



January 2021 Quarterly Training (5 CPEs)

Date: Jan 7 & 14

January 7 10-11AM

Tiger Team Approach To Addressing Fiscal Challenges in Government

Managing any government organization is complicated, even during periods of stability and consensus from elected officials. The CFO and their Financial Management Team play a vital role in helping any government organization manage its budget, create value, execute the mission, and achieve policy objectives.

The CFO and their Financial Management Team can focus on the fundamentals – strategy and mission priorities, essential towards achieving goals with Tiger Teams' support. Ideally, these teams are cross-functional or matrixed, considering all Financial Management perspectives, including internal auditing, legal, accounting, risk management, compliance, data, and IT.

This session will demonstrate factors impacting a Tiger Team's effectiveness and how Tiger Teams present a strategic approach to problem-solving that could add significant value to the government today. Speaker Jonathan Ngah will discuss how to meet the fiscal challenges in government within a value chain framework. The framework utilizes Tiger Teams to promote innovations through a simple, flexible, and agile structure, supporting operations impacting Financial Management to help leadership create, capture, and sustain value.

Speaker: Jonathan Ngah, Principal, Synergy

January 7 11-12PM

Current Issues on Federal Grants Reporting

In this session, we will cover Single Audit developments related to COVID-19 relief funding, including the recently released addendum from OMB, and four of the largest new federal programs funded by the CARES Act.

Speaker: James Shankland, Manager, HeinfeldMeech

January 14 11-12PM

Relationship Building for Economic Success

This interactive session will provide an overview on what is economic development and how financial officers can partner with economic developers for their communities' economic success.

Speakers:

Carrie Kelly, Executive Director, Arizona Association for Economic Development

Mignonne Hollis, Executive Director, Arizona Regional Economic Development Foundation

Lori Collins, Deputy Director of Economic Development, City of Mesa

Ron Curtis, Executive Vice President of Lending, American Southwest Credit Union

12-1PM Lunch Break

January 14 1-2PM

The Economy: Yield Curve Whiplash

Going from a zero-interest rate environment to rising interest rates to a flattening yield curve to an inverted yield curve. What is the curve telling the markets? How does this environment affect portfolios, liquid and core? How do portfolio managers navigate the rapid changes?

Speakers:

Ash Mehta, Vice President of Investment Advisory Services, Public Trust Advisors

Chris DeBow, Managing Director, Public Trust Advisors

January 14 2-3PM

Economic Indicators: This Is the Way

This session provides an introductory overview to key economic indicators including big-picture data like GDP, inflation, and unemployment, sector data such as housing and manufacturing data, central bank policies, and international indicators. We will discuss the indicators and how they provide measurements regarding the health of the economy and financial markets.

Speakers:

Luke Schneider, Director, PFM Asset Management LLC

Annette Gaston, Senior Managing Consultant, PFM Asset Management LLC

Paulina Woo, Managing Director, PFM Asset Management LLC