

GFOAz 2025 October Training (5 CPEs) | AGENDA

8:00 a.m. | Registration Opens

9:00 - 9:50 AM | The Budgeting Trail: Mapping Success One Step at a Time – An Interactive Panel Discussion | *1 CPE*

During this session, you will hear from leaders across several municipalities on how they gear up for the budgeting journey by sharing best practices on developing and sharing their budget calendars, complying with State statutes, inviting public input, City Council preparation, budgeting tools, etc. We will then move into navigating the terrain, where our panelists will share tips for conducting budget meetings, managing the number of attendees, submission and evaluation of new programs and/or capital projects, planning for unexpected expenses, proposing salary and/or benefit increases, etc. Finally, we will conclude the interactive panel discussion by sharing ideas on posting of public hearings, sharing tips for effective City Council presentations, discussing processes for handling budget amendments after adoption, tips for budget management and review throughout the fiscal year, etc.

Moderator:
Karen Kurtin, *Director and Government Outsourced Accounting Services Leader, Forvis Mazars*

Speakers:
Robert Baer, *Municipal Budget Director, Tempe*
Michael Blunt, *Senior Budget and Research Analyst, Goodyear*
Matthew Dunbar, *Budget & Policy Director, Chandler*
Gustavo Nava, *Department Budget Supervisor, Phoenix Community and Economic Development*

10:00 - 10:50 AM | Budget Update and Fiscal Outlook | *1 CPE*

The Arizona Governor's Office of Strategic Planning and Budgeting will provide an update on current trends at the State Capitol regarding budget, economics, and federal policy changes.

Speaker:
Ben Henderson, *Director, Arizona Governor's Office of Strategic Planning and Budgeting*

11:00 - 11:50 AM | Capital Projects Process Review and Assessment | *1 CPE*

From identifying the need to a project, proposing a project in the budget, what elements should be provided for the project to be funded, through change orders and lightly project management (covers CIP Project Classifications, CIP Ticket Elements, CIP Planning Timeline, Change Control, Project Reporting and the PM Manual).

Speaker:
Eric Portlock, *Managing Director, Protiviti*



12:00 - 12:50 PM | Lunch

1:00 - 1:50 PM | Budgeting with Purpose: Turning Strategy into Action | *1 CPE*

City budgets should reflect the community's strategic priorities, but too often the two processes run separately. This session will show finance directors how to connect strategic plans directly to budget decisions. Participants will learn a straightforward framework for linking goals to spending, explore common challenges like competing priorities and limited resources, and practice strategies for communicating alignment to councils and the public. Through interactive exercises and real-world examples, attendees will leave with practical tools — including a simple alignment checklist — that they can apply immediately in their next budget cycle.

Speakers:
Jana Cinnamon, *Partner, Chief Operating Officer, Abdo*
Vicki Holthaus, *Partner, Abdo*

2:00 - 2:50 PM | ASRS Contribution Prepayment Program | *1 CPE*

Public pensions nationally total over $4 trillion, which approximates the size of the entire municipal market. Paul Matson, Executive Director, ASRS; Mark Reader and Omar Daghestani, Managing Directors, Stifel will share nascent and emerging trends including longevity, payroll increase and more in the Arizona and national pension space as well as actionable tools and strategies that Arizona employers may us to more efficiently manage their ASRS and PSPRS positions.

Speakers:
Paul Matson, *Executive Director, ASRS*
Mark Reader, *Managing Director, Stifel*
Omar Daghestani, *Managing Director, Stifel*

3:00 PM | Concludes