

Florida Government Finance Officers Association

Your professional resource for education, networking, leadership and information.



October/November 2007

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GASB Statement No. 44 – Common Reporting Issues

By Paul E. Glick, Glick Consulting Group

Most governments have implemented GASB Statement No. 44 for the years ended in 2006. Unfortunately, many governments have not prepared their statistical section consistent with all aspects of the statement. This article highlights some common statistical section reporting deficiencies.

All Tables – Probably the most common missing information is narratives, which explain significant changes in the data presented from year to year. For example, the narrative might explain why certain revenue sources or expenditure functions increased or decreased substantially from the prior year. Also, if the net asset account, invested in capital assets, net of related debt amount changes materially the reason why could be noted (e.g., referencing particular construction projects).

Financial Information – Governments need to include all governmental funds, including the capital projects fund. Limiting the reporting to general fund data

or to general fund and special revenue funds data is common, but incomplete. All governmental funds must be included. The calculation of the debt service expenditures as a percentage of non-capital expenditures often is calculated incorrectly or sometimes is missing. The total expenditures should be reduced by the amount of capital assets “capitalized” (the best source of this information is the operating statement reconciliation, which indicates the amount of capital outlay expenditures capitalized).

Revenue Information – On the property tax schedule, the amount of delinquent tax collections should be presented in the year to which they apply, not in the year collected. As a result, normally there should be no delinquent collection for the current year reported. Also, total tax collections for a single year should never exceed 100 percent of the tax levy.

Some government’s major own-source revenue is sales taxes or utility charges,

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2007 School of Governmental Finance



Registration now open!
November 12-16, 2007

PGA National Resort
& Spa
Palm Beach Gardens,
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President's Message



Mark A. Fostier, CPA, CGFO, CPFO
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Well, now that everyone has made it through the September budget hearings and approved budgets are in place for next fiscal year, our attention turns to the effects of property tax reform for fiscal years 2009 and beyond. Several of our members have indicated that much confusion still exists regarding the effects of HB 1B on subsequent fiscal years. To assist in this regard, the Legislative Committee, under the leadership of Kent Olson, has distributed several e-bulletins addressing this issue along with illustrative examples. As a reminder, information about property tax reform also can be found on the FGFOA Web site (www.fgfoa.org).

As you may be aware, the 2007 Florida Taxation and Budget Reform Commission (TBRC), created pursuant to Article XI, Section 6 of the Florida Constitution, is well underway. The commission, which meets every 20 years, has very broad powers in that it can submit proposed constitution changes directly to the voters in November 2008. The commission also can make recommendations to the Florida Legislature regarding proposed statutory changes.

As requested by the TBRC, the FGFOA conducted an informational presentation regarding county and municipal budgeting processes. More importantly, the TBRC also has requested that the FGFOA's Legislative Policy Statements be submitted in "draft" bill format for their consideration. The Legislative Committee is hard at work to honor their request and take advantage of this unique opportunity.

The Career Development Committee, under the direction of Katrina Laudeman, has been busy planning several sessions this year. Given the implications of property tax reform, the committee decided to host each of the six seminars at different locations throughout the state. Please be sure to support this effort by attending a seminar in your area. The next seminar (titled GASB/SEC/OPEB update) will be held on Thursday, October 11, 2007, in Sarasota. For more information, including dates and locations of future seminars, please visit our Web site.

Speaking of education, please plan to attend the 2007 School of Governmental Finance on November 12 - 16 at the PGA National Resort and Spa in Palm Beach Gardens. The SOGF Committee, chaired by Barry Skinner, has put together an outstanding educational program as well as various networking opportunities. The School will offer more than 50 educational sessions on a variety of topics during this week-long event.

Review courses for the Certified Government Finance Officers (CGFO) exam will be held from Tuesday, November 13 through Thursday, November 15, 2007, with the exam being held on Friday, November 16. Both the review courses as well as the exam will be held in conjunction with the 2007 School. In addition to preparing for the exam, the Certification Committee, under the leadership of Mary-Lou Pickles, has completed the refinement of the recommended reading materials for the exam as well as the design specifications for online CPE reporting. Once this latter initiative is complete, CGFOs will be able to track and report their CPE online.

The Member Services Committee, under the guidance of Ann Marie Ricardi, has added several new RFPs to the documents repository on the Web site. If you are tasked with procuring finance-related services, why re-invent the wheel. You can simply download RFPs issued by peer governments to use as a guide in developing your own RFP.

The new Small Government Committee, chaired by Joe Van Zile, is off to a great start. An initial "kick off" meeting was held on September 11, 2007, during which the committee prioritized its three main goals: (1) conduct a needs assessment survey, (2) provide outreach and (3) continue development of a small government resources manual. Committee members are very excited about the opportunity to assist small governments.

Our Association continues to grow in so many ways. I am quite impressed with the level of volunteerism demonstrated by many of our members. Combine this dedicated effort with the professional and quality services of our Executive Director, Jeannie Garner and her administrative team, and you have the recipe for success. My thanks to all of you who make the FGFOA such an outstanding organization!

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rather than property taxes. In these cases, the reporting government needs to present the applicable data for either of these own-source revenues. One item that is not clear in the statement is how to calculate user charges when making the determination of your own-source revenue. In other words, when you have more than one utility, do you add all user charges together or treat them as separate own-source revenues? I asked the national GFOA this question and they suggested that each utility's revenues stand on their own.

Debt Information – One of the tables requires governments to present outstanding debt as a percentage of personal income. Since personal income is not available for most cities, they have been omitting this data. However, these cities should include debt as a percentage of estimated actual value of taxable property, or use another relevant economic base, rather than just omitting this data.

Economic and Demographic Data – The most common problem with this data requirement is the failure to include all data, particularly for cities. The only required data is the population, total personal income, per capita income and the unemployment rate. As you probably know, the U.S. Bureau of Census gathers substantially more data for counties than for cities. On some of the tables that I prepared for clients, I have used the county data, as that was the only data available. This is a reasonable approach to missing data. With the required principal employer data, often the number of employees for each employer as a percentage of total employers is omitted. This omission relates to the availability of the number of employers. This is not a good solution to this information; usually the local chamber of commerce will have some type of data regarding the number of employers.

The following are good sources for economic and demographic data.

- City or county planning departments
- Your counties economic development department
- Area universities/colleges bureau of economic and business research
- U.S. Department of Commerce – Bureau of Economic Analysis
- U.S. Department of Labor – Bureau of Labor Statistics

Operating Data – Many governments are not reporting operating data by program. This information is available in many budget documents and just needs to be reported in the statistical section. For those governments not reporting this information, they should start accumulating this data. Also, governments have not been reporting much information regarding their capital assets. The government's capital asset system should be able to provide the suggested information, such as the number of vehicles by type, the specific infrastructure data, etc.

Should you have any questions regarding your statistical section, e-mail Paul Glick at pglick@mindspring.com.

All You Have to Do Is Volunteer

By Lisa Brown

The highest reward for a person's work is not what they get for it, but what they become because of it. - John Ruskin

The FGFOA provides numerous opportunities for you to participate. Volunteering with our professional organization allows you to meet people in other governmental agencies, offers incredible networking possibilities, and gives you personal ownership in the FGFOA. The commitment is nothing more than what you are willing to contribute.

Volunteering demonstrates workplace skills, management skills, customer service skills and leadership skills that can be documented in a resume. Committee volunteers have the opportunity to contribute by persuasion, innovation, ideas and ideals. Volunteering is an excellent place to observe others and declare ideas that can make a difference to the organization.

At any time, you can turn to the membership via e-mail or phone with your questions and be confident that you will get multiple, helpful responses.

Volunteer a little or volunteer a lot, the choice is yours - but please volunteer! For specific areas currently in need of help, please e-mail Kelly Davis at kshine@flcities.com, and she'll help you find the right match.

Tips on Performing Employee Evaluations

By Kathy Hankins and Ann Marie S. Ricardi

It's the time of year dreaded by most managers and employees. It's the time when we get out the performance appraisal form, check-mark the correct boxes and bring the employee in to tell them how much we appreciate them, but how they can be better.

Although dreaded, this is an important part of our job. So, how can we make this ulcer-causing task more pleasant? The suggestions in this article are for those managers who recoil from this responsibility. Some managers have developed a keen ability and talent for conducting employee evaluations. They should skip this article, as this is written for and by performance evaluation meat-heads (referred to within this article as PEMs).

This article won't help with problem employees; it simply will make the time-honored task of the annual evaluation for the average and above-average employee more fruitful, and less wasteful.

Start early on the task by creating a file for employee evaluations. Every Friday at 4:00 p.m., make it your job to add at least one thought per employee to that file. Although tracking this information on paper is a simple method, the process of doing this on a schedule is the key to success. Technologically literate supervisors may choose to track the data in a MicroSoft Word file. Identify the key positive events occurring around your employees (i.e., successful assignments, initiatives, volunteering on employee committees, etc.), but don't forget the less favorable issues or problems. The good PEM will recognize that no employee is perfect, and whether he or she missed an important deadline, didn't research an answer, wrote a poor report, showed his temper to a customer or didn't seem fair with his hours, tracking the bad also will help the evaluation.

Four weeks before the review, send an e-mail to the employee reminding him of this upcoming review. Ask the employee to provide a written summary, no more than one-page, of successes for the past year. A smart supervisor will have it returned via e-mail, so that the words can be cut and pasted right onto an electronic evaluation form, making the evaluation even easier.

When the big day comes, set up a time and place to meet so that you'll have quiet privacy. As you get comfortable, follow this general guide for the meeting.

1. Before getting in the evaluation details, explain your goals for the evaluation meeting. Goals to include completing the form to complying with human resource's rules, but may also include recognizing good performance, identifying training needs and receiving feedback about your management style.
2. Review the form with the employee. Have the employee sign it, so that the formal function is complete.
3. Once the uncomfortable part of the task is over, take some time to converse about job performance. Most employees want or need praise, so spend time describing what they are doing right. Have specific examples from the file you kept.
4. Be sure to ask the employee about his or her training needs.
5. To enhance the conversation, select an item from your personnel handbook to share with each of your employees. Ideas include the employee Internet use policy, the employee bonus program or the employee ethics policy. Be sure each employee hears the same rule.
6. Take this opportunity to find out something new about the employee, even something as simple as what they did this weekend. This interaction will make you understand your employee better. Take notes, and put those in the employee file. In the future, you could be asked to introduce your employee, either at a retirement party or a council presentation. The personal notes that you take during this session will help you write a good speech!
7. Finally, let them know that they can write an alternative point of view for his or her file in case of disagreement.

As important as this annual review activity is to the government system, the information that is given on the evaluation should never come as a surprise to the employee. Have regular interaction with praise and counsel given throughout the year, not just at evaluation time.

The dreaded activity of giving an employee a review can be less painful for all PEMs who take time to prepare now. These tips may help you do it just a little bit better.

Don't Be ITimidated

By Jon Svendsen, Fiscal Projects Coordinator, Brevard County Sheriff's Office

Are you ITimidated? Let's face it. Like it or not, computers are an integral part of our daily lives and when you have trouble with your computer at work it can really ruin your day. Most workplaces have an IT staff that can handle almost any kind of computer problem, but sometimes these folks are overworked, especially if many people are having problems at the same time. There may be a solution that can get you back to work at your computer.

Although Windows has made most of us really like the ease of pointing and clicking, it helps to know some command-line diagnostics that could help your stressed out IT staff. You also will gain some additional knowledge about how your computer works and the network it resides on.

One common problem is that all of a sudden you are unable to access the Internet. The cause of this problem could be many different things, and your IT staff may be the only people who can fix it. However, you can find out if you can connect to the Internet and rule out a possible hardware problem by going to (in Windows) Start, Run, and type cmd. This will open up the command line window. Then type, ping www.yahoo.com (or any other valid Internet address). You should get a message that says you got a reply and the round trip took so many milliseconds. This means that, more than likely, you don't have a hardware problem on your PC (like a loose network cable). Also, if you leave this window open, the IT staff can ask you questions about the diagnostics the ping command gives you. Another helpful command that you can type in this window is the ipconfig command. If you type ipconfig, you will get your IP address (a series of four numbers separated by periods), which can be helpful to the IT staff when they are trying to locate or isolate a problem on the network you are connected to. Your IP address is similar to your street address, and it shows exactly where you are located on your local network. By having this information ready when you talk to them, you can sometimes expedite a solution when your IT staff is trying to diagnose the problem.

If you are interested in expanding your knowledge of computers, a good place to start is to take an introductory computer course at your local community college. These courses cover the basics of computer hardware and also teach some fundamentals of operating system software. By helping your stressed IT staff, you may be able to get your problem solved faster, and also gain additional knowledge about computers that you can share with others in your office to solve similar problems that they may encounter.

Committee Reports

Career Development Seminar Committee

Katrina A. Laudeman, City of Orlando, Chair

The members of the Career Development Committee have been hard at work to provide the membership with beneficial continuing education. The schedule has been finalized and the seminars are on the way. The first seminar on Revenue Reduction and Budget was held on September 28 in Altamonte Springs. The second is to be held on October 11 in Sarasota on OPEB and GASB. Future seminar topics include IRS audits, grants, investments, and risk management. For more information on the entire schedule and current seminars, please visit the FGFOA Web site. We hope you can take advantage of the educational opportunities provided through these seminars. As always, if you have any questions or require additional information, contact Katrina Laudeman at katrina.laudeman@cityoforlando.net or call (407) 246-2685.

Certification Committee

Mary-Lou Pickles, St. Johns River Water Management District, Chair

Members of the Certification Committee have been preparing for the November CGFO review sessions and tests that will be offered in conjunction with the School of Governmental Finance. As of September 5, 2007, 25 new candidates have been accepted into the CGFO program. The review and updating of the suggested reading materials listing has been completed and posted on the Web site. I would like to thank the instructors for the review classes: Ted Byrd, Charles Holland, Bill Rotella, Kris Shoemaker and Karen Simpson for their time and commitment to ensure their respective review sessions are top-notch.

Good luck to everyone taking the CGFO exams. The committee applauds your efforts to obtain this distinguished designation.

If you had a June 30, 2007, CPE renewal date and haven't already done so, please send in your renewal form along with the appropriate fee to Kelly Davis at the FGFOA administrative office as soon as possible. As of this writing, 24 CGFOs with a June 30, 2007, renewal date have not submitted their forms.

Conference Host Committee

Karen Myers, St. Johns River Water Management District, Chair

The 2008 Conference Host Committee continues developing unique and interesting activities for FGFOA member's enjoyment at the Hyatt Regency on the Jacksonville downtown waterfront. Preliminary plans include:

- Theme/Logo/Welcome Bag – "Teamwork" is the conference theme, and a logo has been submitted to the Board for consideration
- Association Night – reception with vendors, followed by a dinner buffet and entertainment
- Hospitality Suite – truly a "destination" of its own, the Hospitality Suite will showcase special themes each evening, including food, refreshments and entertainment
- Walking Tour on Sunday morning – for those "non-golfers" who want to enjoy the downtown area and get some exercise, two separate walking tours will be mapped out, either a leisurely stroll down the Riverwalk or a more challenging course for a real workout
- Monday lunch provided with conference registration – great networking opportunity

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The Opening Session, Tuesday Night Event, President's Reception and Golf sub-committees continue working on their individual events and updates will be provided in future newsletters. Thanks again to committee chairs, Charmon Buchanan, April Mitchell, Cindy Davis, Cindy Gardner, Mitch Perin, Patti Clifford, Wisteria Striglers, Bella Basilio and Joseph Strasser.

Conference Program Committee

Gary Perdew, St. Lucie County-Fire District, Chair

The last time the Association held a function in Jacksonville was for the 2004 School of Governmental Finance and I am really looking forward to returning to the area. The First Coast Chapter does a great job of supporting the FGFOA whenever we are in their area.

The committee is well on its way toward developing a dynamic conference program for the FGFOA membership. The management and budget, small government and treasury management tracts have identified all or most of their session topics and in some cases secured a speaker. I am confident the committee will produce a program that will reset the bar for future programs.

We held a conference call the morning of August 21, 2007. In addition to a periodic update, we discussed the importance of coordination between the various sub-chairs. This particularly applies to the treasury management and pre-conference sub-chairs due to the fact that the focus of the pre-conference will be investments.

I contacted the FICPA and requested an instructor for the ethics seminar scheduled for Wednesday, May 21, 2008. Although they have not yet responded, we are moving forward under the assumption they will be able to accommodate our first choice of dates.

Each of you can contribute to the success of the conference program. If you have a specific seminar topic and/or a speaker you would like the committee to consider, please send your recommendation to gperdew@slcfd.org and I will forward the information to the appropriate sub-committee.

Legislative Committee

Kim Adams, City of Largo, Communications Subcommittee Chairperson

The Legislative Committee continued working on policy proposals for the upcoming legislative session. Several subcommittees have been discussing new legislative policies and have also been reviewing prior year policies to

determine if the prior policies should be continued, revised or eliminated. The full committee met in August to discuss subcommittee recommendations and develop final proposed legislative policies that will be presented to the FGFOA Board of Directors.

Tax reform will continue to be a key legislative area, including related issues such as unfunded mandates and new revenue sources. The committee also discussed policies related to frozen premium tax revenues, reviewing (and repealing) sales tax exemptions and erosion of the Communication Services tax base.

Despite a focus on tax reform, other legislative areas warrant attention from the FGFOA, such as Article V, the effects of which have not been limited to counties. Municipalities have been impacted by Article V as counties have reduced services and sought to recover lost revenues that were previously passed through to municipalities.

Another item discussed at the August committee meeting dealt with State financial reporting requirements for local governments. Last year, legislation was proposed which would have required local governments to electronically post all revenues and expenditures on the government's website within three months after the fiscal year. Although the reporting requirement measure did not pass, further legislation along these lines remains likely next year, and a policy is being proposed by the Legislative Committee to address this issue.

A new Annual Financial Report (AFR) system is being developed by the State CFO's Bureau of Local Government that may address the Legislature's concern with improving the timeliness of reporting local government financial information. Rip Colvin, Executive Director of the LCIR, attended the Legislative Committee's August meeting and discussed the new AFR system, called LOGER (Local Government E-Reporting).

LOGER is an electronic, web-based system that will replace the current AFR reporting system. With LOGER, local governments will be able complete the AFR more efficiently and the new system will make financial information readily available to the public. LOGER will be operational in early November 2007 for submission of the FY 2007 AFR.

Member Services Committee

Anne Marie Ricardi, City of Naples, Chair

Check out the FGFOA document repository located at www.fgfoa.org/resources/samples.aspx for your information needs. With the cooperation of many governments,

we have added more than 25 new requests for proposals to the database. Our next project will be updating the document repository for finance-related policies. If you have any comments on what you'd like to see, contact any member of the Member Services Committee, or me at aricardi@naplesgov.com.

The Member Services Committee's next meeting is scheduled for September 27, 2007. The committee will be working on ways to encourage new members, including those from non-member governments; a strategy to market the CGFO Program; and continued improvements to the document repository.

School of Governmental Finance Committee

Barry Skinner, Orange County Comptroller's Office, Chair

You held the dates, November 12 – 16, 2007. You know the location, PGA National Resort and Spa, Palm Beach Gardens. By now, you should have received the announcement for the 2007 School of Governmental Finance. What are you waiting for? It's time to register!

The committee has done an outstanding job of coming up with 54 exciting sessions with more than 70 outstanding speakers. Your biggest challenge is going to be deciding which of the three concurrent sessions to attend. That's correct, three concurrent sessions every two hours for four and a half days. You will need three people just to cover it all.

For those of us who count continuing professional education (CPE) hours, please remember the number 36; that is the number of CPE hours one person can receive. That number includes Ethics, AA, TB and BEH, all at your discretion in just one concentrated week.

Just in case all these educational sessions are not enough, we are including nightly networking opportunities at the Hospitality Suite and a Tuesday Night Reception.

That gets us back to the question, what are you waiting for? It's time to register!

Small Government Committee

Joe Van Zile, City of Clermont, Chair

The committee had a "kick-off" telephone conference call on September 11, 2007. After introductions, President Fostier and Board Member Jim Dwyer discussed the history of the association's efforts in respect to addressing the issues of small governments as well as outlined the goals and objectives of the committee as approved by the Board. After considerable discussion regarding the direction of the committee, the committee members agreed to form three sub-committees to deal with the immediate goals of conducting a needs assessment survey, continuing to develop a small government resources manual and expanding outreach efforts to the smaller governments.

The committee members have been extremely helpful in starting this committee and are anxious to start working on the above noted goals. If anyone has suggestions or comments on other areas that could be reviewed in order to improve the service level to our smaller governments, please e-mail me at jvanzile@clermontfl.org.

Technical Resource Committee

Ron Haring, City of Tarpon Springs, Chair

The Technical Resources Committee has three main areas of responsibility which consist of responding to GASB exposure drafts, developing technical articles for the FGFOA newsletter and monitoring the discussion board.

GASB Exposure Drafts - The committee is still gathering information in preparation for a response to the exposure draft that was issued June 29, 2007, by GASB on "Accounting and Financial Reporting for Derivative Instruments" with a comment deadline of October 26, 2007. The exposure draft can be found on the GASB Web site at www.gasb.org. If anyone has comments on the exposure draft, please forward them to the Technical Resources Committee for review.

Newsletter Articles - We have two articles in this newsletter, one on "GASB 44 – Common Reporting Issues" from Paul Glick with Glick Consulting and the other titled "Don't be Imitated" by Jon Svendsen, Fiscal Project Coordinator at the Brevard County Sheriff's Office. We appreciate Paul and Jon for providing us with these articles.

Discussion Board - The committee will continue to monitor the discussion board which is located under the "Resources" tab on the home page of the FGFOA Web site. We encourage all members, whether you have a question or could help someone else with a question, to visit the discussion board.

Members with technical questions have the following three points of contact:

- Discussion Board at the FGFOA Web site under the Resources tab,
www.fgfoa.org.
- Kelly Davis at (850) 222-9684 or e-mail kshine@flcities.com.
- TRC Chairman, Ron Harring at (727) 942-5612 or rharring@ci.tarpon-springs.fl.us.

Chapter Reports

Central Florida Chapter

Imtiaz F. Khan, Osceola County

The Central Florida Chapter of FGFOA held its monthly luncheon/CPE meeting on Thursday, August 9, 2007, at the Maison and Jardin Restaurant, 430 S. Wymore Road, Altamonte Springs. Dave Hardison, Budget Administrator for Orange County, gave a presentation on performance measures and budget cuts. This presentation was timely as all government agencies were preparing budgets incorporating the changes mandated by the Legislature. This very informative presentation was well received by all present. The Legislative Update seminar was held September 13, 2007, with a presentation by John Wayne Smith, Assistant Director of Legislative Affairs for the Florida League of Cities. The next luncheon seminar on employment law/IRS update is scheduled for October 11, 2007, and will be the final seminar for 2007. The monthly seminars will resume on January 10, 2008.

The chapter is in the process of finalizing its seminar calendar for the remainder of 2008, with meetings on the second Thursday of the month.

We look forward to seeing you at these monthly luncheon seminars. Notices are provided to all members via e-mail. Reservations can be made to Chapter Secretary Katrina Laudeman at Katrina.laudeman@cityofOrlando.net.

Florida First Coast Chapter

Karen Myers, St. Johns River Water Management District

The First Coast Chapter kicked off the new year on September 7, 2007, with a great CPE presentation by Kent Olson, Budget Officer for the City of Jacksonville, who also serves as FGFOA Legislative Committee Chairman. His presentation titled "Nuts and Bolts," focused on recent changes in property tax legislation and was both educational and enjoyable – a refreshing combination.

The chapter's next meeting is scheduled for December 7, 2007, at the Hyatt Regency, site of the 2008 Annual Conference. Following the lunch meeting, and one-hour CPE session, the Conference Host Committee will meet for a walk-thru of the hotel. All chapter members are encouraged to join the Host Committee, and take an active role in planning and coordinating conference activities.

We invite all government finance professionals from Duval, Nassau, Clay, St. Johns, Baker, Columbia, Putnam and Flagler counties to join the First Coast Chapter. A membership application is available through the First Coast Chapter link located on the FGFOA Web site. Benefits of chapter membership include high-quality, inexpensive CPE, networking opportunities and great fellowship.

Gulf Coast Chapter

Dan C. Katsiyannis, City of Pinellas Park

We held our intermediate and advanced governmental accounting seminars on September 25 and 26, 2007, with Paul Glick. He is very knowledgeable regarding the GASB and their latest accounting pronouncements. Paul also is an entertaining speaker and has a great sense of humor. Our chapter has had him as an instructor each year for the last three years. We were able to offer each one-day seminar, including continental breakfast, lunch and afternoon snack, to our members for only \$45 a day!

We all want to take a moment and congratulate Ron Harring (our previous year's chapter president) for his appointment as chair of the FGFOA's Technical Resource Committee. We know Ron will do a great job for this important committee. Also, we want to acknowledge Jay Ravins, chapter treasurer, for his participation on this committee as well. In addition, Kim Adams, a past president and one of the founding members of our chapter, is in the process of working on a revenue manual database for the FGFOA. Kim has been involved with the state FGFOA for many years and has worked in many different areas including the Technical Resources Committee.

Our next quarterly luncheon will be held on Tuesday, December 4, 2007 at Tucson's. It will be our chapter's holiday luncheon. Our guest speaker will be Senator Dennis Jones and the topic will be property tax reform. What a great opportunity to hear about the latest events on this important issue from a major player in Tallahassee! Who knows, we may even be able to positively influence the political process on this issue. To promote the holiday spirit and have a little fun, we also will have a few games or contests with prizes for the winners.

Our annual investment seminar will be held on Friday, February 8, 2008, at Tucson's restaurant. I am hopeful that we can get the latest information on the market and where interest rates are going in the immediate future. The Board is considering changing some of the speakers and topics for this seminar relative to what we have had in prior years. It is anticipated that some of the topics will be issuing bonds, pensions and defined-contribution plans.

Heartland Chapter

Penny Robinson, Highlands County Sheriff's Office, President

Our most recent Heartland Chapter meeting was held on Thursday, September 20, 2007, at Chicanes in Sebring. Jeff Smith with the Indian River County Tax Collector's Office was our guest speaker and shared a presentation on tax reform earning attendees two hours of CPE.

Membership dues for the period of July 1, 2007, through June 30, 2008 are due. You should soon receive invoices in the mail.

Hillsborough Chapter

Catherine Edwards, Hillsborough County - CCC, President

Hillsborough Chapter's most recent membership meeting and training session was held on Friday, September 21, 2007, at the Frederick B. Karl County Center, BOCC Board Room 2nd Floor, 601 E. Kennedy Boulevard, Tampa. The topic was "Property Tax Issues" and was presented by Rob Turner, Hillsborough County Property Appraiser.

On Friday, December 7, 2007, the chapter will host a holiday "pot luck" luncheon at the George E. Edgecomb Courthouse, Room 202, 800 Twiggs Street, Tampa. Lunch will begin at 12:30 p.m. and the training session will start at 2:00 p.m. The topic is "Financial Management -Tax Collector's Office" and will be presented by Al Castano, Director of Accounting for the Hillsborough County Tax Collector.

Future training sessions are being planned for 2008 and include topics such as cyber crime; forensic accounting

- the expansion of proactive fraud detection; The Sterling Award; and risk management, insurance liability and claims. Refreshments are normally provided at training sessions and time is set aside for networking.

The primary mission of the Hillsborough Chapter is to provide convenient, cost-effective training opportunities to members. The chapter is in its third full year and continues to provide training at no cost, and also has been able to keep very reasonable membership dues. Chapter dues are only \$5 per year for active members and \$10 per year for associate members. A membership application can be found on the FGFOA Web site or you can contact Peggy Conkel at pconkel@hcsotampa.fl.us or (813) 247-8276.

For more information about the chapter, please contact Catherine Edwards at edwardsc@hillsclerk.com or (813) 276-2029, ext. 6153.

Nature Coast Chapter

Melisa J. Lowe, Southwest Florida Water Management District

The Nature Coast Chapter has been successful in providing opportunities to earn quality economical CPE credits using interesting and informed speakers. The Chapter covers a five-county area including Citrus, Hernando, Levy, Marion and Sumter counties. Quarterly meetings are held in July, October, January and April on the third Wednesday of the month. The meetings begin at noon with lunch being served by 12:30 p.m., followed by the CPE portion of the meeting from 1:00 p.m. - 4:00 p.m. Our location at Citrus Hills Golf & Country Club in Citrus County provides a great meeting room and quality food at a reasonable cost.

Our next quarterly meeting will be held on October 17, 2007. Our speakers include Benjamin Finkelstein, CFA, Senior Managing Director, Stanford Group Company and John Grady, Senior Management Consultant, PFM Asset Management. Topics to be covered include: differentiation between the Main Street and Wall Street approaches of portfolio management; demonstrating why suitability not total returns are the most appropriate and relevant methods for measuring portfolio performance and stewardship; reviewing the current and future expected U.S. economy and the related economic indicators; discussion on the benefits of a cash flow analysis; review of the risk/reward trade off for various investment strategies; and discuss the steps for developing an investment strategy used in making investment decisions for investment portfolios.

If you are located in the counties served by the Nature Coast Chapter or have interest in our chapter, we welcome you as a member. Annual membership dues are only

\$15. Our quarterly meetings are centrally located in the area we serve. For the nominal price of \$20 for members or \$35 for non-members, you'll receive lunch and three hours of CPE credit. For more information, please check the chapter information on the FGFOA Web site or contact Melisa Lowe at melisa.lowe@SWFWMD.state.fl.us or (352) 796-7211, ext. 4119.

Palm Beach Chapter

Jeff Price, City of Greenacres

The Palm Beach County Chapter held its first business luncheon meeting for 2007-2008 on August 23, 2007, at the Airport Hilton. A presentation titled "SAS 112, Communicating Internal Control Related Matters Identifiable in an Audit" was presented by Ron Bennett with Nowlen, Holt & Miner, CPA. This presentation gave the audience insight on the general provisions and the new definition of material weaknesses and significant control deficiencies in audits. The chapter provided a certificate of CPE credits for all attendees of this meeting.

The chapter's next meeting will be held on October 25, 2007, at the Airport Hilton. The topic will be "Fraud in Government Agencies" presented by speaker Jodi Swargen with RSM McGladrey, Inc.

Our meeting notices, chapter happenings and events are done by e-mail only, so contact Victoria Guinn at vguinn@ci.boca-raton.fl.us to be placed on the meeting notification list if you are not a member or would like to become a member. Membership applications went out the first week in May for new members and renewals. Please renew early and encourage other qualified members in your organization to join our chapter for the training and networking opportunities provided.

Panhandle Chapter

Amanda Lewis, Leon County Sheriff's Office

On July 20, 2007, the Panhandle Chapter enjoyed speakers Mike Diehl, Vice President, SunTrust Bank, who spoke on "Reducing the Cost of Debt Issuance" and "Current Trends in Treasury Management for Local Governments" and Vicky Shetty, CTP, SunTrust Bank, who presented "Payments Environment under Significant Change."

The new Board of Directors was sworn in and outgoing President Gary Stanford was thanked and acknowledged for his years of service on the Board.

Vice President Dave Skarsynski solved the question, "What do we do with all the chapter paperwork?" during his tenure as treasurer/ secretary, by scanning the chapter's documents. Many thanks to Dave! It should make the passing of chapter history quite a bit lighter.

Four quarterly meetings have been tentatively scheduled for the 2007-2008 year:

Friday, November 16, 2007
 Friday, January 11, 2008
 Friday, April 18, 2008
 Friday, July 18, 2008
 (Subject to change)

These dates and the associated CPE topics will be updated and listed in the local chapter section of the FGFOA Web site. The quarterly luncheon meetings are held from 10:30 a.m. - 2:30 p.m. (Central Time) at the Best Western Crossroads Inn in DeFuniak Springs at I-10 Exit 85.

We're looking forward to an update on property tax issues from speaker Alan Rosenzweig, Assistant County Administrator for Leon County, on November 16, 2007.

I invite and encourage you to join us for educational and networking opportunities throughout the year. Meeting information and membership applications are available on the FGFOA Web site or by contacting Charlotte Dunworth, Secretary/Treasurer, at cdunworth@fwb.org or me at lewisa@leoncountyfl.gov.

Space Coast Chapter

Michele Ennis, City of Melbourne

The Space Coast Chapter held a four-hour CPE training session on August 10, 2007, at the Melbourne International Airport. The City of Palm Bay facilitated the training and members of our chapter spoke on topics including a FEMA update, FLSA and SAS 112. More than 30 members were in attendance.

Membership renewals continue to be processed and we are pleased to announce that we currently have 78 members. This is a 30 percent increase over the previous year and we are excited to have some new faces and new ideas to compliment our seasoned members.

The following meetings have been tentatively scheduled for the 2007-2008 year:

Friday, October 5, 2007 - Mimi's Cafe - 8:00 a.m.
 Friday, November 2, 2007 - 12:00 p.m. - 5:00 p.m. - Brevard County Sheriffs Office (Viera)
 Friday, December 14, 2007 - Christmas Luncheon - TBA
 Friday, February 8, 2008 - 12:00 p.m. - 5:00 p.m. - Brevard County Sheriffs Office (Viera)
 Friday, April 18, 2008 - Annual Meeting
 Friday, June 20, 2008 - 12:00 p.m. - 5:00 p.m. - TBA
 Friday, August 8, 2008 - Breakfast meeting

If you are interested in becoming a member of the Space Coast Chapter or if you have any questions about our chapter activities, please contact Michele Ennis at mennis@melbourneflorida.org.

Treasure Coast Chapter

Carl Trabulsy, St. Lucie County Fire District

The Treasure Coast Chapter met on September 14, 2007, in the conference room of the Springhill Suites in Port St. Lucie. Our speaker for this meeting was Lisa Miller from Wachovia Bank. Lisa is a receivables product consultant and discussed lockbox, EDI, cash concentration, electronic bill payment and presentment, check conversion and new image services. December is right around the corner and the Treasure Coast Chapter has talked about having a holiday gathering. If anyone has done this before or has any suggestions, please contact Carl Trabulsy at carltrabulsy@slcfd.org.

Member Spotlight



Amanda Lewis, CPA, CGFO

Amanda Lewis, CPA, CGFO, is the Fiscal Operations Manager for the Leon County Sheriff's Office as well as the 2006-2007 President of the Panhandle Chapter of the FGFOA. She has served admirably as vice president, secretary/treasurer and Board member for the local chapter, in addition to serving on numerous chapter committees. As the current president, she already has presented several concepts that should be beneficial for the chapter.

Amanda has been employed by the Leon County Sheriff's Office as their Finance Director since January 2005. Before that, she was employed by the Leon County Clerk of Court from September 1993 to January 2005 as Board Accounting Supervisor. In her position with the Clerk, Amanda worked closely with Christine Francis and Bill Bogan, both of whom are very active with the FGFOA on a state level.

On a personal note, Amanda graduated from the University of Maryland with an English degree, but later on took additional accounting courses and sat for her CPA exam in Maryland. As a child, she lived in a commune with her family. Amanda has raised three beautiful daughters, Jessica, Juliet and Dale. All three have graduated from high school and are pursuing careers or continuing their education. She is extremely proud of their accomplishments. Amanda also has a cabin in the North Carolina mountains and has land in Arkansas where her mother was from. As a recreational hobby, Amanda enjoys swimming and is very fond of her dogs and cats.

In Memoriam

Rhett D. Harrell, FGFOA member since 1974

Rhett D. Harrell, age 59, passed away on September 18, 2007, from a rare form of neuroendocrine cancer diagnosed on August 15, 2007. Born in Miami, Florida, Rhett was a 1965 graduate of Pompano Beach High School, a graduate of Broward Junior College and a 1969 graduate of Florida State University with a degree in Accounting. Prior to forming his own practice, Rhett served as Finance Director for the City of Kissimmee, was an Assistant Director for the Government Finance Officers Association and worked for Touche Ross in Atlanta. Many of us knew Rhett through his frequent speaking engagements at FGFOA's educational events. He was a true professional, had a passion for teaching and will be deeply missed by all who knew him.

Employment Announcements

This is a condensed listing of postings. Visit www.fgfoa.org for a complete job posting description.

Accountant - Orange County Comptroller's Office.

Submit application and resume to: Orange County Government, Human Resources Division, P.O. Box 1393, 450 E. South Street, Orlando, FL 32802-1393, or fax to the Human Resources Division at (407) 836-2913.

Accountant Supervisor - Orange County Comptroller's Office.

Submit application and resume marked with position number to: Orange County Government, Human Resources Division, P.O. Box 1393, 450 E. South Street, Orlando, FL 32802-1393, or fax to the Human Resources Division at (407) 836-2913.

Finance and Accounting Manager - Lee County Justice Center Annex.

Position Number: 22010840-S07-16. How to apply: www.ca.cjis20.org.

Finance Director - Miami Shores Village. Submit resume with current salary information to: Village Clerk, 10050 N.E. 2nd Avenue, Miami Shores, FL 33138 or e-mail to: estepb@miamishoresvillage.com.

Strategic Planner - City of Gainesville. Interested applicants are to apply online at www.cityofgainesville.org.

Accounting and Purchasing Specialist - Port of Palm Beach District. Apply via e-mail to: humanresources@portofpalmbeach.com.

Chief Financial Officer - School Board of Sarasota County. Apply online at www.Sarasota.k12.fl.us/humres/.

Senior Accountant - City of Parkland

Submit with cover letter, salary history and resume to: City of Parkland, Human Resources Department, 6600 University Drive, Parkland, FL 33073. www.cityofparkland.org.

Accountant - City of Ocoee. Applications may be obtained from the Human Resources Department, 150 N. Lakeshore Drive, Ocoee, FL 34761.

Financial Services Director - Flagler County
E-mail jmayer@fcbcc.org. www.flaglercounty.org.

Accounting Grants Coordinator - City of Cape Coral.
Please apply online at www.capecoral.net/jobs.

Assistant to the Finance Director - Boynton Beach.

Number 07-039 www.boynton-beach.org. Fax completed applications to (561) 742-6274. E-mail Hr@ci.boynton-beach.fl.us.

Director Finance/Treasurer - Boynton Beach

Number 07-054. www.boynton-beach.org. Fax completed apps to (561) 742-6274. E-mail: Hr@ci.boynton-beach.fl.us.

Accountant - City of Lake Wales. How to apply: Send resume/application to Human Resources Department, City of Lake Wales, P.O. Box 1320 Lake Wales, FL 33859-1320, or to the following e-mail address: sdavis@cityoflakewales.com.

Assistant Director of Finance - City of Belle Glade. Contact: Patrice Monaco, CGFO, City of Belle Glade, Director of Finance, phone: (561) 996-0100, fax: (561) 992-2215 or PMonaco@belleglade-fl.com.

Finance Supervisor - City of Clermont. Applications or resumes may be mailed to the City of Clermont, P.O. Box 120219, Clermont, FL 34712 or faxed to (352) 394-4082 to the attention of Joseph E. Van Zile, Administrative Services Director. Resumes may also be e-mailed to jvanzile@clermontfl.org.

Accountant - City of Oakland Park

Submit application and resume to Human Resources Dept., City of Oakland Park, 3650 N.E. 12th Avenue, Oakland Park, FL 33334 or download the application online at www.oaklandparkfl.org.

Finance Director - Miami Springs. Mail resume to the Human Resources Director, 201 Westward Drive, Miami Springs, FL 33166, or e-mail: boucherl@miamisprings-fl.gov. Faxes not accepted. www.miamisprings-fl.gov.

City of Palm Bay - Paymaster. How to apply: www.palm-bayflorida.org/Departments/HR/human.htm
Department of Human Resources, 120 Malabar Road, Palm Bay, FL 32907, (321) 952-3421

Finance Director - St. Lucie County

How to apply: Submit resume to Human Resource, 2300 Virginia Ave., Ft. Pierce, FL 34982 or joanneb@co.st-lucie.fl.us.

Financial Services Director - City of Fort Myers

How to apply: www.cityftmyers.com, mailing address: City of Fort Myers, Human Resources Department, P.O. Box 2217, Fort Myers, FL 33902, phone: (239) 332-6320, fax: (239) 338-2240

Capital and Bond Fund Supervisor - West Palm Beach.

How to apply: Submit an official City of West Palm Beach application to the Department of Human Resources, 1000 45th Street, Suite number 12, West Palm Beach, FL 33407. Applications are available at www.wpb.org.

Chief Accountant - City of Winter Park.

Apply to: City of Winter Park, 401 Park Avenue South, Winter Park, FL 32789, (407) 599-3653, www.cityofwinterpark.org.

Finance Director - City of Bunnell

Application available at City Hall or at: www.bunnellfl.gov/office2.com. Please send application/resume to the City Clerk/HR, P.O. Box 756, Bunnell, FL 32110.

Municipal Services Director - Town of Lauderdale by the Sea. Applications available at Town Hall, 4501 Ocean Drive, Lauderdale by the Sea, FL or via lbtsobrien@bell-south.net.

Development Services Director - Town of Lauderdale by the Sea. Applications available at Town Hall, 4501 Ocean Drive, Lauderdale by the Sea, FL or via lbtsobrien@bellsouth.net.

Customer Billing and Assessment Manager - City of Cape Coral. An online application and resume are required for consideration. For more information or to apply, please visit our web site: www.capecoral.net/jobs

Accounting Supervisor - Broward County Sheriff's Office. You may view a detailed job description and apply online at www.sheriff.org.

Local Area Network (LAN) Administrator - City of Tavares. To apply: a City of Tavares employment application or resume with a minimum of 10 years complete work history must be submitted to City of Tavares Human Resources.

Finance Director - City of Fort Meade. Submit resume with salary history information to: dware@cityoffortmeade.com.

Budget Officer – City of Plant City

Submit cover letter, resume and salary history to Human Resources Department, 302 W. Reynolds Saint, Plant City, FL 33563 or sbush@plantcitygov.com.

City of Gainesville. The City Auditor's Office is currently recruiting for a qualified professional possessing or pursuing a CPA or CIA certification with one year of experience in auditing, program evaluation, financial, management or operational analysis. Apply online at www.cityofgainesville.org.

Part Time Staff Accountant - St. Petersburg Neighborhood Housing Services, Inc. Please send responses to: Deborah Scanlan, Vice President & CFO, St. Petersburg Neighborhood Housing Services, Inc. 1600 Dr. Martin L. King Street S. St. Petersburg, FL 33701. phone: (727) 821-6897, ext.108, fax: (727) 821-7457. E-mail: deborah.scanlan@stpetenhs.org.

Accountant - City of Coral Springs. Apply online at www.coral springs.org, employment and submit inquires to csjobs@coralsprings.org.

Accountant - City of Aventura. Official city application required and is online under Employment Opportunities at www.cityofaventura.com or at the Aventura Government Center, 19200 W. Country Club Drive, Aventura, FL. Fax to (305) 466-8939 or mail.

Director, Finance/Treasurer - Grade 43 - City of Boynton Beach. Apply to the Human Resources Department Monday through Friday before 5:30 p.m.

Assistant to the Director of Financial Services - City of Boynton Beach. Position inquiries should be directed to Bill Mummert, Director of Financial Services at (561) 742-6311.

Finance Director - Sumter County. Salary range \$69,883 - \$111,743. Resumes may be mailed to Clerk of Court, P.O. Box 247, Bushnell, FL 33513 or greynolds@sumterclerk.com.

Assistant Finance Director - North Bay Village
Please forward resume and salary requirements to City Clerk, City of North Bay Village, Human Resources Department, 1666 Kennedy Causeway, Suite 700, North Bay Village, FL 33141 or fax to (305) 865-9423.



**2007 School of
Governmental Finance
Registration Now Open!
November 12-16, 2007
PGA National Resort & Spa
Palm Beach Gardens, Florida**

The following is the listing of course offerings by track.

BASIC/INTERMEDIATE

Monday, November 12

8:00 a.m. - 9:40 a.m.

Governmental Accounting Part 1 – The Story Begins (2 hr - AA)

Developing Financial Policies & Procedures (2 hr - TB)

How Sweet It Is – How to Find the Hand in the Cookie Jar (2 hr - TB)

10:00 a.m. - 11:40 a.m.

Governmental Accounting Part 2 – The Sequel (2 hr - AA)

Records Management & Retention (2 hr - TB)

Bond Ratings and the Ratings Process (2 hr - TB)

1:00 p.m. - 2:40 p.m.

Governmental Accounting Part 3 – Will it all Balance Out! (2 hr - AA)

Introduction to Budgeting (2 hr - TB)

Understanding and Utilizing Economic Indicators (2 hr - TB)

3:00 p.m. - 4:40 p.m.

Introduction to MD&A (2 hr - AA)

Cheap I.T. Tricks You Never Knew You Had (2 hr - TB)

TRIM Requirements – Are You in Compliance? (2 hr - TB)

Tuesday, November 13

8:00 a.m. - 9:40 a.m.

Distinguished Budget Program – The Dos and the Don'ts (2 hr - TB)

The Basics of Banking and Technology (2 hr - TB)

The Bond Process A-M (2 hr - TB)

10:00 a.m. - 11:40 a.m.

Government Audit Update from a Financial Managers

Perspective Part 1 (2 hr - AA)

Budgeting in the Info Age (2 hr - TB)

The Bond Process N-Z (2 hr - TB)

1:00 p.m. - 2:40 p.m.

Government Audit Update from a Financial Managers

Perspective Part 2 (2 hr - AA)

So – You Want To Be a CGFO/ I'd Like to Work on a Committee (2 hr - TB)

The Good, the Bad, and the Ugly of Banking Services RFPs (2 hr - TB)

3:00 p.m. - 4:40 p.m.

It's a GAAS (2 hr - AA)

Effective Leadership Styles (2 hr - BEH)

Debt Policy & Capacity – Why Every Entity Should Have One (2 hr - TB)

Wednesday, November 14

8:00 a.m. - 9:40 a.m.

Internal Controls/Fraud – Know Your Exposure (2 hr - AA)

Capital Projects Prioritization – How Does Your Process Stack Up? (2 hr - TB)

Bonds, Initial & Ongoing Disclosure – What Everyone Wants to Know (2 hr - TB)

10:00 a.m. - 11:40 a.m.

RFPs – Can Your Process Withstand the Scrutiny? (2 hr - TB)

GFOA Budget Committee's Recommended Budget Practices (2 hr - TB)

Tools for Making Investment Decisions (2 hr - TB)

INTERMEDIATE/ADVANCED

Wednesday, November 14

1:00 p.m. - 2:40 p.m.

Are Your Retirement Plans Sustainable? (2 hr - TB)

Multi-Year Budgeting – Looking Beyond One Year (2 hr - TB)

Recent IRS Bond Market Enforcement Efforts (2 hr - TB)

3:00 p.m. - 4:40 p.m.

Developing an Effective Fund Balance Policy (2 hr - TB)

Motivating Staff/Team Building – You Can't Do It All Yourself (2 hr - BEH)

The Investment Portfolio Game: Putting Your Strategies to the Test (2hr - TB)

Thursday, November 15

8:00 a.m. - 9:40 a.m.

Legislative Update/Tax Reform – What You Need to Know (2 hr - TB)

What are Performance Measures and What Do They Mean to You? (2 hr - TB)

OPEB Issues and Implementation – Are You Ready? (2 hr - TB)

10:00 a.m. - 11:40 a.m.

Auditor General Update (2 hr - AA)

FGFOA Board Discussion of Emerging Issues (2 hr - TB)

Understanding the Arbitrage Calculation & Compliance Process (2 hr - TB)

1:00 p.m. - 2:40 p.m.

Balancing the Budget after Property Tax Reform without Revenue Increases (2 hr - TB)

Economic Update – a Look into the Crystal Ball (2 hr - TB)
Are Catastrophe Bonds in Your Future? (2 hr - TB)

3:00 p.m. - 4:40 p.m.

Annual Financial Report – Is a New System on the Horizon? (2 hr - AA)

Fiduciary Responsibility and Liability (2 hr - TB)

Debt Pools – Testing the Waters (2 hr - TB)

Friday, November 16

8:00 a.m. - 9:40 a.m.

Running an Efficient Finance Office (2 hr - BEH)

Portfolio Management Software Alternatives (2 hr - TB)

8:00 a.m. - 11:40 a.m.

Ethics Seminar (4 hr - ETHICS)

Additional and pre-registration required

10:00 a.m. - 11:40 a.m.

Dealing with Revenue Reductions/New Revenue Opportunities (2 hr - TB)

Demystifying the SWAP Market (2 hr - TB)

FGFOA Calendar at a Glance

November 2007

12-16 2007 FGFOA School of Governmental Finance – PGA National Resort & Spa, Palm Beach Gardens

May 2008

18-21 2008 FGFOA Annual Conference Hyatt, Jacksonville Jacksonville

June 2008

22-25 2008 GFOA Annual Conference Fort Lauderdale

November 2008

17-21 2008 FGFOA School of Governmental Finance – Hilton, St. Petersburg

May 2009

May 30- June 3, 2009 FGFOA Annual Conference Tampa Marriott Waterside Tampa

June 2009

June 28-July 1, 2009 GFOA Annual Conference Seattle, Washington

November 2009

16-20, 2009 FGFOA School of Governmental Finance – Hilton, St. Petersburg St. Petersburg