER](#)

[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](#)

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](#)

Accounting for Capital Assets - GFOA In-Person Training.

May 15, 2024

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

Details:

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

Learning Objectives:

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

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

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

May 14, 2024

GFOA Training Center

**203 N. LaSalle Street, Suite 2700
Chicago, Illinois**

Details:

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

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

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

Wednesday, May 01, 2024

2:30 PM - 4:00 PM EDT

The Brookings Institution

Falk Auditorium

1775 Massachusetts Ave NW

Washington, DC 20036

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

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

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

[Attend in Person](#)

[Watch Online](#)

BLX/Orrick 2024 Post-Issuance Compliance Webinar.

2024 PIC Updates

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

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

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

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

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

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

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

Cynthia Sixtos
csixtos@blxgroup.com
213 612 2207

Inflation Reduction Act Elective Pay: Best Practices - GFOA Webinar

April 30, 2024 | 2 pm - 4 pm ET

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

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

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

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

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

Speakers include:

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

Topics include:

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

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

Watch the webinar recording [here](#).

Identifying Component Units: GFOA Webinar

March 26, 2024 | 1 pm - 2 pm ET

Details:

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

Learning Objectives:

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

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

[NASBO Spring Meeting Registration Open.](#)

April 10-12 | Mobile, Alabama

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

National Association of State Budget Officers

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

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

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

Details:

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

Learning Objectives:

Attendees will receive updates on the ARPA / SLFRF timeline.

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

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

Member Price: \$35.00

Non-member Price: \$70.00

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

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

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

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

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

Learning Objectives:

Those completing this seminar will be able to:

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

Member Price: \$85.00

Non-member Price: \$170.00

[Click here](#) to register.

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

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

[Listen to the podcast.](#)

Dykema

2.22.24

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

March 28, 2024 | 3 pm - 4 pm ET

Details:

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

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

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

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

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

Details:

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

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

California Municipal Finance Institute Conference.

December 11-12, 2024

The Meritage

875 Bordeaux Way, Napa, CA

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

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

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

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

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

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

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

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

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

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

To register, [click here](#).

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

February 28, 2024 | 1 pm - 3 pm ET

Details:

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

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

Learning Objectives:

Those who successfully complete this seminar should be able to:

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

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

Member Price: \$85.00

Non-member Price: \$170.00

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

February 5, 2024 | 1 pm - 2 pm ET

Details:

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

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

Learning Objectives:

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

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

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

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

You can learn more about each event below.

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

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

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

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

Details:

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

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

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

Revenue Policies: GFOA In-Person Training

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

Grand Hyatt DC
1000 H Street
Washington, District Of Columbia

Details:

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

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

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

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

January 10-12, 2024

Details:

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

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

Preparing an Annual Comprehensive Financial Report: GFOA eLearning Course

January 9-11, 2024

Details:

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

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

GFOA 2023 GAAP Update Encore.

December 14, 2023 | 1 pm - 5 pm ET

Details:

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

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

This year's event will cover:

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

Upcoming implementations new GASB Statements

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

New GASB implementation guidance

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

Special Segment - Panel Discussion

- Successful strategies for hiring to fill accounting and auditing positions

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

Best Practices and Strategies for Public Investing: GFOA eLearning Course

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

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

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

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

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

December 12, 2023 | 1 pm -3 pm ET

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

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

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

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

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

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

[Disclosure Update: GFOA Webinar](#)

November 29, 2023 | 1 pm - 3 pm ET

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

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

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

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

Details:

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

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

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

Budget Document Basics: GFOA eLearning Course

Nov 14, 15 & 16, 2023

Details:

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

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

NFMA High Yield Advanced Seminar.

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

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

To register, [click here](#).

National Federation of Municipal Analysts

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

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

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

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

NOVEMBER 14, 2023 - WEBINAR

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

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

WHO SHOULD ATTEND?

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

opportunities presented by the ESG backlash at the state level.

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

NOVEMBER 14, 2023 1 - 2 PM

[REGISTER](#)

Compensated Absences: GFOA Webinar

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

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

Overview of Public Procurement: GFOA Webinar

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

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

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

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

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

[REGISTER](#)

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

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

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

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

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

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

[Click here](#) to register.

National League of Cities

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

October 26, 2023 | 1 - 3 pm ET

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

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

GFOA: Fundamentals of Preparing an Annual Comprehensive Financial Report

GFOA eLearning Course | Oct 24 - 26

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

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

GovFin 2023: Empowering Governments, Modernizing Reporting Conference

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

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

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

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

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

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

[Listen to audio.](#)

Bond Dealers of America

September 22, 2023

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

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

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

[Watch video.](#)

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

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

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

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

September 20, 2023 | 1 pm - 3 pm ET

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

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

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

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

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

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

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

[Click here](#) to register.

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

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

[REGISTER](#)

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

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

[WATCH](#)

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

[Listen to the Podcast.](#)

[08/21/23]

BLX/Orrick 2023 Post-Issuance Compliance Workshop.

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

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

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

Financing Essential Infrastructure: NLC 2023 Municipal Bond Market Update

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

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

babies born in the State.

[Click here](#) to register.

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

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

[REGISTER](#)

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

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

[LEARN MORE](#)

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

THU, 24 AUG | 1 PM ET

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

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

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

[NFMA Advanced Seminar on Transportation.](#)

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

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

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

To register, [click here](#).

Overview of a Bond Issuance: GFOA eLearning Course

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

Details:

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

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

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

Learning Objectives:

Those who successfully complete this seminar should be able to:

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

Member Price: \$315.00

Non-member Price: \$630.00

[REGISTER](#)

New GFOA Video: Legacy Lease Accounting

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

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

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

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

XBRL US Hosts GovFin 2023: Empowering Governments, Modernizing Reporting

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

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

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

Speaker organizations confirmed to date include:

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

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

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

About XBRL US

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

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

July 27, 2023 | Chicago, IL

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

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

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

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

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

Oct 11-13 | Indian Wells

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

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

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

Uncertainties Disclosures.

[LEARN MORE](#)

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

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

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

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

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

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

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

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

[READ MORE](#)

JULY 6, 2023

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

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

[LEARN MORE](#)

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

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

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

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

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

Details:

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

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

Learning Objectives:

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

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

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

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

Details:

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

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

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

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

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

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

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

To register, [click here](#).

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

August 23-25 | Austin, Texas

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

[GFOA Webinar: ERP Project Readiness](#)

Thursday, June 1, 2023

[VIEW DETAILS](#)

Water Security in a Changing Environment: MAGNY Webinar

Date: Thursday, May 25, 2023

Time:

Zoom Meeting Time: 12:00 – 1:00 pm ET

Location:

Zoom ONLY

Details:

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

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

NASBO Annual Meeting.

July 16 - 19 | Wilmington, DE

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

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

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

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

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

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

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

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

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

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

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

[REGISTER](#)

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

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

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

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

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

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

internationally.

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

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

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

March.30.2023

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

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

Conference topics will include:

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

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

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

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

Fiscal First Aid: GFOA Webinar

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

Details:

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

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

Learning Objectives:

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

Member Price: \$210.00

Non-member Price: \$420.00

[REGISTER](#)

Developing an RFP for an ERP System: GFOA Webinar

April 11, 2023 | 1 pm - 3 pm ET

Details:

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

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

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

Member Price: \$85.00

Non-member Price: \$160.00

[REGISTER](#)

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

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

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

[Register Now](#)

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

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

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

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

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

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

CLE Type: CPE and MCLE (pending in California)

CLE Credits Available: Y

[REGISTER](#)

Correctly Calculating Net Investment in Capital Assets: GFOA Webinar

March 13, 2023 | 1 PM - 2 PM ET

Details:

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

Learning Objectives:

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

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

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

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

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

Neal Pandozzi, Andrew Stern

Bowditch & Dewey

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

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

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

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

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

[Register Now](#)

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

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

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

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

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

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

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

[Click here](#) for FAQs.

[Click here](#) to register.

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

Wednesday, February 22

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

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

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

The key topics/trends to be discussed will include:

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

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

[REGISTER NOW](#)

[NFMA 2023 Annual Conference.](#)

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

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

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

GFOA eLearning: Federal Funds Fair Begins March 7

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

[REGISTER](#)

GFOA Advanced Governmental Accounting in Chicago.

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

[REGISTER](#)

GFOA Preconference Seminar Feature: The Importance of Cash Flow Forecasting

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

[REGISTER](#)

CDEFA Food Systems Finance Webinar Series: Bonds & Food Systems

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

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

Moderator:

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

Speaker:

Rodney Wendt, Executive Director, Washington Economic Development Finance Authority

[Click here](#) to register.

Governmental Accounting for Non-Accountants: GFOA Webinar

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

Details:

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

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

Learning Objectives:

Those completing this seminar will be able to:

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

Member Price: \$85.00

Non-member Price: \$170.00

[REGISTER](#)

NASBO Spring Meeting.

April 26-28, 2023 | San Diego, California

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

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

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

GFOA Accounting Academy: An Intensive Introduction

In-Person Training

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

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

Details:

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

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

Learning Objectives:

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

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

Member Price: \$1197.00

Non-member Price: \$1633.50

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

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

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

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

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

[Click here](#) to register.

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

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

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

[Click here](#) to register.

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

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

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

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

[Listen to podcast.](#)

Bond Dealers of America

December 21, 2022

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

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

programs such as Community Development Block Grants.

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

[GFOA Annual Conference - 2023](#)

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

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

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

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

Details:

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

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

Learning Objectives:

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

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

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

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

Implementation and Variations to Lease Contracts: GFOA Webinar

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

Details:

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

Learning Objectives:

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

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

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

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

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

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

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

Speakers:

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

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

[REGISTER](#)

Fitch Ratings Credit Outlook North America 2023.

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

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

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

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

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

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

[REGISTER NOW](#)

The Root of Local Government Revenue: GFOA Webinar

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

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

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

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

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

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

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

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

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

[CSMA Fall Conference.](#)

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

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

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

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

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

[REGISTER](#)

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

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

Details:

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

Who Will Benefit: CFO/Finance Director, Treasurer

Learning Objectives:

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

Member Price: \$315.00

Non-member Price: \$630.00

[REGISTER](#)

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

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

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

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

Gain perspective on these key questions:

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

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

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

[REGISTER NOW](#)

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

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

Funding Childcare Facilities

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

Moderator(s)

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

Speaker(s)

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

[Register here.](#)

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

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

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

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

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

[Register](#)

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

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

[REGISTER](#)

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

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

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

[Register Now](#)

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

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

[REGISTER](#)

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

October 7, 2022 | 2 pm - 3 pm ET

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

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

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

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

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

[LISTEN](#)

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Fundamentals of Local Government Budgeting: GFOA eLearning Course

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

Details:

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

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

Learning Objectives

Those who successfully complete this seminar should be able to:

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

Member Price: \$490.00

Non-member Price: \$980.00

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

[CDFA Ohio Financing Roundtable.](#)

September 14, 2022 | Columbus, OH

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

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