



**Florida Government Finance Officers Association, Inc  
Meeting of the Board of Directors**

**Friday, August 22, 2025**

**Loews Sapphire Resort  
6601 Adventure Way, Orlando, FL 32819**

**Grand Caribbean 8-9  
9:00 am**



# **FGFOA Mission**

*2024-2025*

**The FGFOA is dedicated to being your professional resource by providing opportunities through Networking, Education, Information and Leadership.**

## **Networking**

- Promoting relationships among peers
- Cultivating strong relationships with other organizations
- Enhancing relationships with the Local Chapters

## **Education**

- Creating balanced and cost-effective educational programs
- Utilizing various methods of delivery
- Enhancing cooperative training partnerships
- Promoting attainment and retention of certified officials

## **Information**

- Delivering information through innovation
- Providing feedback and analysis on emerging legislative and technical issues
- Facilitating information sharing for members

## **Leadership**

- Providing opportunities for individual development
- Recognition of the FGFOA's governmental finance expertise
- Recruiting, mentoring and promoting leaders within our organization
- Recognizing member achievements



Florida Government  
Finance Officers Association

## FGFOA BOARD MEETING

August 22, 2025

### Attendance

NOT  
PRESENT

PRESENT

#### OFFICERS

		Nicole Gasparri	President
		Kelly Strickland	President-Elect
		Melissa Burns	Secretary/Treasurer

#### DIRECTORS

			1st Term	2nd Term
		Sharon Almeida	2023-2026	
		Nicole Jovanovski	2022-2025	2025-2028
		Missy Licourt	2021-2024	2024-2027
		Anna Otiniano	2024-2027	
		Rebecca Schnirman	2022-2025	2025-2028
		William Spinelli	2025-2026	
		Allison Teslia	2024-2027	
		Stephen Timberlake	2025-2028	

#### IMMEDIATE PAST PRESIDENT

		Rip Colvin
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#### OTHERS IN ATTENDANCE

		Paul Shamoun	Florida League of Cities
		Jill Walker	Florida League of Cities
		Karen Pastula	Florida League of Cities



## **FGFOA BOARD OF DIRECTORS MEETING AGENDA**

**DATE/TIME:**     **August 22, 2025**  
                      **9:00 am**  
                      **Grand Caribbean Room 8-9**  
                      **Loews Sapphire Resort**  
                      **6601 Adventure Way, Orlando, FL 32819**

- I.    Call to Order – Nicole Gasparri, President**
- II.   Roll Call**
- III.   Consideration of Minutes – July 11, 2025**
- IV.   Report of Officers**
  - A.   President – Nicole Gasparri**
    - 1.   Certification Committee Chair Assignment**
  - B.   President Elect – Kelly Strickland**
  - C.   Secretary Treasurer – Melissa Burns**
- V.   Executive Director – Paul Shamoun**
  - i.   Membership Report**
  - ii.   Investment Report**
- VI.   Committee Reports**
  - A.   Certification Committee – Board Liaison: Melissa Licourt**
  - B.   Conference Program Committee – Board Liaison: Anna Otiniano**
  - C.   Educational Programs Committee – Board Liaison: Stephen Timberlake**
  - D.   Event Host Committee – Board Liaison: Allison Tesla**



- E. Local Chapter Committee – Board Liaison: Nicole Gasparri**
  - i. Progress Update**
  - ii. Florida First Coast Local Chapter Bylaws Amendment**

- F. Professional Development Committee – Board Liaison: Bill Spinelli**

- G. School of Governmental Finance – Board Liaison: Sharon Almeida**

- H. Technical and Legislative Resources Committee – Board Liaison: Nicole Jovanovski**

- I. Communication Collaboration Committee– Board Liaison: Rebecca Schnirman**

**VII. Other Business**

- VIII. Next Meeting – Wednesday, October 29, 2025 – Location is Hyatt Regency Coconut Point, 5001 Coconut Rd, Bonita Springs, FL 34134. This will be in conjunction with the School of Governmental Finance.**

**FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.**

**BOARD OF DIRECTORS MEETING MINUTES**

**July 11, 2025**

The meeting of the FGFOA Board of Directors took place virtually on Friday, July 11, 2025.

**IN ATTENDANCE:**

**OFFICERS AND BOARD MEMBERS**

President – Nicole Gasparri, Director of Strategic Management and Professional Development, Palm Beach County Clerk of the Circuit Court & Comptroller  
President-Elect – Kelly Strickland, Director of Financial Administration, City of Sarasota  
Secretary-Treasurer – Melissa Burns, Finance Director, City of St. Augustine  
Director, Sharon Almeida, Finance Director, Royal Palm Beach  
Director, Nicole Jovanovski, Director of Finance, Sarasota County Clerk of the Circuit Court & Comptroller  
Director, Melissa Licourt, Finance Director, St. Johns River Water Management District  
Director, Rebecca Schnirman, Director of Financial & Support Services, Palm Beach County  
Director, Allison Teslia, Management & Budget Director, Lake County  
Director, Stephen Timberlake, Special Projects Manager, City of Boca Raton  
Immediate Past President, Rip Colvin, Executive Director, Justice Administrative Commission

**STAFF**

Paul Shamoun, Florida League of Cities  
Karen Pastula, Florida League of Cities  
Jill Walker, Florida League of Cities

**CALL TO ORDER**

There being a quorum, President Gasparri called the July 11, 2025, meeting of the FGFOA Board of Directors to order at 9:04 am.

**PRESIDENT REPORT**

**Minutes**

President Gasparri presented the minutes from the June 18, 2025, Board meeting for review.

**Mrs. Almeida moved, seconded by Ms. Teslia, to accept the June 18, 2025, minutes.** After the motion passed, Past President Colvin had minor administrative edits. **Motion passed without objection.**

**EXECUTIVE DIRECTOR REPORT**

**2025-2026 Budget**

Mr. Shamoun presented the proposed 2025-2026 budget. Mr. Shamoun reviewed the SOGF, Annual Conference, Leadership, Bootcamp, Board and CGFO budgets, noting an increase in Bootcamp registration costs from \$440 to \$500. It also anticipates an increase in net revenue, bringing reserves into alignment with the minimum net asset policy. Mr. Shamoun will update the Board throughout the year.

**Mrs. Almeida moved, seconded by Mrs. Schnirman, to approve the budget as presented as of July 1, 2025. Motion passed without objection.**

**Investment Policy and Resolution**

Mr. Shamoun presented the updated Investment Policy noting that Vanguard is requiring this policy be put into

place which allows the Florida League of Cities, at the request of the FGFOA Executive Board, to move money on behalf of FGFOA. This policy is being standardized across all of the Associations the FLC administers.

**Mr. Timberlake moved, seconded by Ms. Licourt, to approve the Investment Policy as presented authorizing the opening of investment accounts. Motion passed without objection.**

#### **2025-2026 Administrative Services Agreement**

Mr. Shamoun presented the updated 2025-2026 Administrative Agreement. After review, some grammatical errors were noted.

**Ms. Licourt moved, seconded by Mrs. Almeida, to approve the Administrative Services Agreement with these edits. Motion passed without objection.**

#### **CGFO Plaque**

Mr. Shamoun recommended allowing the purchase of CGFO plaques by people who had previously earned them but were only awarded a certificate. The recommended rate is \$75 per plaque to cover the cost of production and shipping. Staff will work on establishing the process and will notify all those that qualify to purchase the plaque.

**Mrs. Almeida moved, seconded by Ms. Licourt to approve allowing the purchase of CGFO plaques by people who had previously earned them but were only awarded a certificate, at the cost of \$75.00. Motion passed without objection.**

#### **NEXT MEETING**

The date for the next Board meeting will be on Friday, August 22, 2025, at Loews Sapphire Falls Resort at Universal Orlando.

**ATTEST:**

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**Melissa Burns, Secretary/Treasurer**



**FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.**  
**2025-2026 Board of Directors**  
**President Agenda Item**

**2025-2026  
BOARD OF DIRECTORS**

**OFFICERS**

**President**

**Nicole Gasparri**

**President-Elect**

**Kelly Strickland**

**Secretary/Treasurer**

**Melissa Burns**

**DIRECTORS**

**Sharon Almeida**

**Nicole Jovanovski**

**Melissa Licourt**

**Anna Otiniano**

**Rebecca Schnirman**

**William Spinelli**

**Allison Teslia**

**Stephen Timberlake**

**PAST PRESIDENT**

**Rip Colvin**

**EXECUTIVE DIRECTOR**

**Paul Shamoun**

**Meeting Date: August 22, 2025**

**Title of Item: Certification Committee Chair Assignment**

**Executive Summary, Explanation or Background:**

There has become an open seat for the Certification Committee Chair. Jonathan McKinney has agreed to step-in for the remainder of the 2025-2026 fiscal year as the Certification Committee Chair. An updated listing of all committee chairs is attached for review.

**Recommended Action: Approval**

*Nicole Gasparri*

**Nicole Gasparri,  
FGFOA President**

August 8, 2025

**Date**



## FGFOA Committee Chairs 2025-2026

### Certification Committee

**Jonathan C. McKinney, CGFO, FRA-RP**

Director of Finance  
City of Deltona  
2345 Providence Blvd  
Deltona, FL 32725-1806  
Work: (386) 878-8100  
[jmckinney@deltonafl.gov](mailto:jmckinney@deltonafl.gov)

**Co-Chair: Teri Butler**

**Board Liaison: Missy Licourt**

**Staff Liaison: Karen Pastula**

### Conference Program Committee

**Sarah Simpson, CPA, CGFO**

Budget Manager  
City of Aventura  
19200 W Country Club Dr  
Aventura, FL 33180-2403  
Work: (305) 466-8951 Cell (954) 589-7893  
[simpsons@cityofaventura.com](mailto:simpsons@cityofaventura.com)

**Co-Chair: Ben Salz**

**Board Liaison: Anna Otiniano**

**Staff Liaison: Jill Walker**

### Educational Programs Committee

**Wayne Meyer**

Director of Operations  
Justice Administrative Commission  
227 N Bronough Street  
Suite 2100  
Tallahassee, FL 32301  
(805) 488-2415  
[wayne.meyer@justiceadmin.org](mailto:wayne.meyer@justiceadmin.org)

**Co-Chair: Katie Roundtree**

**Board Liaison: Stephen Timberlake**

**Staff Liaison: Karen Pastula**

### Event Host Committee

**Tameka Blake**

Budget Analyst  
City of Boca Raton  
201 W Palmetto Park Road  
Boca Raton, FL 33432  
(561) 393-7821  
[TBlake@myboca.us](mailto:TBlake@myboca.us)

**Co-Chair: Carlisha Jenkins**

**Board Liaison: Allison Tesla**

**Staff Liaison: Jill Walker**

### Local Chapter Committee

**Jamie Roberson, CGFO**

Deputy Chief of Operations  
Martin County Clerk of the Circuit Court & Comptroller  
100 SE Ocean Blvd.  
Stuart, FL 34994  
Work (772) 221-7414  
[jroberson@martinclerk.com](mailto:jroberson@martinclerk.com)

**Board Liaison: Kelly Strickland and Nicole Gasparri**

**Staff Liaison: Jill Walker**

### Professional Development Committee

**Kadem V. Ramirez**

Deputy Finance Administrator  
City of Palm Beach Gardens  
10500 N Military Trail  
Palm Beach Gardens, FL 33410  
Work: (954) 940-2947  
[kramirez@pbgfl.com](mailto:kramirez@pbgfl.com)

**Co-Chair: Bill Bowers**

**Board Liaison: Bill Spinelli**

**Staff Liaison: Karen Pastula**

### 2025 SOGF Committee

**Elizabeth Anne Walter, MBA, CGFO, CPFIM**

Budget & Grants Manager  
South Florida Regional Transportation Authority  
801 NW 33rd St  
Pompano Beach, FL 33064-2013  
Work (954) 788-7882  
[waltere@sfrta.fl.gov](mailto:waltere@sfrta.fl.gov)

**Co-Chair: TBD**

**Board Liaison: Sharon Almeida**

**Staff Liaison: Karen Pastula**

### Technical and Legislative Resources Committee

**Ajay Gajjar**

Finance Director  
Hillsborough County Clerk of the Circuit Court  
PO Box 1110  
Tampa, FL 33601  
(813) 307-7026  
[gajjar@hillsclerk.com](mailto:gajjar@hillsclerk.com)

**Co-Chair: Derek Noonan**

**Board Liaison: Nicole Jovanovski**

**Staff Liaison: Jill Walker**

### Communication Collaboration Ad-Hoc Committee

**Rebecca Schnirman**

Director of Financial & Support Services, Palm Beach County  
2700 6th Ave S  
Lake Worth, FL 33461-4727  
Work: (561) 966-6650 Cell (561) 308-0694  
[RSchnirman@pbc.gov](mailto:RSchnirman@pbc.gov)



**FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.**  
**2025-2026 Board of Directors**  
**Executive Director Agenda Item**

**2025-2026  
BOARD OF DIRECTORS  
OFFICERS**

**President**  
Nicole Gasparri

**President-Elect**  
Kelly Strickland

**Secretary/Treasurer**  
Melissa Burns

**DIRECTORS**  
Sharon Almeida

Nicole Jovanovski

Melissa Licourt

Anna Otiniano

Rebecca Schnirman

William Spinelli

Allison Tesla

Stephen Timberlake

**PAST PRESIDENT**  
Rip Colvin

**EXECUTIVE DIRECTOR**  
Paul Shamoun

**Meeting Date: August 22, 2025**

**Title of Item: Membership Report**

**Executive Summary, Explanation or Background:**

<b>Membership Paid</b>	<b>08/08/25</b>	<b>06/30/2025</b>	<b>06/30/2024</b>
<b>Government:</b>	1,054	2,734	2,715
<b>Associate:</b>	55	384	238
<b>Lifetime/Retired:</b>	47	58	41
<b>Student:</b>	20	26	15
<b>Total:</b>	<b>1,176</b>	<b>3,202</b>	<b>3,009</b>

**CGFO**

**Total number of members with CGFO: 552**

**Total applications since July 1, 2025: 9**

**Recommended Action:**

**Paul Shamoun,  
Executive Director**

August 8, 2025

**Date**

**FGFOA Listserve Report June 1, 2025 thru August 11, 2025**

<b><u>List Title</u></b>	<b><u>Number of Subscribers</u></b>
Accounting, Auditing & Financial Reporting	637
Budgeting	565
Debt & Treasury	352
Financial Administration	577
Personnel & Payroll	379

**Accounting & Auditing**

[Annual Investment Training](#) (5 Messages)  
[BS & A - ADHOC and UB Reports](#) (1 Message)  
[DOGE-Request Letter](#) (1 Message)  
[Emergency Financial Plans](#) (1 Message)  
[FY2026 Budget for COLA and Merit](#) (11 Messages)  
[GASB 18 – Clarification on Closure/Post-Closure Liability Recognition](#) (2 Messages)  
[GASB96 Resolution](#) (1 Message)  
[Inquiry: Arbitrage Rebate Report Vendors](#) (7 Messages)  
[Local TIF Agreements](#) (1 Message)  
[Reporting interest on foreclosure surplus](#) (1 Message)  
[Request for Policies on Unassigned Fund Balance and Emergency Reserve](#) (2 Messages)  
[Stormwater meeting](#) (13 Messages)  
[Travel Policy](#) (3 Messages)  
[Vendor Deposits Requests](#) (3 Messages)  
[\[EXTERNAL SENDER\] - FY2026 Budget for COLA and Merit](#) (1 Message)  
[\[EXTERNAL SENDER\] - Re: Stormwater meeting](#) (1 Message)  
[\[EXTERNAL\] FY2026 Budget for COLA and Merit](#) (1 Message)

**Budgeting**

[Assistant City/County Managers](#) (7 Messages)  
[Seeking Recommendations for PCI Compliance Audit Vendors](#) (1 Message)

**Debt & Treasury**

[\[EXTERNAL\] Custodian](#) (1 Message)

**Financial & Administration**

[Cell Tower Lease](#) (1 Message)  
[Credit Card fees](#) (8 Messages)  
[DOGE Request Letter](#) (2 Messages)  
[Government-Owned Property Leases](#) (3 Messages)  
[Local TIF Agreement](#) (1 Message)

[Non Profit Policy and Procedures](#) (1 Message)  
[QuickBooks Conversion](#) (1 Message)  
[Request for ACH Policy Samples with Internal Controls](#) (1 Message)  
[Requesting the Auditor Prepare the ACFR](#) (6 Messages)  
[Small Government Accounting Software](#) (9 Messages)  
[Travel Policy](#) (1 Message)  
[Vacancy Fee](#) (1 Message)  
[Wage Compensation Study](#) (6 Messages)  
[\[EXTERNAL SENDER\] - Re: Credit Card fees](#) (2 Messages)  
[\[EXTERNAL SENDER\] - Re: Wage Compensation Study](#) (1 Message)  
[\[EXTERNAL:CAUTION!\]- Credit Card fees](#) (1 Message)  
[\[External\] Re: \[EXTERNAL SENDER\] - Re: Credit Card fees](#) (1 Message)

### **Personnel & Payroll**

[Drone Operator](#) (2 Messages)  
[Please share the budgeted EB rate.](#) (2 Messages)  
[Reporting Child Support Reporting for Independent Contractors](#) (2 Messages)





**FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.**  
**2025-2026 Board of Directors**  
**Executive Director Agenda Item**

**2025-2026  
BOARD OF DIRECTORS  
OFFICERS**

**President**  
Nicole Gasparri

**President-Elect**  
Kelly Strickland

**Secretary/Treasurer**  
Melissa Burns

**DIRECTORS**  
Sharon Almeida

Nicole Jovanovski

Melissa Licourt

Anna Otiniano

Rebecca Schnirman

William Spinelli

Allison Tesla

Stephen Timberlake

**PAST PRESIDENT**  
Rip Colvin

**EXECUTIVE DIRECTOR**  
Paul Shamoun

**Meeting Date: August 22, 2025**

**Title of Item: Investment Report**

**Executive Summary, Explanation or Background:**

**Content: Money Market Account**

<b>PURCHASED</b>	<b>BANK</b>	<b>AMOUNT</b>	<b>APY</b>	<b>TERM</b>	<b>MATURITY DATE</b>
<b>MONEY MARKET ACCOUNT</b>	Vanguard	\$171,251.19	4.39%		

**Recommended Action: Review**

**Paul Shamoun,  
Executive Director**

**August 8, 2025**

**Date**



**FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.**  
**2025-2026 Conference Program Committee**  
**Agenda Item**

**2025-2026**

**CHAIRPERSON**

**Sarah Simpson**

Budget Manager

City of Aventura

19200 W Country Club Drive

Aventura, FL 33180-2403

(305) 466-8951

[simpsons@cityofaventura.com](mailto:simpsons@cityofaventura.com)

**BOARD LIAISON**

**Anna Otiniano**

**COMMITTEE CO-CHAIR**

**Ben Salz**

**STAFF LIAISON**

**Jill Walker**

**Meeting Date: August 22, 2025**

**Title of Item: Updated Conference Program Committee  
Policies & Procedures Manual**

**Executive Summary, Explanation or Background:**

The Policies & Procedures Manual has been updated as red-lined and attached.

**Recommended Action:** The Board review and approve the updated Conference Program Committee Policies & Procedures Manual as revised.

*Sarah Simpson*

*7/29/25*

**Sarah Simpson,  
Conference Program Committee Chair**

**Date**



## **Florida Government Finance Officers Association Conference Program Committee Policies and Procedures Manual**

Revised [7/15/247/18/25](#)

### **I. Transition Plan**

- A. The Outgoing Committee Chairperson (the “Chair”) and Board Liaison (the “Liaison”) need to meet with the Incoming Chair and Liaison in order to provide for a smooth transition from one year to the next.
- B. The Outgoing Chair should provide the Incoming Chair with the template used for determining Annual Conference sessions (including speaker names and contact information from most recent Annual Conference).
- C. The Incoming Chair and Liaison should review the Committee Policies and Procedures Manual and update it as needed after the Annual Conference and the first Board Meeting in order to provide members with an updated manual at the beginning of the Committee year.

### **II. Purpose, Goals and Action Plan**

- A. Purpose: To plan and arrange the educational program at the Annual Conference by identifying a broad range of relevant topics and booking knowledgeable speakers.
- B. Short Range Goals:
  - 1) To provide stimulating educational and training opportunities for government financial professionals.
  - 2) To provide opportunities for government financial professionals to participate in exchanges of information and ideas.
  - 3) To provide leadership opportunities for government financial professionals.
  - 4) To provide public speaking opportunities for government financial professionals through session presentations and roles as moderators.
  - 5) To engage the membership by providing feedback and ideas.
- C. Long Range Goal: To improve the quality of financial and administrative management in government.

D. Action Plan:

- 1) Appoint one Subcommittee Chairperson (the "Sub Chair") for each program track.
- 2) Appoint one Sub Chair as Committee ~~Vice Chairperson~~ Co-Chair (the ~~"Vice ChairCo-Chair"~~), as needed to enable and provide for succession planning.
- 3) Assign Committee Members to the Subcommittees.
- 4) Request evaluations of speakers from the last Annual Conference and historical information on past speakers from the Florida League of Cities' (the "FLC") Staff Liaison.
- 5) Have the "Call for Session Topics" online submission portal ~~"re-launched" after the Annual Conference and again in late Summer/early Fall,~~ incorporated to the July, August and September newsletter items for the Committee.
- 6) Pull the data from the online submission portal and incorporate it accordingly.
- 7) Recommend topics for all Annual Conference sessions for FGFOA Board of Directors' (the "Board") approval.
- 8) Contact potential speakers for each session.
- 9) Obtain the Board's approval for speakers.
- 10) Provide contact information for each approved speaker to the FLC's Staff Liaison.

**III. Membership Structure**

- A. The Committee is generally composed of 20-30 members plus the Chair. This provides a sufficient number of members to accomplish the duties and responsibilities assigned to the Committee.
- B. The Chair is appointed by the FGFOA President and serves as overall coordinator (Chair MUST be an Active Government Member).
- C. The Chair appoints one Sub Chair for each major area of responsibility (Sub chairs MUST be Active Government Members). Those areas include:
  - 1) Accounting, Auditing, and Financial Reporting;

- 2) Budget, Economics, and Financial Planning ([Including the Procurement Pre-Annual Conference should the Committee gather relevant topics](#));
  - 3) Policy, Leadership, Strategic Planning, Personnel (Including the Leadership Pre-Annual Conference);
  - 4) Banking, Investment, Risk, Treasury Management, and Debt Management (Including the Investments Pre-Annual Conference); and
  - 5) Technology
- D. The Chair appoints one Sub Chair as the ~~Vice Chair~~[Co-Chair](#), as needed, for the purpose of providing added support to the Chair [and allowing for succession planning](#).
  - E. Each Sub Chair is responsible for coordination of activities associated with the tasks assigned to that Subcommittee.
  - F. Each Committee member is assigned to one or more of the Subcommittees.

#### IV. **Member Responsibilities**

- A. Chair
  - 1) Coordinates all major aspects of the Committee meetings.
    - a. Establishes times and places.
      - i. Meetings can be in person, by phone conference calls, or online.
        - The FLC arranges the initial “kick-off” Committee meeting that is held at the annual conference.
        - The FLC arranges conference calls and online meetings, if requested.
    - b. Conducts Committee meetings.
      - i. Prepares meeting agenda.
      - ii. Makes sure minutes of the meeting are taken.
    - c. Assists Sub Chairs’ activities.
    - d. Motivates and involves all Committee members.

2) Reports Committee activities.

- a. Keeps Committee members and Liaison apprised of Committee activity and progress.
- b. Prepares ~~and presents~~ reports about Committee progress for the Liaison and/or Committee Chair to present at the scheduled Board meetings.

~~\*—If unable to attend the meetings Committee Chairs are invited to attend, coordinates with the Liaison and/or Co-Chair for Committee report presentation. If unable to attend, coordinates with the Liaison and/or Vice Chair for Committee report presentation.~~

- 3) Prepares a report for the Annual Conference business luncheon, summarizing all Committee activities for the year.
- 4) Attends Annual Conference and assists in the smooth flow of sessions.
- 5) Assists with the transition of responsibilities to the new Liaison and Chair.
- 6) Sends an electronic version of the Annual Conference program schedule and session descriptions to the Incoming Chair to utilize as a guide.
  - a. Uploads final documents to the Committee Shared Folder created by the Staff Liaison.
- 7) Solicits additional Committee Members, if necessary.
- 8) Informs Committee Members of key dates/deadlines.
- 9) Coordinates with FLC administrative staff on administrative matters, as needed.

B. Vice Chair~~Co-Chair~~

- 1) Assists Chair in coordinating Committee activities.
- 2) Assists Chair in updating the speaker guidelines and moderator training presentation documents.

C. Subcommittee Chairs

- 1) Coordinate the Subcommittee meetings.
  - a. Establish meeting times and places.

- i. Meetings can be in person, by phone conference calls, or online.
    - The FLC arranges conference calls and online meetings, if requested.
  - b. Conduct Subcommittee meetings.
  - c. Assist the Chair and other Sub Chairs.
  - d. Motivate and involve all Subcommittee members.
- 2) Report Subcommittee activities.
  - a. Keep the Committee and Subcommittee members apprised of Subcommittee activity and progress.
  - b. Participate in periodic meetings between the Committee Chair and Sub Chairs.
  - c. Participate in periodic meetings of the Committee.
- 3) Attend Annual Conference and assist in the smooth flow of sessions.

D. [Committee](#) Members

—(Can be Government, Associate, Retiree, or Student Members of the [FGFOA](#))—

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- 1) Develop sessions for the Annual Conference.
  - a. Select topics for each session. Sessions shall be balanced among the five (5) main tracks and the Pre-Annual Conference using a combination of 100-minute, 75-minute and 50-minute sessions. The main tracks include:
    - i. Accounting, Auditing, and Financial Reporting.
    - ii. Budget, Economics, and Financial Planning.
    - iii. Policy, Leadership, Strategic Planning, Personnel.
    - iv. Banking, Investment, Risk, Treasury Management, and Debt Management.
    - v. Technology
    - vi. Investment and [Procurement](#)/Leadership Pre-Annual Conference: four 100 - minute sessions each (totaling 800 minutes of Continuing Professional Education).

- b. Create titles and short topic descriptions for inclusion in Annual Conference brochure.
  - c. Suggest speakers.
  - d. Obtain speakers' consents to present on specified topics.
  - e. Obtain speakers' contact information.
  - f. Obtain speaker engagement form from speaker (provide to Sub Chair and FLC by way of Annual Conference speaker's confirmation link).
- 2) Attend meetings as called, including but not limited to:
- a. The organizational meeting held at the Annual Conference.
  - b. Subsequent Committee meetings called by the Committee Chair.
  - c. Subcommittee meetings called by the Subcommittee Chair.

#### **V. Florida League of Cities' Responsibilities**

The FLC remains in contact with the Conference Program Chair and contacts the speakers as needed prior to the Annual Conference to request presentation materials, headshots and bios, if not included on the Annual Conference speaker's confirmation link.

#### **VI. Terms**

Members are appointed for a one-year term and are encouraged to continue on the Committee for at least three years to provide the institutional knowledge and experience necessary for successful operation of the committee.

#### **VII. Timeline**

- A. The Committee will hold an organizational meeting at the Annual Conference.
- B. The "Call for Session Topics" online submission portal will ~~launch within one month following the Annual Conference~~ be sent for Newsletter items for inclusion in the July, August and September editions.



- Data will be gathered and sent to the Committee Chair in the weeks following the initial launch.

~~• The “Call for Session Topics” will launch again in late Summer/early Fall and then throughout the year as needed.~~

- C. The Committee will convene a second meeting within one month of the Annual Conference.
- D. The Committee will develop a program schedule by day and time for Board approval in October.
- E. The Committee will complete session titles and descriptions by rank for Board approval in October.
- F. The Committee will provide the Board a list of speakers for each topic by the first meeting of the calendar year. The Committee will also verify the accuracy of topic title. Descriptions with speaker’s planned presentation must be approved by the Board.
- G. The Committee will finalize the roster of recommended speakers for the sessions by February for inclusion into the Annual Conference Announcement.
- H. The Committee will host a moderator training in March ~~or~~ April and/or May depending on the Conference date outlining protocol and responsibilities of the moderator.

- Two moderator trainings will take place:

- “Evolution Series” Moderator Training

- 2 months prior to the Conference

- “Regular” Moderator Training

- 1 month prior to the Conference

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## VIII. **Budget**

- A. Committee expenses must be approved by the Board.
  - 1) The annual budget provides for expenses associated with committee meetings, such as meals and conference calls.

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- 2) Expenses associated with national speakers for the Annual Conference from Governmental Accounting Standards Board (the "GASB"), FICPA, and the Government Finance Officers Association (the "GFOA"), must be approved by the Board in advance.

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#### **IX. Minutes, Reports and Correspondence**

- A. Minutes – The Chair must keep minutes of each meeting and maintain copies for use by the next Chair and Committee.
- B. Reports – A Committee report is required for each Board meeting. The report is transmitted as an agenda item and should include the status of the program schedule by session title, presenter, and description.
- C. Reports – An Annual Report is required from each Committee prior to the Annual Conference. This report should be a summary of the accomplishments of the Conference Program Committee for the year.
- D. Correspondence - Conference Program Committee agenda reports, quarterly and year-end reports will be due to the FLC periodically during the term. The deadlines will be provided by the FLC.
  - 1) All correspondence should be maintained in an electronic format and shared with the incoming Chair.

#### **X. Special Tasks**

##### A. FGFOA Website:

- a. Each month, the Committee Chair and Co-Chair will look over the pages related to the Conference Program Committee and provide suggested updates for the page to the Board Liaison.

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##### A.B. Feedback forms:

- a. Attendees will complete a feedback form, via the Annual Conference application (app) if available after each speaker or via the link sent in the FGFOA Conference Recap e-mail. This feedback is essential to the planning of the subsequent year's Annual Conference.

##### C. FGFOA Newsletter:

a. The Committee Chair will provide the Liaison a timeline of items for inclusion in the newsletter.

a.i. Some items will need to be updated after Board meetings.

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## **XI. General Considerations**

Any exceptions to these general considerations must be approved by the Board.

- A. Only Active Government Members may serve as Committee and Subcommittee Chairs.
- B. Vendor firms may only be represented at one session of the Annual Conference regular program. Exceptions may occur for one of the following reasons:
  - 1) A vendor firm may speak at a Pre-Annual Conference session as well as a regular session so long as the speaker from the firm that speaks at a regular session is different than the Pre-Annual Conference session speaker.
- C. Session speakers should be rotated in order to continually provide fresh speakers to the membership. This requirement shall apply to all speakers excluding quasi-governmental speakers from GASB, GFOA, FLC, FICPA, and FGFOA.
- D. Presenters are volunteers and do not receive compensation or expenses for their services.
- E. After the master schedule is approved by the Board and is submitted to the FLC, the Chair solicits volunteers to serve as Moderators. Moderators must be Active Members. The Chair shall reach out to the following, in order, to serve as Moderators.
  - 1) FGFOA Board of Directors;
  - 2) FGFOA Current Committee Chairs
  - 3) FGFOA Chapter Presidents and Board Members
  - 4) FGFOA Past Presidents;
  - 5) Annual Conference Program Sub Chairs and Committee members (regardless of membership type)

6) Leadership FGFOA Graduates; and

7) Membership at large [\(regardless of membership type\)](#).

- F. The Committee shall develop sessions utilizing multiple speakers and panel discussions when appropriate.
- G. The Committee should not schedule the Board for speaking engagements or moderating assignments for the session right after the Tuesday Business Luncheon.



# **Florida Government Finance Officers Association Conference Program Committee Policies and Procedures Manual**

**Revised 7/18/25**

## **I. Transition Plan**

- A. The Outgoing Committee Chairperson (the “Chair”) and Board Liaison (the “Liaison”) need to meet with the Incoming Chair and Liaison in order to provide for a smooth transition from one year to the next.
- B. The Outgoing Chair should provide the Incoming Chair with the template used for determining Annual Conference sessions (including speaker names and contact information from most recent Annual Conference).
- C. The Incoming Chair and Liaison should review the Committee Policies and Procedures Manual and update it as needed after the Annual Conference and the first Board Meeting in order to provide members with an updated manual at the beginning of the Committee year.

## **II. Purpose, Goals and Action Plan**

- A. Purpose: To plan and arrange the educational program at the Annual Conference by identifying a broad range of relevant topics and booking knowledgeable speakers.
- B. Short Range Goals:
  - 1) To provide stimulating educational and training opportunities for government financial professionals.
  - 2) To provide opportunities for government financial professionals to participate in exchanges of information and ideas.
  - 3) To provide leadership opportunities for government financial professionals.
  - 4) To provide public speaking opportunities for government financial professionals through session presentations and roles as moderators.
  - 5) To engage the membership by providing feedback and ideas.
- C. Long Range Goal: To improve the quality of financial and administrative management in government.

D. Action Plan:

- 1) Appoint one Subcommittee Chairperson (the “Sub Chair”) for each program track.
- 2) Appoint one Sub Chair as Committee Co-Chair (the “Co-Chair”), as needed to enable and provide for succession planning.
- 3) Assign Committee Members to the Subcommittees.
- 4) Request evaluations of speakers from the last Annual Conference and historical information on past speakers from the Florida League of Cities’ (the “FLC”) Staff Liaison.
- 5) Have the “Call for Session Topics” online submission portal incorporated to the July, August and September newsletter items for the Committee.
- 6) Pull the data from the online submission portal and incorporate it accordingly.
- 7) Recommend topics for all Annual Conference sessions for FGFOA Board of Directors’ (the “Board”) approval.
- 8) Contact potential speakers for each session.
- 9) Obtain the Board’s approval for speakers.
- 10) Provide contact information for each approved speaker to the FLC’s Staff Liaison.

**III. Membership Structure**

- A. The Committee is generally composed of 20-30 members plus the Chair. This provides a sufficient number of members to accomplish the duties and responsibilities assigned to the Committee.
- B. The Chair is appointed by the FGFOA President and serves as overall coordinator (Chair MUST be an Active Government Member).
- C. The Chair appoints one Sub Chair for each major area of responsibility (Sub chairs MUST be Active Government Members). Those areas include:
  - 1) Accounting, Auditing, and Financial Reporting;
  - 2) Budget, Economics, and Financial Planning (Including the Procurement Pre-Annual Conference should the Committee gather relevant topics);

- 3) Policy, Leadership, Strategic Planning, Personnel (Including the Leadership Pre-Annual Conference);
  - 4) Banking, Investment, Risk, Treasury Management, and Debt Management (Including the Investments Pre-Annual Conference); and
  - 5) Technology
- D. The Chair appoints one Sub Chair as the Co-Chair, as needed, for the purpose of providing added support to the Chair and allowing for succession planning.
  - E. Each Sub Chair is responsible for coordination of activities associated with the tasks assigned to that Subcommittee.
  - F. Each Committee member is assigned to one or more of the Subcommittees.

#### **IV. Member Responsibilities**

##### **A. Chair**

- 1) Coordinates all major aspects of the Committee meetings.
  - a. Establishes times and places.
    - i. Meetings can be in person, by phone conference calls, or online.
      - The FLC arranges the initial “kick-off” Committee meeting that is held at the annual conference.
      - The FLC arranges conference calls and online meetings, if requested.
  - b. Conducts Committee meetings.
    - i. Prepares meeting agenda.
    - ii. Makes sure minutes of the meeting are taken.
  - c. Assists Sub Chairs’ activities.
  - d. Motivates and involves all Committee members.
- 2) Reports Committee activities.

- a. Keeps Committee members and Liaison apprised of Committee activity and progress.
  - b. Prepares reports about Committee progress for the Liaison and/or Committee Chair to present at the scheduled Board meetings.
- 3) If unable to attend the meetings Committee Chairs are invited to attend, coordinates with the Liaison and/or Co-Chair for Committee report presentation. Prepares a report for the Annual Conference business luncheon, summarizing all Committee activities for the year.
- 4) Attends Annual Conference and assists in the smooth flow of sessions.
- 5) Assists with the transition of responsibilities to the new Liaison and Chair.
- 6) Sends an electronic version of the Annual Conference program schedule and session descriptions to the Incoming Chair to utilize as a guide.
  - a. Uploads final documents to the Committee Shared Folder created by the Staff Liaison.
- 7) Solicits additional Committee Members, if necessary.
- 8) Informs Committee Members of key dates/deadlines.
- 9) Coordinates with FLC administrative staff on administrative matters, as needed.

B. Co-Chair

- 1) Assists Chair in coordinating Committee activities.
- 2) Assists Chair in updating the speaker guidelines and moderator training presentation documents.

C. Subcommittee Chairs

- 1) Coordinate the Subcommittee meetings.
  - a. Establish meeting times and places.
    - i. Meetings can be in person, by phone conference calls, or online.
      - The FLC arranges conference calls and online meetings, if requested.



- b. Conduct Subcommittee meetings.
  - c. Assist the Chair and other Sub Chairs.
  - d. Motivate and involve all Subcommittee members.
- 2) Report Subcommittee activities.
- a. Keep the Committee and Subcommittee members apprised of Subcommittee activity and progress.
  - b. Participate in periodic meetings between the Committee Chair and Sub Chairs.
  - c. Participate in periodic meetings of the Committee.
- 3) Attend Annual Conference and assist in the smooth flow of sessions.

D. Committee Members

(Can be Government, Associate, Retiree, or Student Members of the FGFOA)

- 1) Develop sessions for the Annual Conference.
- a. Select topics for each session. Sessions shall be balanced among the five (5) main tracks and the Pre-Annual Conference using a combination of 100-minute, 75-minute and 50-minute sessions. The main tracks include:
    - i. Accounting, Auditing, and Financial Reporting.
    - ii. Budget, Economics, and Financial Planning.
    - iii. Policy, Leadership, Strategic Planning, Personnel.
    - iv. Banking, Investment, Risk, Treasury Management, and Debt Management.
    - v. Technology
    - vi. Investment and Procurement/Leadership Pre-Annual Conference: four 100 - minute sessions each (totaling 800 minutes of Continuing Professional Education).
  - b. Create titles and short topic descriptions for inclusion in Annual Conference brochure.
  - c. Suggest speakers.
  - d. Obtain speakers' consents to present on specified topics.

- e. Obtain speakers' contact information.
  - f. Obtain speaker engagement form from speaker (provide to Sub Chair and FLC by way of Annual Conference speaker's confirmation link).
- 2) Attend meetings as called, including but not limited to:
- a. The organizational meeting held at the Annual Conference.
  - b. Subsequent Committee meetings called by the Committee Chair.
  - c. Subcommittee meetings called by the Subcommittee Chair.

## **V. Florida League of Cities' Responsibilities**

The FLC remains in contact with the Conference Program Chair and contacts the speakers as needed prior to the Annual Conference to request presentation materials, headshots and bios, if not included on the Annual Conference speaker's confirmation link.

## **VI. Terms**

Members are appointed for a one-year term and are encouraged to continue on the Committee for at least three years to provide the institutional knowledge and experience necessary for successful operation of the committee.

## **VII. Timeline**

- A. The Committee will hold an organizational meeting at the Annual Conference.
- B. The "Call for Session Topics" online submission portal will be sent for Newsletter items for inclusion in the July, August and September editions.
  - Data will be gathered and sent to the Committee Chair in the weeks following the initial launch.
- C. The Committee will convene a second meeting within one month of the Annual Conference.
- D. The Committee will develop a program schedule by day and time for Board approval in October.

- E. The Committee will complete session titles and descriptions by rank for Board approval in October.
- F. The Committee will provide the Board a list of speakers for each topic by the first meeting of the calendar year. The Committee will also verify the accuracy of topic title. Descriptions with speaker's planned presentation must be approved by the Board.
- G. The Committee will finalize the roster of recommended speakers for the sessions by February for inclusion into the Annual Conference Announcement.
- H. The Committee will host a moderator training in March, April and/or May depending on the Conference date outlining protocol and responsibilities of the moderator.
  - Two moderator trainings will take place:
    - "Evolution Series" Moderator Training
      - 2 months prior to the Conference
    - "Regular" Moderator Training
      - 1 month prior to the Conference

## **VIII. Budget**

- A. Committee expenses must be approved by the Board.
  - 1) The annual budget provides for expenses associated with committee meetings, such as meals and conference calls.
  - 2) Expenses associated with national speakers for the Annual Conference from Governmental Accounting Standards Board (the "GASB"), FICPA, and the Government Finance Officers Association (the "GFOA"), must be approved by the Board in advance.

## **IX. Minutes, Reports and Correspondence**

- A. Minutes – The Chair must keep minutes of each meeting and maintain copies for use by the next Chair and Committee.
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  - 1) All correspondence should be maintained in an electronic format and shared with the incoming Chair.

## **X. Special Tasks**

- A. FGFOA Website;
  - a. Each month, the Committee Chair and Co-Chair will look over the pages related to the Conference Program Committee and provide suggested updates for the page to the Board Liaison.
- B. Feedback forms:
  - a. Attendees will complete a feedback form, via the Annual Conference application (app) if available after each speaker or via the link sent in the FGFOA Conference Recap e-mail. This feedback is essential to the planning of the subsequent year's Annual Conference.
- C. FGFOA Newsletter:
  - a. The Committee Chair will provide the Liaison a timeline of items for inclusion in the newsletter.
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## **XI. General Considerations**

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  - 4) FGFOA Past Presidents;
  - 5) Annual Conference Program Sub Chairs and Committee members (regardless of membership type)
  - 6) Leadership FGFOA Graduates; and
  - 7) Membership at large (regardless of membership type).
- F. The Committee shall develop sessions utilizing multiple speakers and panel discussions when appropriate.
- G. The Committee should not schedule the Board for speaking engagements or moderating assignments for the session right after the Tuesday Business Luncheon.



# FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.

## 2025-2026 Educational Programs Committee

### Agenda Item

**2025-2026**

**CHAIRPERSON**

**Wayne Meyer**

Director of Operations  
Justice Administrative Commission  
227 N Bronough Street  
Tallahassee, FL 32301  
(805) 488-2415  
[wayne.meyer@justiceadmin.org](mailto:wayne.meyer@justiceadmin.org)

**BOARD LIAISON**

**Stephen Timberlake**

**COMMITTEE CO-CHAIR**

**Katie Roundtree**

**STAFF LIAISON**

**Karen Pastula**

**Meeting Date:** August 22, 2025

**Title of Item:** Educational & Webinar Committee Update

**Executive Summary, Explanation or Background:**

**Delivered Webinars (Since June Board Meeting)**

Three webinars have been delivered:

**1. Clean Energy Tax Credits**

- Date: June 26, 2025  
Registered: 488 | Attended: 219

**2. Transparency in Government and the PAFR**

- Date: July 17, 2025  
Registered: 485 | Attended: 240

**3. Just-in-time Training**

- Date: August 14, 2025  
Registered: TBD | Attended: TBD

**Upcoming Webinars**

The following sessions are scheduled for the remainder of 2025:

- Understanding Your Financial Statements – September 25, 2025
- Pension and OPEB Refresher – October 17, 2025
- Artificial Intelligence in Government Finance Update – December 18, 2025

These sessions reflect the committee's continued focus on delivering relevant, high-value content for FGFOA members.

**Committee Meeting & Planning for 2026**

The committee will hold its second meeting via Teams in August, after this report is distributed but prior to the Board meeting. The purpose of the meeting is to:

- Review any available feedback on past sessions
- Brainstorm and prioritize webinar topics for 2026
- Prepare a list of proposed topics to bring forward at the October Board meeting for discussion



**FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.**  
**2025-2026 Educational Programs Committee**  
**Agenda Item**

**Recommended Action:**

For informational purposes only, No action is being requested

*Wayne Meyer*

August 1, 2025

Wayne Meyer,  
Educational Programs Committee Chair

Date



**FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.**  
**2025-2026 Event Host Committee**  
**Agenda Item**

**2025-2026**  
**CHAIRPERSON**

**Tameka Blake**  
Budget Analyst  
City of Boca Raton  
(561) 393-7821  
[TBlake@myboca.us](mailto:TBlake@myboca.us)

**BOARD LIAISON**  
**Allison Tesla**

**COMMITTEE CO-CHAIR**  
**Carlisha Jenkins**

**STAFF LIAISON**  
**Jill Walker**

**Meeting Date: August 22, 2025**

**Title of Item: Promotional Strategies for the School of Governmental Finance Events**

**Executive Summary, Explanation or Background:**

Event Host Committee organizes events that greatly contribute to the growth and development of our FGFOA membership community. In our effort to maximize the impact of these events, we propose the following initiatives for the Board's consideration and approval.

**Promotional Posters:**

The committee is requesting the league to design the posters needed to effectively promote the School of Governmental Finance (SOGF) events. These posters will be strategically displayed in key locations and throughout the event area and shared on social media to raise awareness and increase attendance. Hospitality suite events:

- **Monday:** Monday Night Football: Wear your favorite sports team's shirt or jersey
- **Tuesday:** Games Night – Family Feud, Human Bingo
- **Wednesday:** Karaoke Night/Lip Sync Battle
- **Thursday:** Murder Mystery Night (It's a SOGF whodunnit!)

**SOGF Food and Prizes:**

The committee has requested light refreshments such as chicken wings, pizza, and other finger foods, as well as beverages, particularly beer and wine, for the attendees. Moreover, the committee seeks funding for the acquisition of gift cards to be distributed as part of raffles and prizes during the upcoming events.

**SOGF Budget Amendment:**

The Committee is requesting a budget amendment to the SOGF Budget in the amount of \$2,500 to cover the additional cost for raffles, food and other activities.





**FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.**  
**2025-2026 Event Host Committee**  
**Agenda Item**

**Recommended Action:**

Board approval for the league to design posters for SOGF events.

Approve a Budget Amendment of \$2,500 for the provision of entertainment equipment, refreshments, beverages, and the purchase of gift cards for participants and raffles at SOGF events.

*Tameka Blake*

August 8, 2025

**Tameka Blake,  
Event Host Committee Chair**

**Date**



# FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.

## 2025-2026 Local Chapters Committee

### Agenda Item

2025-2026

#### CHAIRPERSON

**Jamie Roberson, CGFO**

Chief Operating Officer of Finance  
Martin County Clerk of the Circuit  
Court & Comptroller  
100 SE Ocean Blvd.  
Stuart, FL 34994  
(772) 221-7414  
[jroberson@martinclerk.com](mailto:jroberson@martinclerk.com)

#### BOARD LIAISON

Kelly Strickland  
Nicole Gasparri

#### STAFF LIAISON

Jill Walker  
Karen Pastula

**Meeting Date: August 22, 2025**

**Title of Item: 2024-2025 Local Chapter Committee Progress Update**

#### **Executive Summary, Explanation or Background:**

The Local Chapters Committee held three meetings during the 2024-2025 year: one in person during the FGFOA Annual Conference on June 16, 2025, and two virtual meetings on June 27, 2025, and July 29, 2025. The committee was charged with addressing the following goals for the year:

- Development of an Annual Reporting Format for Local Chapters
- Review of Membership Participation Requirements
- Creation of a Committee Manual
- Review and Update of Chapter Bylaws
- Development of a Bylaws Checklist and Guidance Document

The committee's primary focus during these meetings was finalizing a standardized Annual Reporting Format to support consistency and transparency across all local chapters. The attached report reflects the outcome of that effort and is intended to serve as a template to streamline annual reporting requirements for local chapters.

In addition to finalizing the reporting format, the committee has continued discussions related to membership engagement and the need for clear and accessible guidance on bylaws and committee operations. Work on the remaining objectives is ongoing and will be the focus of future meetings.

We have also been working on developing the Local Chapter President's Orientation, which is scheduled for August 19, 2025, at 3:00 PM.

To support leadership continuity, Diane Martinez was appointed as Co-Chair. Her experience and commitment will be valuable as the committee completes its remaining deliverables.

#### **Recommended Action:**

Accept for informational purposes the attached Annual Reporting Format, the appointment of Diane Martinez as Co-Chair of the committee, and the update regarding the scheduled Local Chapter President's Orientation on August 19, 2025, at 3:00 PM.

**Jamie Roberson, CGFO**  
**Local Chapter Committee Chair**

08/07/25

**Date**

**TREASURE COAST CHAPTER  
FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION  
STATEMENT OF REVENUES, EXPENDITURES, AND CHANGES IN NET POSITION  
YEAR ENDED JUNE 30, 2025**

**Revenues:**

Membership dues	\$	-	
Event registrations		-	
Miscellaneous		-	
Total revenues		<u>          </u>	\$ -

**Expenditures:**

Meetings and events		-	
Equipment		-	
Operating supplies		-	
Scholarships		-	
Membership appreciation and promotional items		-	
Banking fees		-	
Miscellaneous		-	
Total expenses		<u>          </u>	<u>          </u> -

**Change in Net Position** -

**Net Position - Beginning of Year**           

**Net Position - End of Year** \$            -

**Reconciliation to Bank Balance**

Ending Bank Balance	\$	-	
Receivable(s)		-	
Payable(s)		-	
Adjusted bank balance		<u>          </u>	-
Ending Net Positon	\$	<u>          </u>	<u><u>          </u></u> -

Chapter President's Name and Address:

Jamie Roberson, CGFO  
100 SE Ocean Blvd  
Stuart, FL 34994



**FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.**  
**2025-2026 Local Chapters Committee**  
**Agenda Item**

**2025-2026**

**CHAIRPERSON**

**Jamie Roberson, CGFO**

Chief Operating Officer of Finance  
Martin County Clerk of the Circuit  
Court & Comptroller  
100 SE Ocean Blvd.  
Stuart, FL 34994  
(772) 221-7414  
[jroberson@martinclerk.com](mailto:jroberson@martinclerk.com)

**BOARD LIAISON**

Kelly Strickland  
Nicole Gasparri

**STAFF LIAISON**

Jill Walker  
Karen Pastula

**Meeting Date: August 22, 2025**

**Title of Item: Florida First Coast Local Chapter Bylaws  
Amendment – Review and Approval**

**Executive Summary, Explanation or Background:**

The Florida First Coast Local Chapter has submitted a proposed amendment to its Local Chapter Bylaws. A redlined version of the bylaw amendment is attached for your review. The purpose of the amendment is to update and clarify existing practices at the Local Chapter level, correct grammatical errors, and remove outdated references.

A summary of the proposed changes includes:

1. **Article VII, Section 4.a.** – Clarifies the process for filling Board vacancies specific to the Secretary and Treasurer positions.
2. **Article VII, Section 5.** – Provides additional clarity on the nomination process for Officers and Directors.
3. **Article VIII, Section 4.** – Updates the deadline for the Treasurer to submit the annual financial report from 15 days to 30 days after the close of the fiscal year.
4. **Article IX, Section 5.** – Clarifies that the Local Chapter is responsible for any financial matters not managed or provided by the FGFOA.
5. **Article X, Section 4.** – Renames the "Career Development Committee" to the "Professional Development Committee" to reflect current terminology.
6. **Article XII.** – Adds a new section authorizing the Local Chapter President to designate an attendee for FGFOA functions requiring chapter representation if they are unable to attend.

**Recommended Action:**

Approve the proposed Florida First Coast Local Chapter Bylaws amendment as presented in the attached redline document.

**Jamie Roberson, CGFO**  
**Local Chapter Committee Chair**

08/07/25

**Date**

**CHAPTER BY-LAWS  
FLORIDA GOVERNMENT  
FINANCE OFFICERS ASSOCIATION  
FLORIDA FIRST COAST CHAPTER**

**ARTICLE I – NAME**

This Chapter of the Florida Government Finance Officers Association (FGFOA) shall be known as the Florida First Coast Chapter.

**ARTICLE II – RULES AND REGULATIONS**

The Chapter shall, at all times, be subject to the provisions of the Constitution, the By-laws of the FGFOA and any local chapter requirements contained in the FGFOA Policies and Procedures.

**ARTICLE III – PURPOSE**

The purpose of this Chapter shall be to promote improvement of government financial administration in Northeast Florida by increasing the efficiency of government finance administrators, and to encourage training designed to enable members to remain current in applying modern operational techniques and updated standards.

**ARTICLE IV – CHAPTER MEMBERSHIP**

The Chapter membership shall consist of those eligible for membership in the FGFOA.

**ARTICLE V – MEETINGS**

**Section 1.** There shall be at least four (4) meetings of the Chapter each fiscal year. The fiscal year is defined as starting July 1<sup>st</sup> and ending June 30<sup>th</sup> for a full twelve month period.

**Section 2.** The last meeting of the fiscal year shall be considered the annual meeting for the election of officers and directors. This meeting shall take place no later than June 30.

**Section 3.** The Secretary shall, at least thirty (30) days prior to the annual meeting, provide notice to all members of the Chapter indicating the time and place of such meeting and the names of the individuals nominated to serve as officers and directors.

**Section 4.** A minimum of six (6) members or eight percent (8%) of the membership, whichever is greater, shall constitute a quorum for the transaction of business at any meeting. Members need to be present to vote.

**ARTICLE VI – VOTING RIGHTS**

**Section 1.** The voting rights of the Chapter shall be vested exclusively in active members, as defined by the Constitution and By-Laws of the FGFOA, and each shall have one vote in determining all questions to be decided by the membership.

**Section 2.** Associate members, as defined by the Constitution and By-Laws of the FGFOA, shall not hold office as officers or directors, although they may serve as members, and chair committees.

## **ARTICLE VII – BOARD OF DIRECTORS**

**Section 1.** The Board of Directors of the Chapter shall be active FGFOA members and shall serve, without compensation, as the governing body, and shall consist of the President, President-elect, Secretary and Treasurer who shall serve as the officers of the Chapter, plus three (3) Directors, who are the voting members of the Board.

**Section 2.** The term of office for the President, President-elect, and each Director shall be one (1) year. The term of the Secretary and Treasurer shall be two (2) years and shall be staggered.

**Section 3.** Officers and directors elected at the annual meeting of the Chapter may assume their respective positions immediately following the annual meeting and will serve until the election of their respective successors.

**Section 4.** The Board of Directors shall have the right and power to appoint a member to the unexpired term of any vacancy occurring on the Board of Directors of the chapter-as follows:

a.) The unexpired term of Officers of the Chapter President, President-elect, Secretary and Treasurer shall be filled as follows:

1.) The President unexpired term shall be filled by the President-elect. If the President-elect is not able to assume the President duties, then the Board of Directors shall have the right and power to appoint a member of the Board of Directors to the unexpired term. If no member of the Board of Directors is able to serve as President, then the Board of Directors shall have the right and power to appoint an active member, as defined by the Constitution and By-Laws of the FGFOA, of the Chapter to the unexpired term.

2.) The President-elect's unexpired term shall be filled either by the Secretary or the Treasurer in the order that each office holder has the shortest remaining term. If neither the Secretary nor the Treasurer is able to assume the President-elect duties, then the Board of Directors shall have the right and power to appoint an active member, as defined by the Constitution and By-Laws of the FGFOA and this, of the Chapter, to the unexpired term.

3.) Vacancies in either the Secretary or Treasurer offices shall be filled by the member of the Board of Directors. If no member of the Board of Directors is able to serve as Secretary or Treasurer, then the Board of Directors shall ~~having-have~~ the right and power to appoint an active member, as defined by the Constitution and By-Laws of the FGFOA and this, of the Chapter, to the unexpired term.

b.) The unexpired term of the Directors of the Board of Directors shall be filled as follows:

1.) The Director's unexpired term shall be filled by the Board of Directors having the right and power to appoint an active member, as defined by the Constitution and By-Laws of the FGFOA and this, ~~of the Chapter,~~ to the unexpired term.

**Section 5.** The Nominating Committee shall make nominations to be presented at or before the annual meeting for officers and directors. Nominations may also be made ~~from the floor,~~ by any active Chapter member.

**Section 6.** The Board of Directors shall have the power to fix the time and place for meetings of the Chapter. Notice of Chapter meetings shall be provided to all Chapter members.

**Section 7.** The Board of Directors may meet at such times and places as it may elect or as called by the President. Notice of Board meetings shall be provided to all Board members.

**Section 8.** For the transaction of any business by the Board of Directors, at least fifty percent (50%) of the voting members of said Board shall be present in person or present via a conference call to constitute a quorum, and the majority vote of the voting Board members present will decide all issues. No proxy may be voted at any meeting of said Board of Directors.

## **ARTICLE VIII – DUTIES OF OFFICERS AND DIRECTORS**

**Section 1.** President: The President shall be the chief elected officer of the Chapter and may call meetings of the Board of Directors whenever it is deemed necessary. The President shall preside at all meetings of the Chapter. The President shall enforce the Bylaws of the Chapter and the Constitution and Bylaws established by the FGFOA. The President shall keep the Board of Directors of the FGFOA fully informed of the affairs of the Chapter. The President shall also consult with the Association and the Board of Directors of the Chapter, whenever necessary, concerning the business of the Chapter and its activities.

**Section 2.** President-elect: In the absence or inability of the President to act, the President-elect shall exercise all powers and perform all of the duties of the President. The President-elect shall propose an operating budget for the subsequent year for approval by the Board of Directors. The President-elect shall perform any other duties as assigned by the President.

**Section 3.** Secretary: The Secretary shall keep all correspondence of the Chapter and minutes of all meetings of the Chapter and of the Board of Directors. An annual report prepared by the Treasurer covering fiscal matters and activities for the ~~previous~~ fiscal year will be submitted to the Secretary of the FGFOA by August 15<sup>th</sup> of the following fiscal year along with any other information requested by Secretary of the FGFOA. A quarterly and year to date report prepared by the Treasurer covering fiscal matters and activities for the first, second and third quarter of the fiscal year may be submitted to the Secretary of the FGFOA

**Section 4.** Treasurer: The Treasurer shall be responsible for preparing all necessary financial reports as may be required and prescribed by the FGFOA to maintain local chapter status. The Treasurer shall propose the annual financial report covering fiscal matters within ~~15-30~~ days of the end of the fiscal year. This report shall be submitted to the Chapters Secretary upon completion. The Treasurer shall receive, deposit and disburse funds as authorized by the Board of Directors.

**Section 5.** Director: Each director may assist in the decision making of the Board and, at the President's request, may serve as an individual liaison to one or more of the Chapter's standing committees.

## **ARTICLE IX – FISCAL MATTERS**

**Section 1.** The incoming Board of Directors may adopt a proposed budget covering the Chapter operations for the subsequent fiscal year.

**Section 2.** Dues and fees for Chapter members may be set at the discretion of the Chapter Board of Directors.

**Section 3.** The Board of Directors may establish a fee to cover the cost of any program sponsored by the organization, along with any corresponding meal charges.

**Section 4.** The Treasurer shall make an annual financial report to the Chapter membership at the first meeting of the new fiscal year for the prior fiscal year. The Treasurer may make a financial report to the membership each time there is a Chapter meeting. The Treasurer will make a financial report at the meetings of the Board of Directors if so requested by the President. The Treasurer shall make at least one financial report to the Board of Directors prior to the annual meeting for the election of officers and directors.

**Section 5.** The Chapter shall be ~~fully and solely~~ responsible for its own financial affairs when they are not managed or provided by the FGFOA.

## **ARTICLE X – COMMITTEES**

**Section 1.** The President, with the concurrence of other members of the Board of Directors, may establish such committees, and appoint members as necessary for the efficient operation of the Chapter. The following committees are recommended:

a) An Audit Committee, if established, of at least one member who is not an officer or director. The Audit Committee shall make its annual report to the Chapter membership at the first meeting of the new fiscal year for the prior fiscal year.

b) A Nominating Committee consisting of at least three members, one of whom is not a director. A member of the Board shall serve as the Chairman of this committee. The Nominating Committee shall provide the names of those being nominated for officers and directors of the Board of Directors to the Secretary at least thirty (30) days in advance of the annual meeting.



- c) A Membership Committee.
- d) A Program/Continuing Professional Education Committee.
- e) Other committees as deemed necessary by the President.

**Section 2.** The President may appoint Committee Chairs.

**Section 3.** Membership Committee.

- a) The Committee, if established, shall be responsible for promoting interest in the Chapter, conducting membership drives, and recommending candidates for membership.
- b) The committee shall keep records of pertinent information concerning each current and terminated member of the Chapter.

**Section 4.** Program/Continuing Professional Education Committee.

- a) The Committee, if established, shall be responsible for recommending and preparing the Chapter programs, obtaining speakers for the programs, and maintaining a library of program topics and speakers.
- b) The Committee shall coordinate the arrangements for Chapter meetings.
- c) The Committee will work with the ~~Career~~ Professional Development Committee of the FGFOA in developing continuing professional education seminars and promoting interest in such seminars offered by the Florida Government Finance Officers Association.

## **ARTICLE XI – AMENDMENTS TO THE BY-LAWS**

Amendments to the Chapter By-Laws shall be presented to the FGFOA Board of Directors for approval prior to the Chapter voting on such amendments and if approved by the FGFOA Board of Directors shall be given to the Chapter membership at least thirty (30) days prior to the Chapter meeting. An affirmative vote as specified in Article V, section 4, is required to adopt the proposed amendments.

## **ARTICLE XII – CHAPTER REPRESENTATIVE DESIGNATION**

If Chapter President is unable to attend FGFOA function that requires Chapter President presence, Chapter President may appoint his/her designee to attend the FGFOA function as Chapter representative in his/her place to ensure the Chapter officers, directors and membership receive timely updates on FGFOA initiatives.

## **ARTICLE XIII – AWARDS**

There shall be established an award ~~known~~ known as the “Friend of the Chapter.” This award shall ~~bestowed~~ be bestowed on a member or non-member of the Chapter who by act, deed, merit and such other criteria as established by the Board ~~of~~ of Directors has made a contribution to the Chapter that has enabled the Chapter in fulfilling its purpose as stated

in ARTICLE III – PURPOSE of the Chapter By-Laws. This award, if it is to be made, may be presented at the annual meeting of the Chapter. Each fiscal year prior to the annual meeting the Board will determine if there is a member or non-member eligible to receive the “Friend of the Chapter” award. This award may be presented to more than one recipient for that fiscal year.

**ARTICLE XI~~III~~<sup>IV</sup> – CERTIFIED GOVERNMENT FINANCE OFFICER (CGFO)**

The Florida First Coast Chapter of the Florida Government Finance Officers Association (FGFOA) does endorse and support the State Organization in encouraging all active members of the Chapter to strive to achieve the professional designation of [Certified Government Finance Officer](#) (CGFO) which is in keeping with ARTICLE III – PURPOSE of the Chapter By-Laws.

# Florida Government Finance Officers Association, Inc.

## 2025-2026 Professional Development Committee

### Agenda Item



2025-2026

**CHAIRPERSON**  
Kadem Ramirez

**BOARD LIAISON**  
Bill Spinelli

**STAFF LIAISON**  
Karen Pastula

**Meeting Date:** 8/15/25

**Title of Item:** Committee Update

#### **Executive Summary, Explanation or Background:**

The Florida Government Finance Officers Association (FGFOA) has completed the application period for its upcoming mentorship session, designed to develop and guide the next generation of finance professionals. Applications closed on August 8th, with a strong response from both experienced members and rising talent.

Currently, we have 18 mentors and 23 mentees ready to participate. The committee will begin the pairing process shortly, carefully matching individuals to ensure a successful and impactful experience for all involved.

The first official session of the **FGFOA Ignite! Mentoring Series** is scheduled for **August 20th**. This inaugural event will kick off the program, setting the stage for a productive and rewarding experience for our participants.

#### **Recommended Action:**

For review

Kadem Ramirez  
Name

8/8/2025  
Date



# Florida Government Finance Officers Association, Inc. 2025-2026 School of Governmental Finance Committee Agenda Item

**2025-2026**

**CHAIRPERSON**

Elizabeth Anne Walter, MBA,  
CGFO, CPFIM  
Budget & Grants Manager  
South Florida Regional  
Transportation Authority  
801 NW 33rd St  
Pompano Beach, FL 33064-  
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(954) 788-7882  
[waltere@sfrta.fl.gov](mailto:waltere@sfrta.fl.gov)

**BOARD LIAISON**

Sharon Almeida

**STAFF LIAISON**

Karen Pastula

**SUB-COMMITTEE MEMBERS**

Jennifer Desrosiers  
Tanya Quickel  
Christine Tenney  
Katherine Woodruff

**Meeting Date: August 22, 2025**

**Title of Item: 2025 SOGF Sessions & Speakers**

**Executive Summary, Explanation or Background:**

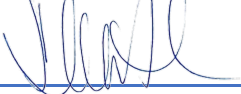
A preliminary list of topics and descriptions for the 2025 SOGF, along with confirmed speakers is presented for Board approval.

**Recommended Action:**

For your review and approval

Elizabeth Walter

**Committee Chair**



**Board Liaison**

August 1, 2025

**Date**

August 7, 2025

**Date**

DAY	START	END	Track	Session Title	Session Description	Speaker	Speaker Contact
Monday	8:00 AM	9:40 AM	Accounting & Financial Reporting	Single Audit Basics	This course will cover the basics of single audit, including common challenges encountered when creating a SEFA. We will also discuss what the auditors will be looking at for the single audit, and how all levels of the organization can prepare for the audit.	Tammy Campbell	McDirmit Davis Orlando, Fl.
Monday	8:00 AM	9:40 AM	Budget	From Vision to Execution: Designing a Successful Budget Process	To ensure that all stakeholders support the final budget and execute it effectively, the budget process must provide for sufficient collaboration and be perceived as fair. We will walk through a typical local government budget process and learn how to design a budget process, identify appropriate roles for key stakeholders, and organize work effort for the budget team. The class will cover all aspects of the budget process, including establishing a vision and priorities, engaging with the public, developing the annual budget, maintaining relationships, and monitoring the budget throughout the year.	Mark Mason, CPA	Mark Mason, CPA Assistant City Manager, City of Cape Coral mmason@capecoral.gov
Monday	10:00 AM	11:40 AM	Treasury & Debt	Update on Best Practices for Investments- How to Update or Establish An Investment Approach	Update on Investment Best Practices, Key Issues to Consider, and how to establish or update an Investment Approach	Jeffrey T. Larson, President Larson Consulting Services	101 University Blvd., #117 Orlando, Fl 32817 407-496-1597 jlarson@larsonconsults.com
Monday	10:00 AM	11:40 AM	Accounting & Financial Reporting	Aspects of Governmental Accounting	Governmental accounting encompasses various aspects that are crucial for the proper management and reporting of public funds. We will explore the essentials for maintaining the integrity and efficiency of public financial management and ensuring that public resources are used appropriately and in accordance with legal and regulatory requirements.	Bill Blend, CPA	ForvisMazars
Monday	1:00 PM	2:40 PM	Budget *	Aligning Capital, Budgets & Performance through AI and Integrated Strategies	As the public demands more transparency, efficiency and innovation, how to embrace AI and other strategies to drive synergy between capital planning, operating budgets, workforce and performance management.	Scott Coble	scoble@opengov.com

DAY	START	END	Track	Session Title	Session Description	Speaker	Speaker Contact
Monday	1:00 PM	2:40 PM	Treasury & Debt	A "Shallow" Dive into Municipal Bonds	1) An overview of the municipal bond market, 2) a discussion of different financing alternatives available to local governments in Florida, and 3) a “shallow” dive into municipal bonds, the players involved in the bond issuance process, and a look at refunding options available for outstanding bonds/debt.	Matthew Sansbury Public Resources Advisory Group (PRAG)	2002 N, Lois Avenue, Suite 120 Tampa, FL 33607  MSansbury@Pragadvisors.com Direct Number (Office/Mobile): (813) 970-2853
Monday	3:00 PM	4:40 PM	Accounting & Financial Reporting	Achieving Financial Transparency	Almost all governments post financial reports to their website to inform the public and promote transparency goals. However, do these reports actually provide information that is timely, accessible, and informative for the community? With modern technology, leading governments can create dashboards that offer genuine financial transparency.	Ken Burke & Daniel Coughenour	Pinellas County Clerk of the Circuit Court and Comptroller
Monday	3:00 PM	4:40 PM	Financial Management & Leadership	Character, Attitude and Contribution	Your character, attitude and contribution are the foundation for growth, opportunity, and progress. If you want to be successful, you must access your character, your attitude and the contribution or value you add to others. In this session we will explore these three anchors as a foundation for living.	Nicole Gaspari	Nicole Gasparri Clerk of the Circuit Court & Comptroller of Palm Beach County 561-355-3429 ngasparri@mypalmbeachclerk.com
Tuesday	8:00 AM	9:40 AM	Accounting & Financial Reporting	Introduction to Governmental Accounting	In Progress	Andrew Fierman & Enrique Llerena	Caballero, Fierman, Llerena, & Garcia, CFLG
Tuesday	8:00 AM	9:40 AM	Financial Management & Leadership *	Procurement Best Practices	Best practices for managing procurement process from solicitations to contract terms, risk assessments & vendor evaluations (suggested last SOGF but ended up with more than enough sessions)	Annie Perez	Annie Perez, CPPO Director/Chief Procurement Officer
Tuesday	10:00 AM	11:40 AM	Budget *	AI Meets Procurement: Smarter Budgets, Better Fiscal Accountability with Spending	Discover how Artificial Intelligence is transforming public sector procurement and budgeting. This session explores how AI enhances efficiency, forecasting, compliance, and cost control, while addressing challenges like data quality, ethics, and implementation. Learn practical applications and best practices that finance, and procurement professionals can apply immediately. Plus, meet “Procura” and friends, AI assistants that bring a touch of fun to smart government solutions.	Denise Finn, NIGP-CPP, CPPO, C.P.M., CBBP	Denise Finn Procurement Manager City of Ft. Myers 2200 Second Street Ft. Myers 239-321-7242 dfinn@cityftmyers.com

DAY	START	END	Track	Session Title	Session Description	Speaker	Speaker Contact
Tuesday	10:00 AM	11:40 AM	Financial Management & Leadership	True Colors	Did you ever wonder how a person’s automatic nature impacts their personality or even their ability interact with others? In this session we will explore how your nature or temperament dictate not only how you behave, who you get along with and even what irritates you. What if you could understand your temperament as access to understanding others and ultimately appreciating others.	Nicole Gaspari	Nicole Gasparri Clerk of the Circuit Court & Comptroller of Palm Beach County 561-355-3429 ngasparri@mypalmbeachclerk.com
Tuesday	1:00 PM	2:40 PM	Accounting & Financial Reporting	FGFOA Resources	Join us for an informative and engaging session designed to help finance professionals leverage the numerous resources available through FGFOA. You’ll gain valuable insights into how to utilize FGFOA's offerings to enhance your career and streamline your work processes. This session will cover four key areas: networking, education, information, and leadership. Don't miss this chance to discover how FGFOA can support and advance your professional journey.	TBD	
Tuesday	1:00 PM	2:40 PM	Budget	Budgeting 101	This session delivers a foundational overview of governmental budgeting. Attendees will learn the components of the budget cycle, including revenue projections and expenditure planning. We'll explore how the budget supports transparency, accountability and strategic service delivery as well as aligning scarce resources with governing board priorities.	Sarah Simpson, Allison Teslia, Sharon McGuire,	Sarah Simpson, Allison Teslia, Director, Office of Management and Budget for Lake County, FL & Sharon McGuire, CPA, CGFO, Management & Budget Director, City of Boca Raton
Tuesday	3:00 PM	4:40 PM	Accounting & Financial Reporting	Planning & Data Analysis	In Progress	Jeffrey Bakus	Citrin Cooperman
Tuesday	3:00 PM	4:40 PM	Treasury & Debt	Fraud and Cybersecurity	Fraud is on the rise and keeping abreast of all the latest schemes and potential mitigants can be daunting. We welcome Bank of America Cybersecurity Expert, Benjamin Tweel, as he discusses the current threat landscape and provides tips on how to combat everything from check fraud to cybercrime. He will also discuss tips and tricks to help maintain your personal cyber hygiene.	Benjamin Tweel CISSP Senior Vice President Global Information Security	Benjamin.Tweel@bofa.com 312.521.4441 Bank of America Plaza 540 W Madison St  Chicago, IL 60661

DAY	START	END	Track	Session Title	Session Description	Speaker	Speaker Contact
Wednesday	8:00 AM	9:40 AM	Financial Management & Leadership	Financial Sustainability and Affordability: Strategies for Dealing with the Challenges Ahead	Financial sustainability and affordability are key challenges for local governments across the country. As municipalities strive to provide high-quality services while balancing tight budgets, proactive planning becomes essential for creating a more sustainable and resilient future. This session will discuss approaches for navigating economic uncertainty, building appropriate infrastructure, mitigating risks from natural disasters and human-caused events, pricing services fairly, minimizing economic burdens on vulnerable populations, and fostering public trust. The exploration of the question – "What is affordable?" – aims to unpack the complexities surrounding pricing and accessibility.	Bryan Mantz	Bryan Mantz, President, GovRates 1988 Varick Way, Casselberry, FL 32707-2409 8334687526
Wednesday	8:00 AM	9:40 AM	Budget	TRIM Overview	In Progress	TBD	
Wednesday	10:00 AM	11:40 AM	Accounting & Financial Reporting*	Cybersecurity	In Progress	Randy Romes	CliftonLarsonAllen
Wednesday	10:00 AM	11:40 AM	Treasury & Debt	Economic Update	Review economic and interest rate trends and the impact of these trends on the economy.	John Grady III, CTP, Managing Director, Rod Bettini, Sr. Director, Investment Services	Public Trust Advisors (407) 514-2727
Wednesday	1:00 PM	2:40 PM	Accounting & Financial Reporting *	OPEB	In Progress		GRS Consulting
Wednesday	1:00 PM	2:40 PM	Financial Management & Leadership	Leading the Difficult Employee	There is always one in the crowd, that toxic employee with the unwanted behavior. This session will explore in a "No-Nonsense" way, several strategies on how to deal with these employees.	Lisa G. Gilbert, CEO, CPBA, CPDFA, CPEQA, CPDNA, CAMS-II	Lisa G. Gilbert, CEO, CPBA, CPDFA, CPEQA, CPDNA, CAMS-II No-Nonsense Training Solutions, Inc. 954.364.8871 coachlisa@nonontraining.com



DAY	START	END	Track	Session Title	Session Description	Speaker	Speaker Contact
Wednesday	3:00 PM	4:40 PM	Accounting & Financial Reporting *	GASB Update	"This session will include a quick recap of recently issued pronouncements, the latest news from the Governmental Accounting Standards Board (GASB) about current pronouncements and implementation guides, as well as a look at the current projects the GASB is working on	Daniel Anderson, CPA	Mauldin Jenkins CPAs
Wednesday	3:00 PM	4:40 PM	Treasury & Debt	Conduit Financing	Conduit financings are a means for economically raising capital via tax-exempt municipal bonds to fund large-scale projects that benefit the general public. These are infrastructure projects too large or complex for traditional financing methods. The concept can be utilized by private companies, non-profit organizations, and public entities. The government issues bonds on behalf of the borrower, acting as a “conduit” for the funds and passing them through to the borrower. Projects funded can include hospitals, airports, industrial and housing projects, public facilities, and schools. The bonds are used to fund loans to for-profit and nonprofit developers for the acquisition and rehabilitation or new construction of affordable rental developments. The interest paid is typically tax-exempt.	Steve Eaddy, Lourdes Reyes Abadin, Cristina Zeinali-Ghalah, Kimberly Mitchell	Estrada Hinojosa 55 Merrick Way, Suite 216 Coral Gables, FL 33134 (305) 507-0100 Office (305) 675-3708 Fax abadin@ehmuni.com czeinali@ehmuni.com seaddy@ehmuni.com
Thursday	8:00 AM	9:40 AM	Budget *	The Pursuit of Efficiency in the Era of DOGE	The presentation will cover improving efficiencies through interlocal service boundary and joint planning agreements between the County and its municipalities, privatizing/outsourcing of government services, centralization of overhead services, and the emergence of AI tools to improve efficiency.	Bradley Arnold	County Administrator/Budget Office Board of Sumter County Commissioners. 352-689-4400 bradley.arnold@sumtercountyfl.gov
Thursday	8:00 AM	9:40 AM	Treasury & Debt	Structure of the Treasury Market	Understanding the creation, function, and dynamics of U.S. Treasuries reveals their pivotal role in stabilizing the U.S. economy and shaping global financial markets.	Rene O'Day Director Client Relationship & John Scott, CTP	Deep Blue Investment Advisors (813)-321-3249 P. O. Box 9691 Tampa, FL 33674

DAY	START	END	Track	Session Title	Session Description	Speaker	Speaker Contact
Thursday	10:00 AM	11:40 AM	Treaasury & Debt	What Every Issuer Needs to Know About Arbitrage Rebate	Within a local government investment program, it is important to recognize the tax implications associated with the investment of tax-exempt bond proceeds. This session will cover basic arbitrage rebate and yield restriction compliance concepts and apply them to investment strategies for project, debt service, and other bond proceeds accounts in order to maximize your retainable investment income and implement strategies to enhance your investment program.	Richard Pengelly, CFA, CIMA, CTP Datanilza Metz	PFM Asset Management LLC 407.340.4905 407.406.3766- Mobile pengelly@pfmam.com Metz@pfmam.com
Thursday	10:00 AM	11:40 AM	Financial Management & Leadership *	Fostering Multi-Generational Teams	The issue of managing a multi-generational team has never been more pressing. This session will provide you with a powerful and adaptable toolkit designed with everything you need to maximize the full potential of a diverse workforce.	Tracey MacNeney Erika Hlywiak	Clerk of the Circuit Court & Comptroller, PBC Finance Manager - Tracey MacNeney Finance Supervisor - Erika Hlywiak
Thursday	1:00 PM	2:40 PM	Budget	Special Assessments	In the midst of tightening budgets, uncertainty and rising service demands, local governments are under pressure to diversify revenue streams without overburdening taxpayers. Special assessments are targeted funding mechanisms that can directly support infrastructure, public safety, beautification and other community improvement.	Peter Napoli	Peter Napoli, Senior Manager, Stantec MTC Financial Management, 904-671-0117, peter.napoli@stantec.com
Thursday	1:00 PM	2:40 PM	Financial Management & Leadership *			Elvis Epps, Ed.D.	
Thursday	3:00 PM	4:40 PM	Accounting & Financial Reporting	Internal Controls	Gain an overview of internal control and related key aspects so that you recognize auditor and management roles and responsibilities related to internal control and procedures involved in understanding an entity's internal control in a risk assessment.	Tim Gruters	Carr, Riggs & Ingrams CPAs and Advisors
Thursday	3:00 PM	4:40 PM	Financial Management & Leadership *	Preparing for an Effective ERP Implementation	Implementing a new ERP System may be one of the biggest projects in your career in government finance. Making the investment of time and resources up front could be the difference between success and failure. What steps should you take to best position your organization for success? Let's talk about it!	Nichole Wood Christine Tenney  Tracy Schatzman - Lee County Clerk (tentative)	Nichole Wood - Pinellas County Clerk Christine Tenney - City of Fort Myers  Tracy Schatzman - Lee County Clerk (tentative)

DAY	START	END	Track	Session Title	Session Description	Speaker	Speaker Contact
Friday	8:00 AM	9:40 AM	Financial Management & Leadership	Strategic Planning	From basic to elaborate and everything in between, this session will unpack strategic planning from beginning to end. Examples of various strategic plans will be reviewed and current trends such as key success measurements and how to link your strategic plans to priority-based budgeting to ensure proper financial management will be explored.	Doug Thomas	Doug Thomas, SGR PO Box 1642 Keller, TX 76244 863-860-9314 douglasthomas@governmentresource.com
Friday	10:00 AM	11:40 AM	Accounting & Financial Reporting *	Financial Reporting, the ACFR and PAFR	In Progress	Kevin C Karnes, Chris Kessler, CPA	Kevin C Karnes, Clerk of the Circuit Court & Comptroller - Lee County Chris Kessler, CPA - Clifton Larson Allen CPAs



# FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC. 2025-2026 Technical and Legislative Resources Committee Agenda Item

2025-2026

**CHAIRPERSON**

Ajay Gajjar, CPA, CMA, CTP, CFM,  
CIA, CGFO

Finance Director

Hillsborough County Clerk  
of Court & Comptroller  
PO Box 1110

Tampa, FL 33601-1110

(813) 307-7026

[gajjar@hillsclerk.com](mailto:gajjar@hillsclerk.com)

**BOARD LIAISON**

Nicole Jovanovski

**COMMITTEE CO-CHAIR**

Derek Noonan

**STAFF LIAISON**

Jill Walker

**Meeting Date: August 22, 2025**

**Title of Item: Executive Summary of Committee Meeting  
Held on July 29, 2025**

**Executive Summary, Explanation or Background:**

- A. Co-Chair Derek Noonan and Legislative Liaison, Ted Sauerbeck prepared the attached **2025 Legislative Summary of Local Government Finance (Passed Bills Only)** with some assistance from volunteers. This is ready for distribution to FGFOA members, either by email or in the newsletter. A summarized Assessment of Failed Bills is scheduled to follow.
- B. FL DOGE: Ted Sauerbeck will find out if the Florida League of Cities legal counsel has answers to questions he posed.
- C. One Big Beautiful Bill: Allison Feurtado will attend the GFOA Seminar scheduled for August 21<sup>st</sup> on this topic and provide notes to the TLRC.
- D. ListServe Subcommittee: Becky Schnirman is the Chair of this subcommittee with an emphasis on technology (to identify/evaluation potential replacement for the current ListServe provider). Volunteers are ready.

**Question for the Board:**

The FY 26 budget has \$4,500 designated for the ListServe. Is it possible to have more budgeted for a better license or software?

- E. Government Resources Manual Subcommittee. Gabriela Molina is the Chair of this subcommittee and volunteers are ready.
- F. Virtual GASB Forum: The following volunteered to attend the Virtual meeting on August 11<sup>th</sup>: CJ Scott, Allison Feurtado, CJ Scott, Ted Sauerbeck and possibly Lory Irwin.



**FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.  
2025-2026 Technical and Legislative Resources Committee  
Agenda Item**

G. GASB Responses: We will respond when the GASB documents are released. The next one is the Exposure Draft on Revenue and Expense Recognition, expected in the first quarter of 2026.

H. The GASB Survey on OPEB was distributed to TLRC members to complete if it applies to them and they choose to respond.

For more information on topics shown above, see Meeting Notes in the TLRC's SharePoint folder.

**Recommended Action:**

Answers to question shown above would be appreciated.

*Ajay Gajjar*

August 8, 2025

**Ajay Gajjar,**  
**Technical and Legislative Resources Committee Chair**

**Date**

# **2025 Legislative Summary Local Government Finance (Passed Bills Only)**



**Florida Government Finance Officers  
Association**

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## **I. PASSED BILLS**

### **i. Ad Valorem Taxation**

CS/HJR 1215 (Joint Resolution by State Affairs Committee; Alvarez, D. Barnaby; Chamberlin; Fabricio; López, J.; Maggard; Owen; Salzman; Yarkosky) Proposes amendment to State Constitution to exempt certain tangible personal property from ad valorem taxation.

Effective date: If approved, the amendment would apply for tax years beginning January 1, 2027.

### **ii. Agricultural Worker Housing, Mosquito Control, Fluoride**

Ch. 2025-22, L.O.F., (SB 700 (Truenow)) amends several statutes related to the migrant housing. Specifically:

- A governmental entity may not adopt or enforce any legislation, regulation, or ordinance to inhibit the construction or installation of housing for legally verified agricultural workers on land classified as agricultural land pursuant to s. 193.461 which is operated as a bona fide farm except as provided in this subsection Amends s. 27.703, F.S., to require appointed capital collateral regional counsel or other appointed attorney to be paid from funds appropriated to the Justice Administrative Commission.
- The bill specifies setbacks and fencing requirements.
- The bill allows municipalities to conduct mosquito control functions (formerly, such functions were limited to counties and special districts).
- Prohibits the use of any additive in a public water system which does not meet the definition of a water quality additive as defined in s. 403.852(19); i.e., prohibits fluoride.

Effective date: July 1, 2025.

### **iii. Building Projects**

Ch. 2025-40 L.O.F., (HB 683 (Griffitts; Benarroch; Salzman)) The bill:

- Prohibits local governments from prohibiting homeowners from installing synthetic turf.
- Prompt processing of change orders: For any contract for construction services entered into on or after July 1, 2025, if a local government receives from its contractor a price quote for a change order requested or issued by the local government for construction services, and the price quote conforms to all statutory requirements and contractual requirements for the project:
  - o The local government must approve or deny the price quote and send written notice of that decision to the contractor within 35 days after receipt of such quote.
  - o A denial notice must specify the alleged deficiencies in the price quote and the actions necessary to remedy those deficiencies. If the local governmental entity fails to provide the contractor with a notice in



compliance with this section, the change order and price quote are deemed approved, and the local governmental entity must pay the contractor the amount stated in the price quote upon the completion of the change order.

- A contract between a local government and a contractor may not alter the local governmental entity's duties under this section.
- When scoring or evaluating bids for a public works project, a local government cannot penalize a bidder for performing a larger volume of construction work for the State or political subdivision or reward a bidder for performing a smaller volume of construction work for the state or political subdivision.

Effective date: July 1, 2025.

#### **iv. Building Regulations**

Ch. 2025-172, L.O.F., (SB 1730 (Calatayud)) limits building moratoriums to no more than 90 days in a three-year period. Places limits on local government building permitting provisions. Requires local governments to pay plaintiff legal costs if the plaintiff is successful regarding civil challenges to certain development restrictions.

Effective date: July 1, 2025.

#### **v. Building Regulations**

Ch. 2025-177, L.O.F., (SB 1080 (McClain)) makes several changes that impact development permits. Changes impacting local governments include:

- Requiring counties and municipalities to specify in writing all requirements for zoning, rezoning, or zoning variances.
- Requiring counties and municipalities to acknowledge receipt of a development permit or order.
- For applications that do not require final action through a quasi-judicial or public hearing, the county must approve, conditionally approve, or deny the application within 120 days (180 days for public hearing or quasi-judicial hearing).
- Requiring counties and municipalities to issue refunds of amounts ranging from 10 percent to 100 percent of the application fee if the county fails to issue a written notification of completeness or written specification of areas of deficiency within certain time frames.
- Requiring impact fee increases to be implemented in at least 2, but not more than 4, equal annual increments. A local government may not increase an impact fee rate beyond the phase-in limitations under this paragraph if the local government has not increased the impact fee within the past 5 years. Any year in which the local government is prohibited from increasing an impact fee because the jurisdiction is in a hurricane disaster area is not included in the 5-year period.
- Comprehensive plan amendments must be adopted within 180 days of the second public hearing or are considered to be administratively withdrawn.

Effective date: October 1, 2025, except as otherwise expressly provided in the bill.

**vi. Emergencies**

Ch. 2025-190 L.O.F., (SB 180 ( DiCeglie)) implements several disaster provisions, as follows:

- A local government, school district, or special district may not assess an impact fee for the reconstruction or replacement of a previously existing structure if the replacement structure is of the same land use as the original structure and does not increase the impact on public facilities beyond that of the original structure. However, if the replacement structure increases the demand on public facilities due to a significant increase in size, intensity, or capacity of use, a local government, school district, or special district may assess an impact fee in an amount proportional to the difference in the demand between the replacement structure and the original structure. Any such fee must be reasonably connected to, or have a rational nexus with, the need for additional capital facilities and the increased impact generated by the reconstruction or replacement of a previously existing structure.
- Each political subdivision shall notify the Florida Division of Emergency Management, on or before May 1 each year, of the person designated as the emergency contact for the political subdivision and his or her alternate and of any changes in persons so designated thereafter. For a county, the emergency contact must be the county emergency management director.
- Each county and municipality must post on its publicly accessible website:
  - o A frequently asked questions web page related to natural emergency response, emergency preparedness, and public relief for residents following an emergency. The web page must answer questions concerning resident evacuations; safety tips; generator, food and drinking water, and wastewater and storm water safety; damage assessment; debris cleanup; accessing assistance through the Federal Emergency Management Agency and this state; building recovery; natural emergency guidance; applicable laws; and what to do before, during, and after an emergency.
  - o A disaster supply list and a list of emergency shelters.
  - o Links to information about flood zones.
  - o A checklist for residents explaining next steps to take during post disaster recovery.
  - o Information specific to persons with disabilities, including, but not limited to, guidelines for special needs shelter registration; an explanation of how to register for special needs shelters and where to obtain assistance with that process; guidelines as to the level of care that is or is not provided at a special needs shelter as well as situations when either a general population shelter or hospital should be considered; and any other post disaster assistance or resources available to affected persons with disabilities impacted by a disaster.
- Each county and municipality shall develop a post storm permitting plan to expedite recovery and rebuilding by providing for special building permit and inspection procedures after a hurricane or tropical storm. The plan must, at a minimum:

- Ensure sufficient personnel are prepared and available to expeditiously manage post disaster building inspection, permitting, and enforcement tasks. The plan must anticipate conditions that would necessitate supplemental personnel for such tasks and address methods for fulfilling such personnel needs, including through mutual aid agreements as authorized in s. 252.40, other arrangements, such as those with private sector contractors, or supplemental state or federal funding. The plan must include training requirements and protocols for supplemental personnel to ensure compliance with local floodplain management requirements that apply within the county or municipality.
  - Account for multiple or alternate locations where building permit services may be offered in person to the public following a hurricane or tropical storm during regular business hours.
  - Specify a protocol to expedite permitting procedures and, if practicable, for the waiver or reduction of applicable fees in accordance with and in addition to the procedures and waivers provided for under s. 553.7922. The plan must identify the types of permits that are frequently requested following a hurricane or tropical storm and methods to expedite the processing of such permits.
  - Specify procedures and resources necessary to promote expeditious debris removal following a hurricane or tropical storm.
- Each county and municipality shall update the plan no later than May 1 annually.
- By May1 annually, each county and municipality shall publish on its website a hurricane and tropical storm recovery permitting guide for residential and commercial property owners. The guide must describe:
  - The types of post storm repairs that require a permit and applicable fees.
  - The types of post storm repairs that do not require a permit.
  - The post storm permit application process and specific modifications the county or municipality commonly makes to expedite the process, including the physical locations where permitting services will be offered.
  - Local requirements for rebuilding specific to the county or municipality, including elevation requirements following substantial damage and substantial improvement pursuant to the National Flood Insurance Program (NFIP) and any local amendments to the building code.
- As soon as practicable following a hurricane or tropical storm, a county or municipality within the area for which a state of emergency pursuant to s. 252.36 for such hurricane or tropical storm is declared shall publish updates on its website to the information required under s.252.381(3)(a) which are specific to such storm, including any permitting fee waivers or reductions.
- For 180 days after a state of emergency is declared pursuant to s. 252.36 for a hurricane or tropical storm, a county or municipality within the area for which the state of emergency is declared may not increase building permit or inspection fees.

- On or before May 1, 2026, each county and municipality must provide an online option for receiving, reviewing, and accessing substantial damage and substantial improvement letters. The county or municipality must allow homeowners to provide an e-mail address where they can receive digital copies of such letters.
- As soon as reasonably practicable following the landfall and passage of a hurricane or tropical storm, each county and municipality that has experienced a direct impact from a natural emergency must use its best efforts to open a permitting office at which residents can access government services for at least 40 hours per week.
- Section 252.422, F.S., is created to prohibit, for 1 year after a hurricane makes landfall, an impacted local government from proposing or adopting:
  - o A moratorium on construction, reconstruction, or redevelopment of any property.
  - o A more restrictive or burdensome amendment to its comprehensive plan or land development regulations.
  - o A more restrictive or burdensome procedure concerning review, approval, or issuance of a site plan, development permit, or development order, to the extent that those terms are defined in s. 163.3164.
- Any person may file suit against any impacted local government for declaratory and injunctive relief to enforce this section.
- The Office of Program Policy Analysis and Government Accountability (OPPAGA) shall conduct a study on actions taken by local governments after hurricanes which are related to comprehensive plans, land development regulations, and procedures for review, approval, or issuance of site plans, permits, or development orders. The study must focus on the impact that local governmental actions, including moratoriums, ordinances, and procedures, have had or may have on construction, reconstruction, or redevelopment of any property damaged by hurricanes. In its research, OPPAGA shall survey stakeholders that play integral parts in the rebuilding and recovery process. OPPAGA shall make recommendations for legislative options to remove impediments to the construction, reconstruction, or redevelopment of any property damaged by a hurricane and prevent the implementation by local governments of burdensome or restrictive procedures and processes. OPPAGA shall submit the report to the President of the Senate and the Speaker of the House of Representatives by December 1, 2025.
- Each state or local government contract for goods or services related to emergency response for a natural emergency entered into, renewed, or amended on or after July 1, 2025, must include a provision that requires a vendor or service provider that breaches such contract during an emergency recovery period to pay a \$5,000 penalty and damages, which may be either actual and consequential damages or liquidated damages. As used in this section, the term “emergency recovery period” means a 1-year period that begins on the date that the Governor initially declared a state of emergency for a natural emergency

- Each county and municipality shall apply to the Department of Environmental (DEP) Protection for authorization of at least one debris management site and shall annually seek preauthorization for any previously approved debris management sites, as allowed by the DEP. A municipality may jointly apply for authorization of a debris management site with a county or at least one adjacent municipality, if the parties develop and approve a memorandum of understanding. Such memorandum must clearly outline the capacity of the debris management site and location of the site relative to each party. The memorandum of understanding must be approved annually as part of the preauthorization process
- Each county listed in the Federal Disaster Declaration for Hurricane Debby (DR-4806), Hurricane Helene (DR-4828), or Hurricane Milton (DR-4834), and each municipality within one of those counties, may not propose or adopt any moratorium on construction, reconstruction, or redevelopment of any property damaged by such hurricanes; propose or adopt more restrictive or burdensome amendments to its comprehensive plan or land development regulations; or propose or adopt more restrictive or burdensome procedures concerning review, approval, or issuance of a site plan, development permit, or development order, to the extent that those terms are defined by s. 163.3164, F.S., before October 1, 2027, and any such moratorium or restrictive or burdensome comprehensive plan amendment, land development regulation, or procedure shall be null and void ab initio. This subsection applies retroactively to August 1, 2024

Effective date: June 26, 2025.

**vii. Implementing the 2025-26 General Appropriations Act**

Ch. 2025-199, L.O.F. (SB 2502) **Section 124** authorizes the Office of Policy and Budget OPB) within the EOG to conduct a review of the functions, procedures, expenditures, and policies of a local government and to submit a report to the Governor, Chief Financial Officer, President of the Senate, and Speaker of the House of Representatives by January 13, 2026. Specifically:

- The Office of Policy and Budget within the Executive Office of the Governor may conduct a review of the functions, procedures, and policies of local governmental entities, local governing authorities, or units of local general-purpose government for fiscal years ending on September 30, 2024, and September 30, 2025. The review aims to identify:
  - o Use of resources supporting diversity, equity, and inclusion initiatives inconsistent with law.
  - o Evidence of gross overspending, waste, fraud, abuse, or mismanagement of resources.
  - o Duplicative or redundant government functions.
- The review may include personnel costs, administrative overhead costs, contracts, programs, grants, outsourcing, financial documents, and personnel standards.
- Access Requirements for Local Governments:

- Local governments that received state funding must provide access to personnel, premises, data systems, and records within 7 business days of a request from the Office of Policy and Budget.
- Failure to comply may result in a fine of \$1,000 per day, assessed against the local government and deposited into the General Revenue Fund.
- Reporting:
  - The Office of Policy and Budget must compile and submit an initial report by January 13, 2026, to the Governor, Chief Financial Officer, President of the Senate, and Speaker of the House of Representatives. The report must include:
    - Identification of reviewed local governments.
    - Summary of reviews.
    - Instances of misuse of resources for diversity, equity, and inclusion initiatives.
    - Evidence of gross overspending, waste, fraud, abuse, or mismanagement.
    - Recommendations for improving fiscal responsibility and streamlining government services.

Effective date: July 1, 2025; expires July 1, 2026.

**viii. Law Enforcement and Other Personnel**

Chapter 2025-176, L.O.F., (CS/CS/CS/HB 1371 (Nix; Alvarez, D.; Abbott; Alvarez, J.; Anderson; Booth; Fabricio; Owen; Rizo)). Creates s. 943.0413, F.S., which provides for the creation of a Critical Infrastructure Mapping Grant Program and provides that any law enforcement agency, county, municipality, or other political subdivision of this state, or any agent thereof, which has constitutional or statutory authority to employ or appoint law enforcement officers is eligible to receive funding from the grant program.

Effective date: July 1, 2025

**ix. Sewer Collection Systems**

Chapter 2025-117, L.O.F., (HB 1123 (Cassel; Woodson; Conerly; López, J.)). Creates s. 180.03(4), F.S., which provides that a municipality is authorized to utilize revenue generated by the municipality from operation of the municipality's central sewage system for expansion of the central sewage system.

Effective date: July 1, 2025

**x. Taxation**

Ch. No. 2025-208, L.O.F., (HB 7031 (Black; Chaney)) is a comprehensive tax reform bill addressing various Florida statutes relating to tax and revenue. The following provisions are of note to municipalities:

- Affordable Housing Property Tax Exemption (owned by Not-for-Profits): Clarifies that owners of multifamily properties who currently receive a property tax exemption may continue to receive the exemption through an application process by either the current or successive owners of the property. Land that is assigned or subleased from a nonprofit entity to an extremely-low-income, very-low-income, low-income, or moderate-income person or persons as defined in s. 420.0004, F.S., for such person's or persons' own use as affordable housing is exempt from ad valorem taxation.
- Affordable Housing Property Tax Exemption (owned by the State): For properties owned by the state, if portions of said properties are used to provide 70 units of affordable housing to low-income families as defined in s. 420.0004, F.S., and the property is subject to restrictive uses by deed, then the property may be exempt from property taxes.
- Gold Seal Quality Certified Child Care Facilities: Provides that any portion of real property used by a childcare facility that has achieved Gold Seal Quality status under s. 1002.945, F.S., may qualify for an exemption from property taxes.
- Communication Services Tax (Local): The local rates are frozen until 2031 and each municipality must prioritize the use of these funds to ensure the timely review and processing of right-of-way permits for communications service providers pursuant to federal and state law.
- Business Rent Tax: This tax is eliminated by repeal of its governing law, s. 212.031, F.S., effective October 1, 2025.
- Creation of the Rural Community Investment Program: For entities that have invested \$100 million or more in Rural Areas of Opportunity as defined by s. 288.0656, F.S., may receive a tax credit capped at \$7 million if specific parameters are met, including but not limited to, job creation, or retention.
- Extends the current freeze on rate increases for local communications services tax (CST) from January 1, 2026, to January 1, 2031.
- Requires local governments to prioritize the use of local CST revenue for the timely review, processing, and approval of permit applications for the use of rights-of-way by providers.
- Allows fiscally constrained counties adjacent to the Gulf of America or the Atlantic Ocean to use tourist development tax (TDT) revenues for public facilities.
- Allows all counties adjacent to the Gulf of America or the Atlantic Ocean to use TDT revenues for beach lifeguards.
- Allows counties and school boards to reduce or repeal certain local discretionary sales surtaxes in effect by a two-thirds vote.
- Extends the timeframe for local incentive program benefits in enterprise zones to continue from December 31, 2025, to December 31, 2035, for multi-phase projects that vested on or before December 31, 2021.

**Effective date:** July 1, 2025, except as otherwise expressly provided in the bill.

**xi. Unlawful Demolition of Historical Buildings and Structures**

Chapter 2025-87, L.O.F., (SB 582 (Leek)) authorizes a code enforcement board or special magistrate to impose a fine that exceeds certain limits for the unlawful demolition of certain historical buildings or structures under certain circumstances; providing that such fine may not exceed 20 percent of the fair or just market value of the property for the demolition of the building or structure.

Effective date: July 1, 2025

**xii. Utility Relocation**

Ch. 2025-122, L.O.F., (CS/HB 703 (Robinson W. and Barnaby)) requires that a specified amount of communications services tax remittances be distributed by the Department of Revenue by a nonoperating transfer to the Department of Commerce in monthly installments to the Grants and Donations Trust Fund within the Department of Commerce for the Utility Relocation Reimbursement Grant Program; revising the percentage by which a certain amount transferred into the Local Government Half-cent Sales Tax Clearing Trust Fund must be reduced, beginning on a certain date; authorizing a service provider to apply to the Utility Relocation Reimbursement Grant Program for reimbursement of relocation expenses; creating the Utility Relocation Reimbursement Grant Program within the Department of Commerce; providing the purpose of the program; requiring the Department of Revenue to deposit certain proceeds into a specified trust fund to fund the program beginning on a certain date; providing an appropriation, etc. APPROPRIATION: \$50,000,000

- If a county or municipal authority requires a provider of communications services (subject to Chapter 202) to relocate a facility used to provide such communications services, the service provider must initiate any necessary work upon notice from the authority.
- The county or municipal authority is not responsible for paying the expense of such work, except as otherwise provided in this section
- The service provider may apply for reimbursement of relocation expense from the Utility Relocation Reimbursement Grant Program

Effective date: October 1, 2025

**xiii. Utility System Preemptions**

Ch. 2025-42, L.O.F., (CS/HB 1137 (Shoaf; Barnaby)) Expands s. 366.032, F.S., to add boards, agencies, commissions, or authorities of any county, municipal corporation, or political subdivision to the list of local governments that cannot prohibit a utility from using specific fuel sources and from restricting or prohibiting certain types of appliances.

Effective date: July 1, 2025.





## **II. FAILED BILLS (Placeholders)**

- xiv. Affordable Housing**
- xv. Cybersecurity Incident Liability**
- xvi. Development Permits and Orders**
- xvii. Government Accountability**
- xviii. Homestead Exemption Increase**
- xix. Impact Fees**
- xx. Local Business Taxes**
- xxi. Millage Rates**
- xxii. Municipal Utilities**
- xxiii. Municipal Water and Sewer Utility Rates**
- xxiv. Property Tax Exemptions**
- xxv. Reduction of Assessed Value**
- xxvi. Suits Against the Government**
- xxvii. Traffic Infraction Detectors**
- xxviii. Tourist Development**
- xxix. Vacation Rentals**



**FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.**  
**2025-2026 Communication Collaboration**  
**Ad-Hoc Committee Agenda Item**

**2025-2026**

**BOARD LIAISON**

**Rebecca Schnirman**

Director of Financial & Support  
Services, Palm Beach County  
2700 6th Ave S  
Lake Worth, FL 33461-4727  
(561) 966-6650  
[RSchnirman@pbc.gov](mailto:RSchnirman@pbc.gov)

**STAFF LIAISON**

Jill Walker  
Karen Pastula

**Meeting Date: August 22, 2025**

**Title of Item: Communication Collaboration Ad-Hoc  
Committee Update**

**Executive Summary, Explanation or Background:**

**Newsletter:** The committee has successfully produced two newsletter editions of the monthly “Fiscal Forum.” The Fiscal Forum will be published on the first Monday of each month at 2:00pm. Regular content that will be included is outlined in the attached “Monthly Newsletter Template.” In general, all editions will include a leadership spotlight, highlighting specific events/activities/deadlines, committee corner, and local chapter items (if provided). We will also be featuring more video content, and each newsletter will have associated video spotlighting specific content.

**E-Bulletin:** The e-bulletins will continue to be used, but intent will be for content that is extremely important and cannot wait for the next newsletter to be released. We want our members to see our e-bulletins as a “look at this right now it’s very important” type of content.

**Social media:** All social media platforms will continue to be used in conjunction with the newsletter and e-bulletins. Events will be posted more frequently to social media.

**Committee Communications Plan Template:** A template has been prepared for use by the Committee Chairs to submit their content to their Board Liaisons at the beginning of each month. Content specifically for the newsletter should be provided at least one month prior to publication. Content can be provided for future months at any time.



**FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC.**  
**2025-2026 Communication Collaboration**  
**Ad-Hoc Committee Agenda Item**

**Community Platforms:** The Ad-Hoc committee is working with the TLRC ListServ Sub-Committee to research and review various software applications to replace the existing ListServ. League staff will also be included in the discussions and software review. This is still in the initial stages and updates will be provided through the TLRC Committee.

**Content**

Attachments:

- August Edition of Fiscal Forum
- Monthly Newsletter Template
- Committee Communications Plan Template

Recommended Action:

*Rebecca Schnirman*

**Committee Chair**

**08/07/2025**

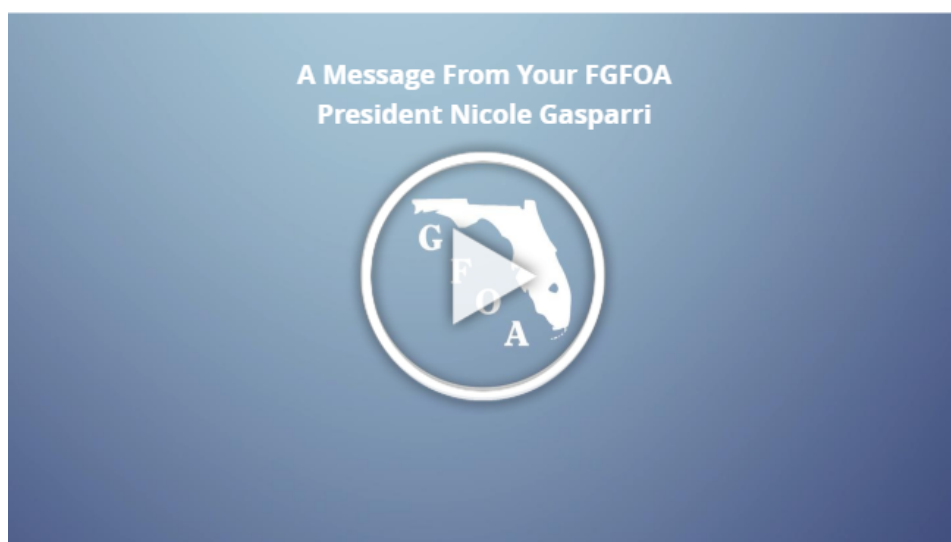
**Date**

**From:** [Florida Government Finance Officers Association](#)  
**Sent:** Monday, August 4, 2025 2:04 PM  
**To:** [Rebecca Schnirman](#)  
**Subject:** FGFOA Monthly Newsletter - Fiscal Forum - August 2025

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**SPOTLIGHT ON LEADERSHIP  
PRESIDENT-ELECT KELLY STRICKLAND**



With more than three decades of experience in governmental accounting, finance, and budgeting, **Kelly Strickland** is a seasoned leader dedicated to public service and financial excellence. She currently serves as the **Director of Financial Administration for the City of Sarasota**, where she leads efforts in budgeting, accounting, cash management, debt issuance, and financial reporting.

Kelly's career has spanned across several Florida communities, including **Sarasota, Martin, Alachua, and Gilchrist counties**, where she has consistently demonstrated a commitment to fiscal responsibility and professional development. Her credentials include **Certified Public Accountant (CPA)**, **Certified Government Finance Officer (CGFO)**, and **Certified Public Pension Trustee (CPPT)**. She earned her **Bachelor's degree in Accounting** from the **University of West Florida**.

[Click Here to Learn More About Kelly Strickland \[tuszotabb.cc.rs6.net\]](https://tuszotabb.cc.rs6.net)

### **It's Time to Renew! FGFOA & Local Chapter Membership Made Easy**

Renewing your FGFOA and local chapter memberships has never been more convenient. Through the continued partnership between FGFOA and its local chapters, members now benefit from a centralized, streamlined renewal process with flexible options tailored to individual preferences.

#### **Choose What Works for You:**

- FGFOA State Dues only (\$90)
- Local Chapter Dues only (varies by chapter)
- Both FGFOA State and Local Chapter Dues (combined at checkout)

#### **Renew by August 30th to continue receiving exclusive member benefits, including:**

- Reduced registration fees for the Annual Conference and the 2025 School of Governmental Finance
- Eligibility to register for our Beginner Boot Camp
- Access to 14 free webinars throughout the year
- Opportunities for professional development and statewide networking

**Renew your membership today and stay connected with your FGFOA community!**

### **Don't Miss Out — Renew Your Chapter Membership Today!**

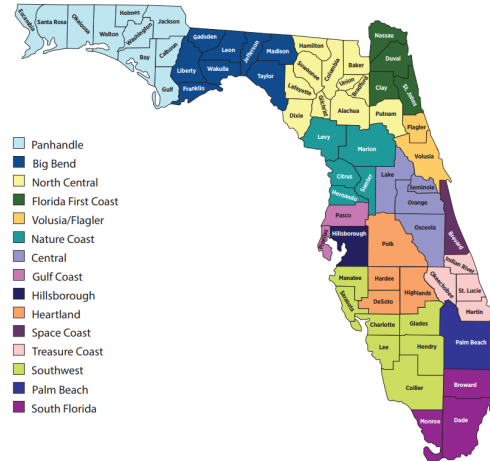
Your local community chapter is buzzing with activity all year long! With **15 dynamic chapters** hosting epic events non-stop, there's no better way to stay connected, inspired, and in the know.

#### **Be part of the excitement!**

Renew now and dive into a year packed with possibilities.

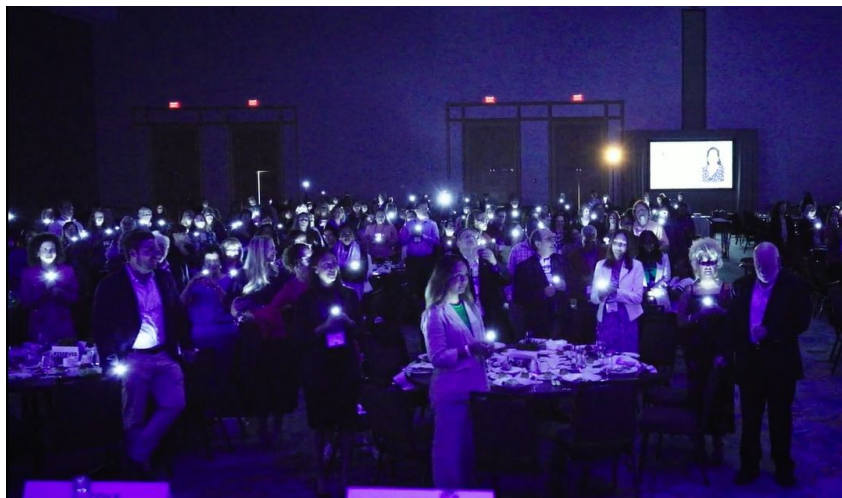
Check out the [Local Chapter Event Calendar \[tuszotabb.cc.rs6.net\]](https://tuszotabb.cc.rs6.net) and find your next big

moment!



[Visit FGFOA.org](http://FGFOA.org) for more information or to renew [[tuszotabb.cc.rs6.net](mailto:tuszotabb.cc.rs6.net)]

## FGFOA MENTORING PROGRAM - GET READY TO IGNITE!!



### Join Us for the First FGFOA Ignite! Mentoring Series Session

Are you ready to take the next step in your professional development or help someone else do the same?

Join Us for the First **FGFOA Ignite!** Mentoring Series Session  
***Discover the Power of Mentoring & Emotional Intelligence***

**Wednesday, August 20, 2025**

**12:00 p.m. – 1:00 p.m.**

**Featuring: FGFOA President Nicole Gasparri**

[RSVP Now! \[\[tuszotabb.cc.rs6.net\]\(mailto:tuszotabb.cc.rs6.net\)\]](mailto:tuszotabb.cc.rs6.net)

## **Mentoring Program Now Accepting Applications Deadline Extended!**

Take your leadership journey to the next level, the FGFOA Mentoring Program is now accepting applications for the 2025–2026 cycle, and the **application deadline has been extended to August 8th!**

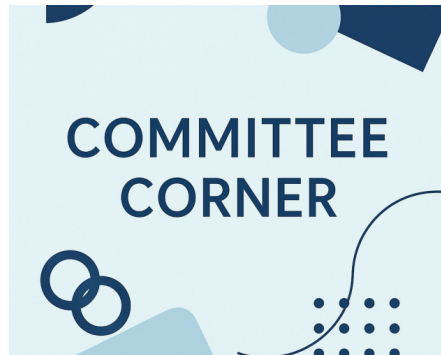
Designed to connect rising professionals with seasoned government finance leaders, this program offers:

- One-on-one mentoring relationships
- Support with career development and goal setting
- Opportunities to expand your professional network and build lasting connections

Whether you're looking to mentor or be mentored, this is your chance to engage in meaningful professional growth.

[Click Here to Apply to Be a Mentor \[tuszotabb.cc.rs6.net\]](https://tuszotabb.cc.rs6.net)

[Click Here to Apply to Be a Mentee \[tuszotabb.cc.rs6.net\]](https://tuszotabb.cc.rs6.net)



### **Join A Committee!**

Are you looking for a meaningful way to contribute to FGFOA while expanding your professional network and enhancing your leadership skills? Serving on a committee is one of the best ways to do just that.

#### **Why Join a Committee?**

- Contribute to the advancement of the profession
- Help shape FGFOA programming and initiatives
- Connect with peers and build lasting relationships
- Gain experience and visibility

Applications are accepted year-round. Most meetings are held virtually. Check out our FAQ and committee descriptions on our website.

Make your voice heard. Be part of the momentum. **Join an FGFOA committee today!**

[FGFOA Committee Information & Application \[tuszotabb.cc.rs6.net\]](https://tuszotabb.cc.rs6.net)



## Shape the Future of the FGFOA Conference!

The **Conference Program Committee** is already cooking up next year's agenda—and we want your genius in the mix!

Got a hot topic or an inspiring speaker in mind? Share your idea through the

**Call for Session Topics** link below and help us build a program that *everyone* will be talking about.

Let's make it unforgettable—starting with YOU!



[Click Here to Submit a Topic \[tuszotabb.cc.rs6.net\]](https://tuszotabb.cc.rs6.net)

## Technical & Legislative Resources Committee

### 2025 Legislative Summary – Government Finance

The FGFOA Technical Resources & Legislative Committee has compiled a summary of passed legislation from the 2025 Session that impacts local government finance. This overview is designed to keep members up to date on the most relevant changes affecting our profession.

Stay connected! Visit the **Technical Resources & Legislative Committee [tuszotabb.cc.rs6.net]** page regularly for updates, including:

- The IRS's first guidance on the Big Beautiful Bill
- A GASB survey on OPEB—if applicable to your government, you may wish to participate
- Additional timely and important resources for finance professionals

[2025 Legislative Summary \[tuszotabb.cc.rs6.net\]](https://tuszotabb.cc.rs6.net)

## Big News, Finance Pros! 2025 FGFOA School of Governmental Finance



The FGFOA School of Governmental Finance is back—and it's bigger than ever! Join us October 27-31 at the beautiful **Hyatt Regency Coconut Point Resort and Spa**.

Mark your calendars: registration kicks off **August 25, 2025**.

Secure your spot early and lock in savings *and* a room at this popular venue!  
This is the conference everyone's talking about... don't let it happen without you!!

### **Calling All Newcomers to Government Finance!**

Ready to build a strong foundation in public finance? Don't miss the  
**FGFOA Beginner Boot Camp**, designed specifically for professionals new to the field!

**Where:** Hyatt Regency Coconut Point Resort and Spa in Bonita Springs  
**When:** October 30–31, held alongside the School of Government Finance

**Registration will open August 18, 2025**

*Please NOTE: Seats for our Beginner Boot Camp are chosen by virtue of a randomized lottery. To register for the FGFOA Beginner Boot Camp Lotter or attend a Boot Camp, you must be an FGFOA Member!*

[Boot Camp Information \[tuszotabb.cc.rs6.net\]](https://tuszotabb.cc.rs6.net)

### **September Webinar: *Understanding Your Financial Statements***

**Date:** Thursday, September 18, 2025  
**Time:** 2:00–3:40 p.m. Eastern  
**CPE Credit:** 1.5 hours (Technical/Business)

**Registration is free for current FGFOA members.** Look for the “Register Now” button on the [FGFOA Webinar page \[tuszotabb.cc.rs6.net\]](https://tuszotabb.cc.rs6.net) or log in to your [member portal \[tuszotabb.cc.rs6.net\]](https://tuszotabb.cc.rs6.net) under the “Events” tab

### **Stay Informed**

[Fiscal Forum Page \[tuszotabb.cc.rs6.net\]](https://tuszotabb.cc.rs6.net)

FGFOA keeps members informed through two key communication tools: **E-Bulletins** and the **Fiscal Forum Newsletter**.

The **Fiscal Forum Newsletter** is your monthly roundup of FGFOA news, events, and resources. Published on the **first Monday of each month at 2:00 PM**, the newsletter offers regular updates and highlights that help you stay connected to what's happening across the organization.

**E-Bulletins**, on the other hand, are FGFOA's fast-track communication tool. These brief, time-sensitive alerts are sent **as needed** to deliver urgent updates directly to members. Whether it's a registration opening, deadline reminder, policy change, or last-minute event detail—if it can't wait for the next newsletter, you'll hear about it in an e-bulletin.

### **Stay Connected with FGFOA!**

Follow the Florida Government Finance Officers Association on social media to get the latest updates, event announcements, and news that matters to government finance professionals.

**Stay informed. Stay engaged. Be part of the FGFOA community.**



[\[tuszotabb.cc.rs6.net\]](https://www.facebook.com/tuszotabb.cc.rs6.net)



[\[tuszotabb.cc.rs6.net\]](https://www.youtube.com/tuszotabb.cc.rs6.net)



[\[tuszotabb.cc.rs6.net\]](https://www.linkedin.com/company/tuszotabb.cc.rs6.net)

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FGFOA Monthly Newsletter-Fiscal Forum  
Month YEAR Edition

Assigned	Section Title	Content	Comments
	Hold for President	Video and written content	This is just a placeholder if President has something to write about or feature here.
	Spotlight on Leadership		After election begin to spotlight each officer and then the board.
	Spotlight on Membership		members will be able to submit someone for consideration.
	Events & Deadlines		deadline dates that we want to add will go here
	Local Chapter News		
	Monthly Featured Webinar		
		<b>Stay Connected with FGFOA!</b> View all current and past <b>E-Bulletins</b> and editions of the <b>Fiscal Forum Newsletter</b> on the FGFOA website: <a href="http://www.fgfoa.org/e-bulletins">www.fgfoa.org/e-bulletins</a> Follow the Florida Government Finance Officers Association on social media to get the latest updates, event announcements, and news that matters to government finance professionals. <b>Stay informed. Stay engaged. Be part of the FGFOA community.</b>  [facebook.com]  [linkedin.com]  [fgfoa.org]	

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# XYZ Committee Communications Plan Template

Deliverable Description	Timeline
	July
	August
	September
	October
	November
	December
	January
	February
	March
	April
	May
	June

[illegible]

[illegible]



**NEXT MEETING:**

Wednesday, October 29, 2025 – Location is Hyatt Regency

Coconut Point, 5001 Coconut Rd, Bonita Springs, FL 34134. This will be in conjunction with the School of Governmental Finance.