



**May Training 2022**  
**Thursday, May 19, 2022**  
**9:00 a.m. – 3:00 p.m.**  
**Surprise City Hall Community Room**  
**Agenda**

**Registration Opens**  
**8:00 a.m.**

**Session: The Next Phase of Data Sharing: Financial Benchmarking & Reporting**  
**9:00 a.m. - 9:50 a.m.**  
**1 CPE**

**Brandi Flores**, Senior Financial Management Analyst, Surprise  
**David Swindell**, Director for the Center for Urban Innovation and Associate Professor, School of Public Affairs, Arizona State University

Lead by a team of graduate students from Arizona State University, an interactive reporting tool has been created to examine the effectiveness and efficiency of spending across a set of valley cities. By incorporating audited financial data from each city's financial statements, this tool provides compelling comparative analysis and visualizations. In this session you will learn more about the functionality of this tool and future plans to launch this into a resource which can be utilized by all participating cities to drive decision-making.

**Session: Grants Training Overview**  
**10:00 a.m. - 10:50 a.m.**  
**1 CPE**

**Dennis J. Osuch**, CPA, Principal, State and Local Government, CliftonLarsonAllen LLP

The landscape for complying with federal grant requirements has become increasingly more complex over the last several years and the influx of new monies have made grant tracking more challenging. This session will discuss some key tips for maintaining compliance with the various grants and programs your organization is spending, as well as providing best practices for organizing and tracking grant awards, receipts and disbursements to ensure completeness of your schedule of federal expenditures. We will navigate the applicable CFR and common missteps related to compliance to help your organization ensure compliance related to programs you're operating.

**Session: Budget Forecasting**

**11:00 a.m. - 11:50 a.m.**

**1 CPE**

**Chris Olvey**, Forecast Budget Coordinator, City of Mesa

**Susan Lu**, Forecast Budget Analyst, City of Mesa

This presentation will discuss approaches to short-term and long-range forecasting of primary funding sources – including local sales tax and utility revenues

**12:00 p.m. - 12:50 p.m.**

Lunch

**Session: How to Identify (And Improve) Your Internal Controls.**

**1:00 p.m. - 1:50 p.m.**

**1 CPE**

**Noemi Barter**, Manager, Henry + Horne

We will discuss the definitions of internal controls, walk through example processes and identify the components of a control. In addition, expect to chime in and provide examples in your own organization to help improve checks and balances. We will identify some red flags that might be happening in your own organization.

**Session: Moving your Accounts Payable and Payment Processes to the Digital Age**

**2:00 p.m. - 2:50 p.m.**

**1 CPE**

**Parviz Hamidzadeh**, Relationship Manager and Vice President, JP Morgan Government Banking

**Carl Konecek**, Executive Director, JPMorgan Government Banking

**Dan Warren**, Relationship Manager and Executive Director, JPMorgan Government Banking

Steps and ideas on programs and the security of moving to an e-payables platform.

**Conclude**

**3:00 pm**