

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

Wednesday, October 29, 2025

Hyatt Regency Coconut Point 5001 Coconut Rd, Bonita Springs, FL 34134

Great Egret 9:30 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



ATTENDANCE FGFOA BOARD MEETING October 29, 2025

<u>NOT</u> PRESENT	PRESENT			
		OFFICERS		
		Nicole Gasparri	President	
		Kelly Strickland	President-Elect	
		Melissa Burns	Secretary/Treasure	r
		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 P	RESIDENT	
		Rip Colvin		
		COMMITTEE CHAIR	S	
		Jonathan McKinney	Certification Comm	ittee Chair
		Sarah Simpson	Conference Progra	m Committe Chair
		Wayne Meyer	_	ms Committee Chair
		Tameka Blake	Event Host Commit	
		Jamie Roberson	Local Chapter Com	mittee Chair
		Kadem Ramirez	Professional Develo	opment Committee Chair
		Elizabeth Walter	2025 SOGF Comm	ittee Chair
		Ajay Gajjar	Technical and Legis	slative Resources Committee Chair
		Derek Noonan	Technical and Legis	slative Resources Committee Sub-Chair
		OTHERS IN ATTENI	DANCE	
		Paul Shamoun	FGFOA, Executive	Director
		Karen Pastula	FGFOA, Financial S	
		Jill Walker	FGFOA, Executive	



FGFOA BOARD OF DIRECTORS MEETING AGENDA

DATE/TIME: October 29, 2025

9:30 am Great Egret

Hyatt Regency Coconut Point

5001 Coconut Rd, Bonita Springs, FL 34134

- I. Call to Order Nicole Gasparri, President
- II. Roll Call
- III. Consideration of Minutes August 22, 2025
- IV. Report of Officers
 - A. President Nicole Gasparri
 - 1. Audit Committee Assignment
 - B. President Elect Kelly Strickland
 - 1. Nominating Committee Assignment
 - C. Secretary Treasurer Melissa Burns
 - 1. Financials at June 30, 2025
- V. Executive Director Paul Shamoun
 - A. Membership Report
 - **B.** Investment Report
- VI. Committee Reports
 - A. Certification Committee Board Liaison: Melissa Licourt
 - i. Committee Update
 - B. Conference Program Committee Board Liaison: Anna Otiniano
 - i. 2026 Annual Conference Program Preliminary Session Times

- ii. 2026 Annual Conference Program Preliminary Topics
- C. Educational Programs Committee Board Liaison: Stephen Timberlake
 - i. Committee Update
 - ii. Webinar Schedule
- D. Event Host Committee Board Liaison: Allison Teslia
 - i. Committee Update
- E. Local Chapter Committee Board Liaison: Nicole Gasparri and Kelly Strickland
 - i. Progress Update
 - ii. Florida First Coast Local Chapter Bylaws Amendment
 - iii. Local Chapter Banking Transition
- F. Professional Development Committee Board Liaison: Bill Spinelli
 - i. Committee Update
- G. School of Governmental Finance Board Liaison: Sharon Almeida
- H. Technical and Legislative Resources Committee Board Liaison: Nicole Jovanovski
 - i. Committee Update
- I. Communication Collaboration Committee

 Board Liaison: Rebecca Schnirman
 - i. ListServe Update
- VII. Other Business
- VIII. Next Meeting Friday, January 16, 2026. Location TBD.

FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC. BOARD OF DIRECTORS MEETING MINUTES August 22, 2025

The meeting of the FGFOA Board of Directors took place at the Loews Sapphire Resort in Orlando, FL.

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, Anna Otiniano, Financial Services Director, City of Plantation

Director, Rebecca Schnirman, Director of Financial & Support Services, Palm Beach County

Director, William Spinelli, Chief Financial Officer, Hillsborough County Sheriff's Office

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 August 22, 2025, meeting of the FGFOA Board of Directors to order at 9:35 am.

PRESIDENT REPORT

Minutes

President Gasparri presented the minutes from the July 11, 2025, Board meeting for review.

Mrs. Almeida moved, seconded by Ms. Teslia, to accept July 11, 2025, minutes. Motion passed without objection.

2025-2026 Certification Committee Chair Assignments

President Gasparri next presented Jonathan McKinney as her 2025-2026 Certification Committee Chair for review by the Board. Many people offered to learn to chair and lead in the future. Also, pairings for new teachers for the review course are being made.

President-Elect Strickland moved, seconded by Ms. Licourt, to accept the 2025-2026 Certification Committee Chair as presented. Motion passed without objection.

EXECUTIVE DIRECTOR REPORT

Membership Report

Mr. Shamoun presented the Membership Report for review noting that State and Local Chapter dues renewals are now at a high point for our membership renewals. Access for nonrenewal will be cut-off at the end of September and they will be notified of this via the Fiscal Forum newsletter. A new unintended expense is the cost to FGFOA for credit card processing, which includes a fee for all of the Local Chapter events and renewals. This will be reviewed more intently in the future. No motion was made.

SECRETARY REPORT

Local Chapter Committee

President-Elect Strickland noted the great results brought forth by Mrs. Roberson and the Local Chapter Committee to create a Financial Reporting template to be used for Local Chapters. Bylaws for the Florida First Coast Local Chapter were presented to the FGFOA Board for approval but had not been previously presented to the Florida First Coast Local Chapter Board. They will go back to their Local board for approval or edits and will then be presented again to the FGFOA Board. No motion was made.

PRESIDENT REPORT

Elections/Bylaws/Policy & Procedure

President Gasparri recommends that candidates applying to serve on the FGFOA Board of Directors be submitted to a background check and recommends in-person interview with the candidate. It is recommended to review the option of adding the Immediate Past President as a voting member of the Board. This will be reviewed by the Bylaws Review committee and reviewed at a future Board meeting. No motion was made.

COMMITTEE REPORTS

CGFO Certification Committee

Ms. Licourt presented the agenda item for the CGFO Certification Committee noting that one person had technical difficulties with taking the online test; the Board approved her to take it again. No motion was made.

Annual Conference Program Committee

Mrs. Otiniano presented the updated Policies and Procedures Manual for the Annual Conference Program Committee. Topics are being submitted and speakers chosen for 2026 Annual Conference.

Ms. Licourt moved, seconded by Ms. Teslia, to approve the Annual Conference Program Committee Policies and Procedures Manual as presented. Motion passed without objection.

Educational Programs Committee

Mr. Timberlake presented the Educational Programs Committee report showing the work done by the committee bringing together updated titles and schedule of webinars. The committee does need polling questions that can be used at the beginning of each webinar. No motion was made.

Event Host Committee

Ms. Teslia presented the Event Host Committee report noting that gift bags have been ordered for and volunteers are signing up to help the Event Host team at the 2025 SOGF. Promotional flyers have been created for review and Board approval. It has been decided to cancel the hospitality Suite on Tuesday night at Ann Conf 2026.

Mr. Timberlake made motion, seconded by Mrs. Almeida, to amend the Event Host SOGF budget to increase it by \$2,500 to accommodate food and prizes. Motion passed unanimously.

Professional Development Committee

Mr. Spinelli presented the Mentor program update for the Professional Development Committee. There has

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been good involvement with the new Ignite program. The committee plans to offer this Ignite Program prior to pairings in the future. The next Mentor pairings will begin in January, 2026. No motion was made.

School of Governmental Finance

Mrs. Almeida presented the School of Governmental Finance committee updates with a full schedule for the 2025 SOGF. The speaker for the "Procurement Best Practices" session needs to be replaced.

Ms. Licourt moved, seconded by Mrs. Almeida, to approve the 2025 SOGF schedule as submitted with permission for the Committee Chair to finalize details as needed. Motion passed unanimously.

Technical and Legislative Resources Committee

Mrs. Jovanovski presented the Technical and Legislative Resources Committee update noting the Legislative Summary of bills that have passed, the Basic Government Resources Manual is being updated and other committee activities. No motion was made.

NEXT MEETING

The date for the next Board meeting will be Wednesday, October 29, 2025. It will be held at the Hyatt Regency Coconut Point, Bonita Springs, in conjunction with the School of Governmental Finance.

ATTEST:	
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

Paul Shamoun

Meeting Date: October 29, 2025

Title of Item: Audit Committee Assignment

Executive Summary, Explanation or Background:

The Audit Committee consists of the Immediate Past President, Secretary-Treasurer and one At-large member of the Board of Directors selected by the President. The Committee recommends the selection of the external auditor and coordinates the preparation of the annual financial audit of the FGFOA. This Committee may also be called upon by the President or Board of Directors to oversee other financial, tax and liability issues affecting the FGFOA.

Based on the information above, I am recommending the Audit Committee consist of FGFOA Past President Rip Colvin, Justice Administrative Commission; FGFOA Secretary-Treasurer Melissa Burns, City of St. Augustine; and at-large Board member Nicole Jovanovski, Sarasota County.

Recommended Action: Approval

Nicole Gasparri October 15, 2025

Nicole Gasparri, FGFOA President



2025-2026 Board of Directors President-Elect 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

Paul Shamoun

Meeting Date: October 29, 2025

Title of Item: Nominating Committee Assignment

Executive Summary, Explanation or Background:

Each year the President Elect assigns 2 members to serve on the Nominating Committee. My selections are Mindy Miller, Budget Manager at the City of Pensacola, and Rebecca Spuhler (pending) Finance Director at the City of Large

(pending) Finance Director at the City of Largo.

Recommended Action: For review and approval.

Kelly Strickland

<u> October 3, 2025</u>

Kelly Strickland, FGFOA President-Elect



FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC. 2025-2026 Board of Directors Secretary/Treasurer Agenda Item

2025-2026 BOARD OF DIRECTORS OFFI<u>CERS Pres</u>ident Nicole Gasparri

Meeting Date: October 29, 2025

President-Elect Kelly Strickland **Title of Item:** Financials at June 30, 2025

Secretary/Treasurer Melissa Burns

Executive Summary, Explanation or Background:

DIRECTORS Sharon <u>Almeida</u> Nicole

Attached are the financials as at June 30, 2025.

Jovanovski Melissa

Licourt Anna Otiniano

Rebecca Schnirman

William Spinelli Allison

Teslia Stephen

Timberlake

Recommended Action:

PAST PRESIDENT Rip

Colvin

For review and approval

EXECTUIVE DIRECTOR
Paul Shamoun

Melissa Burns

October 15, 2025

Melissa Burns, Secretary/Treasurer

Comparative Statement of Financial Position June 30, 2025

	ACTUAL 6/30/2025	PRIOR FYE 6/30/2024
ASSETS		
Current Assets:		
Cash - Capital City Bank	652,852	711,863
Investments - Vanguard	171,251	18,320
Investments - CDs	0	261,070
Accounts Receivable	5,440	4,750
Accounts Receivable - Other	11,545	43,954
Prepaid Expenses	5,002	4,823
Prepaid School of Gov Financial Expenses	0	1,646
Deposits	31,000	7,500
Total Current Assets	877,090	1,053,927
Other Assets		
Deposits	0	0
Prepaid	0	0
Total Other Assets	0	0
Total Assets	877,090	1,053,927
LIABILITIES AND NET ASSETS		
Current Liabilities:		
Deferred Income	140	0
Accounts Payable	748,669	847,799
Total Current Liabilities	748,809	847,799
Unrestricted Net Assets	128,281	206,129
Total Liabilities and Unrestricted Net Assets	877,090	1,053,927

Statement of Activities
For the Twelve Months Ended June 30, 2025

	ACTUAL 7/1/2024 to 6/30/2025	BUDGET AMENDED 7/1/2024 to 6/30/2025	BUDGET % OF BUDGET SPENT	BUDGET VARIANCE YEAR to DATE	PRIOR FYE 7/1/2023 to 6/30/2024
REVENUES					
Membership Dues	264,075	252,000	105%	12,075	233,450
Investment Income	8,924	10,000	89%	(1,076)	9,083
Annual Conference	792,483	895,400	89%	(102,917)	747,879
School of Governmental Finance	126,430	128,000	99%	(1,570)	98,057
Pre Conference Seminars	37,550	25,000	150%	12,550	30,050
Leadership FGFOA	28,405	29,900	95%	(1,495)	20,895
Boot Camps	72,990	118,800	61%	(45,810)	99,425
CGFO Fees	44,068	36,000	122%	8,068	29,300
Local Chapter Support	1,520	0	0%	1,520	1,245
Ethics Classes	16,650	25,000	67%		10,200
Miscellaneous Income	25	23,000	0%	(8,350) 25	10,200
Wiscondicous meome		0	070		
TOTAL REVENUES	1,393,119	1,520,100	92%	(126,980)	1,279,584
EXPENSES					
Professional Services:					
Florida League of Cities, Inc.	187,000	187,000	100%	0	137,000
Auditor Fees	14,250	14,000	102%	250	12,300
Total - Professional Services	201,250	201,000	100%	250	149,300
Meeting Expenses:					
Board of Directors	40,824	53,500	76%	(12,676)	49,621
Strategic Planning	9,987	6,000	166%	3,987	7,713
GFOA Conference	7,728	10,000	77%	(2,272)	985
GFOA Reception	6,048	10,000	60%	(3,952)	7,192
Total - Meeting Expenses	64,586	79,500	81%	(14,914)	65,511
Training/Education:					
Conference Expenses	781,215	799,000	98%	(17,785)	874,647
School of Governmental Finance	124,130	117,250	106%	6,880	109,880
Pre Conference Seminars	33,430	22,000	152%	11,430	34,248
Leadership FGFOA	61,282	79,250	77%	(17,968)	67,758
Boot Camps	87,168	97,200	90%	(10,033)	57,644
CGFO Expenses	21,951	21,500	102%	451	12,663
NASBA Fees	875	2,500	35%	(1,625)	875
Ethics Classes	12,625	20,000	63%	(7,375)	9,210
Local Chapter Support	3,928	5,000	79%	(1,072)	16,798
Total - Training/Education	1,126,603	1,163,700	97%	(37,098)	1,183,722
Standing Committees:					
Standing Committee Meetings	1,558	1,000	156%	558	982
All Committee Meetings@ Conference	5,970	7,000	85%	(1,030)	5,197
Total - Standing Committees	7,528	8,000	94%	(472)	6,179

	ACTUAL 7/1/2024 to	BUDGET AMENDED 7/1/2024 to	BUDGET % OF BUDGET	BUDGET VARIANCE YEAR to	PRIOR FYE 7/1/2023
	6/30/2025	6/30/2025	SPENT	DATE	6/30/2024
Communication to Members:					
Postage & Mailing	382	1,000	38%	(618)	174
Internet Homepage	0	500	0%	(500)	0
Printing & Duplicating	0	0	0%	0	459
Total - Communication to Members	382	1,500	25%	(1,118)	632
Administrative Expenses:					
Insurance Expense	5,003	6,500	77%	(1,497)	6,691
List Serve	1,983	3,000	66%	(1,017)	4,409
Filings and Registrations	61	100	61%	(39)	1,249
Staff Travel	407	2,000	20%	(1,593)	979
Miscellaneous Expense	0	2,500	0%	(2,500)	964
Credit Card & Bank Fees	63,165	40,000	158%	23,165	44,067
Total - Administrative Expenses	70,619	54,100	131%	16,519	58,359
TOTAL EXPENSES	1,470,967	1,507,800	98%	(36,833)	1,463,703
Increase (Decrease) in Unrestricted Net Assets	(77,848)	12,300			(184,119)
Unrestricted Net Assets, Beginning of Period	206,129	206,129			390,248
Unrestricted Net Assets, End of Period	128,281	218,429			206,129

Annual Conference

	2025 ACTUAL	2025 BUDGET	VARIANCE	2024 ACTUAL
REVENUE COMPARISON				
REGISTRATIONS				
Registration Fees	485,760	533,400	(47,640)	454,075
TOTAL REGISTRATIONS	485,760	533,400	(47,640)	454,075
OTHER REVENUE				
Exhibitor Fees & Sponsorships	252,100	305,000	(52,900)	250,350
Hotel Rebates/Commissions	54,623	57,000	(2,377)	43,454
TOTAL OTHER REVENUES	306,723	362,000	(55,277)	293,804
TOTAL REVENUES	792,483	895,400	(102,917)	747,879
EXPENSE COMPARISON				
INSTRUCTIONAL				
Equipment Rental	60,679	60,000	679	56,307
Speaker per diem/honorarium	16,788	18,000	(1,212)	10,399
Opening Ceremony	675	500	175	300
Host Committee	0	1,000	(1,000)	108
Welcome Bags	7,270	7,500	(230)	6,526
Speaker Gifts	3,317	3,500	(183)	1,859
Internet Cafe' - High Speed Connections	11,670	15,000	(3,330)	20,919
TOTAL INSTRUCTIONAL EXPENSE	100,399	105,500	(5,101)	96,418
FOOD & BEVERAGE				
Refreshment Breaks	234,786	250,000	(15,214)	261,244
Tuesday Business Luncheon	67,268	60,000	7,268	69,667
Monday Lunch	25,901	25,000	901	24,035
Association Night	71,106	75,000	(3,894)	70,761
Hospitality Food, Beverages & Supplies	27,134	35,000	(7,866)	35,921
TOTAL FOOD & BEVERAGE EXPENSE	426,195	445,000	(18,805)	461,628
SPECIAL EVENTS				
Tuesday Event	77,354	80,000	(2,646)	90,589
President's Reception	13,472	16,000	(2,528)	12,411
Emerging Leaders Reception	2,057	6,000	(3,943)	5,782
Transportation	0	10,000	(10,000)	5,100
TOTAL SPECIAL EVENTS EXPENSE	92,883	112,000	(19,117)	113,882

	2025 ACTUAL	2025 BUDGET	VARIANCE	2024 ACTUAL
SPECIAL CONFERENCE EXPENSES				
Room Rate Buy Down	54,650	50,000	4,650	112,110
Exhibit Hall Security	12,255	7,500	4,755	10,535
Exhibit Hall Service	42,978	25,000	17,978	24,280
Meeting Planner Services	29,800	25,000	4,800	30,650
TOTAL SPECIAL CONFERENCE EXPENSES	139,683	107,500	32,183	177,575
OTHER				
Miscellaneous	0	5,000	(5,000)	10,111
Insurance	7,286	4,000	3,286	4,105
Staff Expenses	11,106	15,000	(3,894)	7,163
Supplies	489	2,000	(1,511)	936
Printing/Duplicating	3,174	3,000	174	2,827
TOTAL OTHER EXPENSES	22,055	29,000	(6,944)	25,142
TOTAL EXPENSES	781,215	799,000	(17,785)	874,645
INCREASE (DECREASE) IN NET ASSETS	11,268	96,400	(85,132)	(126,766)

School of Governmental Finance For the Twelve Months Ended June 30, 2025

	2025 ACTUAL	2025 BUDGET	VARIANCE	2024 ACTUAL
REVENUE COMPARISON				
REGISTRATIONS	444.000	40-000		
Registration Fees	114,220	107,000	7,220	93,325
TOTAL REGISTRATIONS	114,220	107,000	7,220	93,325
OTHER REVENUE				
Exhibitor Fees & Sponsorships	0	15,000	(15,000)	0
Hotel Rebates/Commissions	12,210	6,000	6,210	4,732
TOTAL OTHER REVENUES	12,210	21,000	(8,790)	4,732
TOTAL REVENUES	126,430	128,000	(1,570)	98,057
EXPENSE COMPARISON				
EXPENSES				
Hospitality Suite	14,151	10,000	4,151	7,655
Refreshment Breaks	57,624	55,000	2,624	60,317
Welcome Reception	8,638	10,000	(1,362)	5,702
Emerging Leader Reception	7,812	0	7,812	0
Staff Travel	6,807	10,000	(3,193)	11,912
Internet Cafe/WIFI	0	2,500	(2,500)	0
Equipment Rentals	16,231	15,000	1,231	11,465
Speaker Expense	0	1,000	(1,000)	1,367
Speaker Gifts	1,890	2,000	(110)	1,435
Printing/Duplicating	535	0	535	508
Meeting Planning Services	6,730	6,500	230	6,650
Welcome Bags	1,953	2,500	(547)	2,868
Insurance	1,646	2,000	(354)	0
Operating Supplies	113	750	(637)	0
TOTAL EXPENSES	124,130	117,250	6,880	109,879
INCREASE (DECREASE) IN NET ASSETS	2,300	10,750	(8,450)	(11,822)

Bootcamps

	2025 ACTUAL	2025 BUDGET	VARIANCE	2024 ACTUAL
REVENUE COMPARISON				
REGISTRATIONS				
Registration Fees	72,990	118,800	(45,810)	99,425
TOTAL REVENUES	72,990	118,800	(45,810)	99,425
EXPENSE COMPARISON				
EXPENSES				
Refreshment Breaks	21,778	27,000	(5,222)	9,528
Lunch	25,912	22,500	3,412	16,927
Staff Travel	5,136	4,500	636	2,472
Equipment Rentals	5,150	9,000	(3,850)	1,482
Speaker Expense	25,373	27,000	(1,627)	19,683
Printing/Duplicating	0	2,700	(2,700)	819
Room Rental	3,819	4,500	(681)	6,733
TOTAL EXPENSES	87,168	97,200	(10,033)	57,644
INCREASE (DECREASE) IN NET ASSETS	(14,178)	21,600	(35,777)	41,781

CGFO

	2025 ACTUAL	2025 BUDGET	VARIANCE	2024 ACTUAL
REVENUE COMPARISON				_
REGISTRATIONS				
Renewals	9,480	7,000	2,480	6,600
Application Fee	5,775	4,000	1,775	4,525
Review Courses	18,063	15,000	3,063	11,395
Exams	10,750	10,000	750	6,780
TOTAL REVENUES	44,068	36,000	8,068	29,300
EXPENSE COMPARISON				
EXPENSES				
Food & Beverage	0	6,500	(6,500)	0
Printing and Mailing	1,992	1,000	992	220
Exam Rewrite or Update	4,800	5,000	(200)	0
Testing Fees	9,990	6,000	3,990	9,490
Equipment Rental	5,169	3,000	2,169	2,952
TOTAL EXPENSES	21,951	21,500	451	12,662
INCREASE (DECREASE) IN NET ASSETS	22,117	14,500	7,617	16,638

Leadership FGFOA

	2025 ACTUAL	2025 BUDGET	VARIANCE	2024 ACTUAL
REVENUE COMPARISON				
REGISTRATIONS				
Registration Fees	28,405	29,900	(1,495)	20,895
TOTAL REVENUES	28,405	29,900	(1,495)	20,895
EXPENSE COMPARISON				
EXPENSES				
Hotel Fee	17,603	25,000	(7,397)	21,418
Lunch & Refreshment Breaks	8,153	13,000	(4,847)	8,206
Dinner	5,396	6,500	(1,104)	6,893
Staff Travel	2,192	3,000	(808)	3,391
Equipment & Room Rental	2,797	4,000	(1,203)	2,468
Speaker Expenses and Travel	18,446	24,000	(5,554)	21,602
Awards	1,695	1,750	(55)	1,732
Printing/Duplicating	3,000	0	3,000	49
Supplies	0	0	0	0
Meeting Planning Services	2,000	2,000	0	2,000
TOTAL EXPENSES	61,282	79,250	(17,968)	67,759
INCREASE (DECREASE) IN NET ASSETS	(32,877)	(49,350)	16,473	(46,864)

Supplemental Information For the Twelve Months Ended June 30, 2025

A	Dagairrables	
Accounts	Receivable:	

Accounts Receivable:		
Registration Fees	5,250	Boot Camp
Membership Dues	190	Dues
Local Chapter	95	Local Chapter overpayment
Hotel Rebate	11,450	Annual Conference
Total Accounts Receivable	16,985	
Deposits:		
Current: Loews Hotels	25,000	2026 Annual Conference Denogit
Hyatt Regency	25,000 5,000	2026 Annual Conference Deposit 2025 School Deposit
Best Western	1,000	2025 School Deposit 2025 Boot Camp Deposit
Non-Current:		
Total Deposits	31,000	
Accounts Payable:		
Members	0	
Vendors	45,391	Various
FLC	702,677	Expense Reimbursements
FGFOA Local Chapters	600	Local Chapter Dues & Events
Total Accounts Payable	748,669	
Miscellaneous Expense:		
Total Miscellaneous Expense	0	



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 Teslia
Stephen Timberlake

PAST PRESIDENT

Rip Colvin

EXECTUIVE DIRECTOR
Paul Shamoun

Meeting Date: October 29, 2025

Title of Item: Membership Report

Executive Summary, Explanation or Background:

Membership Paid	10/06/25	06/30/2025	06/30/2024
Government:	1,563	2,734	2,715
Associate:	75	384	238
Lifetime/Retired:	52	58	41
Student:	20	26	15
Total:	1,710	3,202	3,009

<u>CGFO</u>

Total number of members with CGFO: 552

Total applications since July 1, 2025: 19

Recommended Action:

October 6, 2025

Paul Shamoun, Date

Executive Director

FGFOA Listserve Report August 1, 2025 thru October 8, 2025

<u>List Title</u>	Number of Subscribers
Accounting, Auditing & Financial Reporting	644
Budgeting	572
Debt & Treasury	355
Financial Administration	581
Personnel & Payroll	383

Accounting & Auditing

ACFR Software (4 Messages)

<u>Annual Investment Training</u> (5 Messages)

BS & A - ADHOC and UB Reports (5 Messages)

BS&A Users (2 Messages)

Capital Asset Policy (3 Messages)

Chart of Accounts Redesign (1 Message)

CMAR Fees (2 Messages)

<u>Collection procedures or code</u> (1 Message)

<u>Debt Issuance Accounting Entries</u> (2 Messages)

GASB 18 - Clarification on Closure/Post-Closure Liability Recognition (1 Message)

<u>Inquiry: Arbitrage Rebate Report Vendors</u> (7 Messages)

IRS audits (4 Messages)

Local TIF Agreements (1 Message)

Payroll Taxes - Fringe Benefits (1 Message)

Procurement on pre-owned vehicles (1 Message)

Request for Policies on Unassigned Fund Balance and Emergency Reserve (2 Messages)

Retiree health insurance (1 Message)

RFP for Banking Services (1 Message)

[EXTERNAL]ACFR Software (1 Message)

Budgeting

Seeking Recommendations for PCI Compliance Audit Vendors (1 Message)

Debt & Treasury

[EXTERNAL] Custodian (1 Message)

Financial & Administration

BS & A - ADHOC and UB Reports (1 Message)

<u>Internal fund loan</u> (1 Message)

Local TIF Agreement (1 Message)

<u>Procurement on pre-owned vehicles</u> (1 Message)

Reserves for Debris Removal (1 Message)

Reserves for Debris Removal etc. (1 Message)

RFP for Banking Services (2 Messages)

Sanitation/Solid Waste Rates (6 Messages)

Solid Waste Full Cost Accounting Disclosure (2 Messages)

Stormwater ERU review (1 Message)

<u>Tax on Public Property Rentals</u> (1 Message)

Personnel & Payroll

<u>Finance Directors' Compensation and Responsibilities</u> (7 Messages)
<u>Payroll Taxes - Fringe Benefits</u> (1 Message)



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

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Allison Teslia

Stephen Timberlake

PAST PRESIDENT
Rip Colvin

EXECTUIVE DIRECTOR
Paul Shamoun

Meeting Date: October 29, 2025

Title of Item: Investment Report

Executive Summary, Explanation or Background:

Content: Money Market Account as at 09/30/2025

PURCHASED	BANK	AMOUNT	APY
MONEY MARKET ACCOUNT	Vanguard	\$173,067.92	4.39%

Recommended Action: Review

Paul Shamoun,

Executive Director

October 15, 2025



Florida Government Finance Officers Association, Inc. 2025-2026 Certification Committee Agenda Item

2025-2026 <u>CHAIRPERSON</u> John McKinney, CGFO, FRA-RP

Finance Director City of Deltona (386) 878-8978 jmckinney@deltonafl.gov

BOARD LIAISON

Missy Licourt

STAFF LIAISON

Karen Pastula

COMMITTEE MEMBERS

Rebecca Bowman

Teri Butler

John Broschart

Sondra Collamore

Rip Colvin

Ian Evans-Smith

Lin Feng

Sheila Goldman

Ann Harris Wynter

Jeanette Haynes

Carlisha Jenkins

Linda Logan-Short

Karin Lu

Karen Malcolm

Tanra-Lee Milson

Michael Perry

Mary-Lou Pickles

Liliya Sablukova

Alicia Sheffield

Kelly Strickland

Allen Weeks

Chelsie Wilson

Meeting Date: October 29, 2025

Title of Item: Certification Committee Report – Policy

Discussion

Executive Summary, Explanation or Background:

Content:

Committee is requesting Board directions if they would like the committee to provide policy clarification on Associate members that are CGFOs and have left government employment. Specifically, regarding bi-annual renewal requirements.

Recommended Action: None At this time

October 14, 2025

Committee Chair 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

BOARD LIAISON
Anna Otiniano

COMMITTEE CO-CHAIR
Ben Salz

STAFF LIAISON

Jill Walker

Meeting Date: October 29, 2025

Title of Item: 2026 Annual Conference Program Preliminary

Session Times

Executive Summary, Explanation or Background:

Attached please find the preliminary schedule outline for the conference.

Content: Last year's session times and credits are presented with changes notated with a strikethrough and potential changes are in red.

Option 1 and 2 present the same times aside for options on Tuesday. Both options result in a total of 30 credit hours.

Recommended Action: The Board review the schedule and provide any suggestions and/or guidance regarding session schedule to assist with the planning stages.

Sarah Simpson 10/09/25
Sarah Simpson, Date
Conference Program Committee Chair

2026 FGFOA Conference Program Preliminary Schedule June 13 - 17, 2026 | Lowes Sapphire Falls Resort at Universal Orlando | Orlando, FL

Saturday June 13, 2026

	Time In	Time Out	# of Sessions	Session Minutes	Credits
Sessions	8:00 AM	9:40 AM	2	100	2
Break	9:40 AM	10:00 AM			
Sessions	10:00 AM	11:40 AM	2	100	2
Lunch	11:40 AM	1:00 PM			
Sessions	1:00 PM	2:40 PM	2	100	2
Break	2:40 PM	3:00 PM			
Sessions	3:00 PM	4:40 PM	2	100	2

Sunday June 14, 2026

	Time In	Time Out	# of Sessions	Session Minutes	Credits	
First Time Attendees 11:00am - 11:45am						
FGFOA Ch	napter Pres	ident's Rοι	ındtable 12:00) - 12:45pm		
(I do not believe this	took place	in 2025 du	e to timing of	First Time	Attendees	
	& Oper	ing Genera	l Session)			
Opening General Session	1:00 PM	2:40 PM	TBD	100	1.5 or more	
Break	2:40 PM	3:00 PM				
Sessions 3:00 PM 4:40 PM TBD 100 2						
	A	ssociation	Night			

2026 FGFOA Conference Program Preliminary Schedule June 13 - 17, 2026 | Lowes Sapphire Falls Resort at Universal Orlando | Orlando, FL

Monday June 15, 2026

	Time In	Time Out	# of Sessions	Session Minutes	Credits	
					1.5	
2nd General Session	8:00 AM	9:40 AM	TBD	100	2	
Break	9:40 AM	10:00 AM				
		11:15 AM		75	1.5	
Sessions	10:00 AM	11:40 AM	TBD	100	2	
Standing Committee Meetings 11:20 AM - 12:30 PM						

11:50 AM - 12:50 PM

Sessions	1:00 PM	2:40 PM	TBD	100	2
Break	2:40 PM	3:00 PM			
Sessions	3:00 PM	4:40 PM	TBD	100	2

Dynamic Leadership Reception 5:00pm - 6:30pm

2026 FGFOA Conference Program Preliminary Schedule

June 13 - 17, 2026 | Lowes Sapphire Falls Resort at Universal Orlando | Orlando, FL

Tuesday June 16, 2026

	Time In	Time Out	# of Sessions	Session Minutes	Credits
Sessions	8:00 AM	9:40 AM	TBD	100	2
Break	9:40 AM	10:00 AM			
Sessions	10:00 AM	11:15 AM	TBD	75	1.5

Annual Business Meeting, Innovation Awards Luncheon & Past Presidents Recognition

11:30 AM - 1:15 PM

11:30 AM - 12:55 PM

	1:30 PM	3:10 PM			
Sessions	1:15 PM	2:55 PM	TBD	100	2
	3:10 PM	3:30 PM			
Break	2:55 PM	3:00 PM			
	3:30 PM	4:45 PM		75	1.5
Sessions	3:00 PM	4:40 PM	TBD	100	2

Tuesday Night Event

Wednesday June 17, 2026

	Time In	Time Out	# of Sessions	Session Minutes	Credits
Sessions	9:15 AM 9:00 AM	10:30 AM 10:40 AM	TBD	75 100	1.5 2
Break	10:30 AM 10:40 AM	11:00 AM			
Sessions	11:00 AM	11:50 AM	TBD	50	1

Total Credit
Offerings

2025 28.00

2026 30.00

2026 FGFOA Conference Program Preliminary Schedule June 13 - 17, 2026 | Lowes Sapphire Falls Resort at Universal Orlando | Orlando, FL

Saturday June 13, 2026

	Time In	Time Out	# of Sessions	Session Minutes	Credits
Sessions	8:00 AM	9:40 AM	2	100	2
Break	9:40 AM	10:00 AM			
Sessions	10:00 AM	11:40 AM	2	100	2
Lunch	11:40 AM	1:00 PM			
Sessions	1:00 PM	2:40 PM	2	100	2
Break	2:40 PM	3:00 PM			
Sessions	3:00 PM	4:40 PM	2	100	2

Sunday June 14, 2026

	Time In	Time Out	# of Sessions	Session Minutes	Credits	
First Time Attendees 11:00am - 11:45am						
FGFOA Ch	FGFOA Chapter President's Roundtable 12:00 - 12:45pm					
(I do not believe this took place in 2025 due to timing of First Time Attendees						
	& Oper	ing Genera	l Session)			
Opening General Session	1:00 PM	2:40 PM	TBD	100	1.5 or more	
Break	2:40 PM	3:00 PM				
Sessions	3:00 PM	4:40 PM	TBD	100	2	
Association Night						

2026 FGFOA Conference Program Preliminary Schedule June 13 - 17, 2026 | Lowes Sapphire Falls Resort at Universal Orlando | Orlando, FL

Monday June 15, 2026

	Time In	Time Out	# of Sessions	Session Minutes	Credits
2nd General Session	8:00 AM	9:40 AM	TBD	100	1.5 2
Break	9:40 AM	10:00 AM			
Sessions	10:00 AM	11:15 AM 11:40 AM	TBD	75 100	1.5 2
Standing Committee Meetings 11:20 AM - 12:30 PM 11:50 AM - 12:50 PM					
Sessions	1:00 PM	2:40 PM	TBD	100	2

Dynamic Leadership Reception 5:00pm - 6:30pm

TBD

100

2

3:00 PM

4:40 PM

2:40 PM

3:00 PM

Break

Sessions

2026 FGFOA Conference Program Preliminary Schedule

June 13 - 17, 2026 | Lowes Sapphire Falls Resort at Universal Orlando | Orlando, FL

Tuesday June 16, 2026

	Time In	Time Out	# of Sessions	Session Minutes	Credits
Sessions	8:00 AM	9:40 AM	TBD	100	2
Break	9:40 AM	10:00 AM			
		11:15 AM		75	1.5
Sessions	10:00 AM	11:40 AM	TBD	100	2

Annual Business Meeting, Innovation Awards Luncheon & Past Presidents Recognition

11:30 AM - 1:15 PM 11:50 AM - 1:15 PM

Sessions	1:30 PM	3:10 PM	TBD	100	2
		3:30 PM			
Break	3:10 PM	3:15PM			
	3:30 PM	4:45 PM			
Sessions	3:15 PM	4:30 PM	TBD	75	1.5

Tuesday Night Event

Wednesday June 17, 2026

	Time In	Time Out	# of Sessions	Session Minutes	Credits
Sessions	9:15 AM 9:00 AM	10:30 AM 10:40 AM	TBD	75 100	1.5 2
Break	10:30 AM 10:40 AM	11:00 AM			
Sessions	11:00 AM	11:50 AM	TBD	50	1

Total Credit Offerings

2025 28.00

2026 30.00



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

BOARD LIAISON
Anna Otiniano

COMMITTEE CO-CHAIR
Ben Salz

STAFF LIAISON
Jill Walker

Meeting Date: October 29, 2025

Title of Item: 2026 Annual Conference Program Preliminary

Topics

Executive Summary, Explanation or Background:

The Annual Conference Program Committee has been working hard and is excited to present the preliminary list of conference session topics and descriptions for the Boards review.

Content: Each Sub-Committee has provided a list of ranked topics and descriptions for your review.

Recommended Action:

The Board review the current list and provide any suggestions and/or guidance regarding the class offerings.

Sarah Simpson	10/9/25	
Sarah Simpson,	Date	
Conference Program Committee Ch	air	

Accounting, Auditing and Financial Reporting

Rank	Session Title	Session Description
1	GASB Update: Upcoming Initiatives and Requirements	Come and get an overview of the latest developments from the Governmental Accounting Standards Board (GASB), with a focus on upcoming initiatives and new reporting requirements that will impact local governments. Participants will learn about recently issued statements, projects currently on the GASB agenda and anticipated changes in areas such as financial reporting, disclosures and compliance. The session will highlight key timelines and practical steps finance officers can take now to prepare for implementation.
2	Single Audit Essentials: Requirements & Best Practices	This session will provide a comprehensive overview of Single Audit requirements, SEFA preparation and compliance practices. Participants will learn how to account for grants, strengthen internal controls and prepare accurate SEFAs, including reporting expenditures and deferred revenue. The session will also highlight common audit findings, pitfalls to avoid and key updates under the Uniform Guidance to equip staff with practical tools for successful audits and long-term compliance.
3	Avoiding Common Audit Findings in Local Government	Do you know what the most common audit finds are? Would you like to learn some practical strategies to address and prevent them? In this session participants will gain valuable insights into internal control weaknesses, compliance issues and reporting challenges, along with proven best practices to enhance financial management and minimize the risk of recurring findings.
4	Guardians of the Public Trust: Ethics and Controls in Government Finance	Want to build strong internal controls that reduce fraud risk and support ethical decision making in government finance? Then this session is for you. Participants will explore common control gaps, practical ways to "plug" them, and strategies for maintaining effective oversight in organizations of all sizes. Interactive case studies and ethical scenarios will highlight real-world challenges and provide tools to strengthen accountability and trust.
5	GASB's Rear-View Mirror: Recent Implementations and Lessons Learned	This session will provide a practical look back at recently implemented and newly effective GASB standards, highlighting lessons learned and best practices from the field. Topics will include accounting for and tracking leases (GASB 87) and SBITAs (GASB 96), capital asset reporting challenges and the new requirements for compensated absences under GASB 101. The session will also touch on other recent standards, including GASB 99 (Omnibus 2022) and GASB 100 (Accounting Changes and Error Corrections), offering insights on implementation, common pitfalls and strategies to ensure smoother adoption and stronger financial reporting going forward.
6	Auditor General and Department of Financial Services Update	The latest updates from the Florida Auditor General and the Department of Financial Services will be covered at this session. Participants will hear about recent audit trends, reporting requirements, legislative changes and key initiatives affecting local governments. Learn what's new, what's on the horizon and how these updates may impact your financial reporting and compliance responsibilities.

Accounting, Auditing and Financial Reporting

	/1000 William	g, Auditing and I maneral Reporting
Rank	Session Title	Session Description
7	Follow the Money: Forensic Auditing in Action	This session will introduce participants to forensic auditing and fraud detection techniques. Using case studies and practical examples, attendees will learn how to identify red flags, apply simple detection methods and understand the role and purpose of forensic audits in government finance. The focus will be on equipping finance professionals with the knowledge and tools needed to uncover fraud and respond effectively.
8	Getting Audit-Ready: Strategies to Streamline and Simplify Your Next Audit	Ever wonder what auditors are really looking for and why the audit process can feel so time-consuming? In this session, participants will learn about common audit findings and gain practical strategies to prepare effectively, address potential issues in advance, and collaborate efficiently with auditors. You'll walk away with actionable tips to streamline the process, minimize disruptions, and help ensure your auditors are in and out as quickly as possible.
9	Elevate Your ACFR: Tips, Tools, and Techniques for Better Reporting	Designed for both beginners and experienced preparers, this session will cover the essential components of the Annual Comprehensive Financial Report (ACFR) and highlight best practices for producing a clean, reader-friendly report. Using examples from different types of governments, the session will emphasize common pitfalls to avoid and practical improvements that can elevate your ACFR.
10	Small Government Focus: Challenges and Best Practices (*Evolution Series)	Florida's small governments and special districts often face unique challenges due to limited budgets and small staffs handling multiple responsibilities. This session will explore how these entities differ from larger counties and cities in terms of reporting requirements, compliance obligations, and day-to-day operations. Participants will gain practical strategies and best practices to help small governments improve efficiency, accountability, and financial management.
11	Disaster Reimbursements & Florida's F-ROC Program	The first half of this session will provide guidance on the FEMA and FDEM reimbursement process in Florida, including required documentation, eligible costs, and strategies to maximize recovery funding while avoiding common pitfalls. It will then introduce the Florida Recovery Operations Center (F-ROC), a new initiative designed to streamline and simplify the FEMA Public Assistance process, helping applicants recover faster, reduce risk, and evaluate participation in the program in the second half.
12	Accounting and Oversight for Florida's Constitutional Offices	This session will review the unique accounting and audit responsibilities of Florida's Constitutional Offices, including the Clerk, Sheriff, Property Appraiser, Tax Collector, and Supervisor of Elections. Special focus will be given to the Clerk's role as Comptroller, highlighting responsibilities in financial oversight, auditing practices and proactive review of payments. Panelists will discuss how these independent offices integrate into financial statements, opportunities for collaboration, common pitfalls to avoid and best practices that strengthen accountability, compliance and public trust.

Accounting, Auditing and Financial Reporting

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Rank	Session Title	Session Description		
13	Smooth Audits Ahead: Best Practices in Selecting an Auditor and Setting Up an Audit Committee	This session will outline proven strategies for selecting the right external auditor and establishing an effective audit committee. Participants will learn best practices that promote transparency, strengthen oversight and set the foundation for smooth, efficient audits.		
14	Enhancing Pension and OPEB Disclosures with Best Practices	As GASB reconsiders whether pension and OPEB notes are truly "essential," now is the perfect time to rethink how these disclosures are presented. This session will share proven best practices developed over the past decade to transform lengthy, complex notes into disclosures that are shorter, clearer and more reader-friendly—improvements you can implement immediately.		
15	Sales Tax Essentials and 1099 Reporting	This session will cover key laws, policies, exemptions and best practices for sales and use tax and 1099 reporting, along with the basics of Florida sales tax. Special focus will be given to when local governments may be responsible for collecting tax, including rules for concessionaires at recreational facilities, airports and similar venues.		

Pre-Conference Procurement

Rank	Session Title	Session Description
1	Procurement Strategies	This session will discuss various purchasing strategies including ITBs, RFQs, piggybacking, sole source, GSA, etc. The discussion will consider appropriate strategies for different services such as construction and utilities.
2	Procurement Compliance	Finance, budget and documentation to ensure compliance and inter-departmental communication in decentralized organizations will be covered in this session.

Budgeting, Economics and Financial Planning

Rank	Session Title	Session Description	
1	Strategic & Financial Planning: Building Sustainable, Long-Term Government Budgets	A strategic vision means little without the financial framework to sustain it—and the ability to measure along the way. This session equips government finance professionals with the tools to align strategic glong-term fiscal planning and evaluate project effectiveness through meaningful metrics. Learn how multi-year financial forecast for governmental funds, integrate capital improvement planning and as economic impact of new development on the budget. Explore practical approaches to stakeholder enguineline development and defining performance indicators that support a unified roadmap for long-te sustainability.	
2	This practical session will walk participants through the essential components or sound financial policies including how to structure policies, define effective dates adoption. We'll also explore strategies for determining appropriate financial rese existing policies or starting from scratch, this session will provide actionable tools considerations for maintaining fiscal health and long-term sustainability.		
3	Bridging the Gap: A Budget Bootcamp for Finance Professionals (*Evolution Series)	This session offers a practical overview of the government budget process. Led by experts with cross-functional experience, it covers budget cycles, terminology and stakeholder roles—highlighting key differences and synergies between budgeting and finance. Attendees will learn how to better align budgeting with financial reporting, capital planning and operational performance.	
4	Rethinking Public Procurement: From Red Tape to Strategic Value	Procurement plays a critical role in public administration and public finance. When done effectively, it ensures compliance with laws and regulations, promotes operational efficiency, enhances transparency and access to competitive opportunities, strengthens risk management and fosters collaboration between government and suppliers. Despite its importance, procurement is often perceived as bureaucratic, slow and outdated. This session will address common myths, misconceptions and sources of frustration in the public procurement process. By exploring key procurement principles and real-world challenges, we'll uncover strategies to improve stakeholder satisfaction, strengthen the strategic value of procurement and drive better outcomes for public agencies.	
5	Economic Update	This session will explore key economic indicators such as GDP, inflation, interest rates, consumer confidence and employment figures and what they reveal about the broader economy. Participants will learn how to interpret these indicators and apply them in practical ways to enhance financial planning, budgeting and investment strategies. Understanding the economic landscape can help you anticipate changes, manage risk and identify opportunities. Stay ahead of the curve with insights that turn economic data into actionable guidance.	
6	Stewardship and Building Trust with Citizens: A Leadership Perspective (*Evolution Series)	In today's climate of heightened public scrutiny, government finance leaders must go beyond resource management to build public trust. This session examines how ethical leadership, transparent reporting and strategic communication enhance accountability and citizen confidence. Participants will learn best practices and real-world case studies to strengthen their role as trusted stewards of public resources and champions of civic engagement.	

Budgeting, Economics and Financial Planning

	Budgeting, Economics and Financial Planning			
Rank	nk Session Title Session Description			
7	From Budgets to Breakthroughs: Driving Results Through Collaboration (*Evolution Series)	Effective government requires more than managing budgets—it demands strong collaboration across departments. This session explores practical approaches to improve communication, coordinate initiatives and align resources within your organization. Learn how to build trust, streamline decision-making and work collectively to solve problems and achieve shared goals.		
8	Demystifying Grants: A Strategic Approach to Success	Grants are vital for government funding, but effective management goes beyond tracking dollars. This session offers practical strategies for finance professionals to enhance grant readiness, compliance and performance. Learn how to align organizational capacity, meet funding requirements and integrate grants into financial planning across the grant lifecycle. Ideal for both newcomers and experienced staff, this session will help strengthen oversight, reduce audit risk and maximize funding impact.		
9	TRIM Compliance: Insights and Lessons Learned	This panel offers government finance professionals a clear overview of the Truth in Millage (TRIM) process, featuring experts from property tax, local government and multi-county taxing authorities. Attendees will gain insights into millage calculations, compliance requirements and effective inter-agency coordination to ensure transparency and accuracy. Panelists will also share practical lessons learned from recent TRIM cycles, highlighting common challenges, successful strategies and best practices to help streamline future reporting and communication.		
10	Beyond the Crown: A Strategic Playbook for Achieving GFOA Excellence	Elevate your financial reporting and budgeting to award-winning levels. This session goes beyond the basic requirements to present a strategic playbook for achieving the prestigious GFOA Triple Crown Award and higher overall ratings. We will deconstruct the criteria for the Certificate of Achievement for Excellence in Financial Reporting (ACFR), the Popular Annual Financial Report (PAFR) and the Distinguished Budget Presentation Award, focusing on how leading governments integrate transparency, communication and innovation.		

Pre-Conference Leadership

Rank	Session Title	Session Description		
1	Zero Tolerance: Addressing Harassment and Bullying in the Workplace	The occurrence of bullying and harassment in the workplace has created the need for HR professionals to implement solutions before employee morale and organizational culture suffer. A panel will share their experiences and strategies to address this serious issue.		
2	"Elected Officials Are Our Friends" - Bruce the Shark	The synergy between city/county administrators and their elected officials is essential for the efficient delivery of services to residents. A panel consisting of administrators and elected officials will discuss their perspectives and strategies for establishing productive relationships.		
3	Walking the Tightrope - Work/Life Balance	A career in public service is demanding and it often seems impossible to make time for your spouse, children, exercise and life outside of work. A panel will share their viewpoints and how they've been able to achieve some work/life balance.		

Policy, Leadership, Strategic Planning and Personnel

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Rank	Session Title	Session Description		
1	Keynote Breakout 1	Breakout session for Keynote Speaker 1.		
2	Keynote Breakout 2	Breakout session for Keynote Speaker 2.		
3	The Journey (*Evolution Series)	The Current FGFOA Officers and Board of Directors will discuss their career progression and journeys.		
4	The Gift that Keeps on Giving - The Mentoring Series (*Evolution Series)	The most successful leaders were developed with the help of trusted individuals who provided them with the necessary wisdom and support. Come and learn how leaders for this session "pay it forward" and mentor the next generation.		
5	lgnite!	Come and hear from current FGFOA President Nicole Gasparri as she builds on the theme of her Presidency "Ignite"!		
6	"Yes, We Can" - Women in Leadership Series (*Evolution Series)	A panel of female leaders will discuss their own journeys, including the necessary skills and balancing acts, struggles and successes. They'll also share how to inspire and support other women and the next generation to do great things.		
7	Situational Ethics (*Evolution Series)	State and local governments establish codes of ethics that we must abide by however there are often times when we are faced with situations that don't have clear ethical solutions. Professionals will discuss specific case studies and their outcomes.		

Policy, Leadership, Strategic Planning and Personnel

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Rank	Session Title	Session Description		
8	The Secret Sauce for Organizational Success - Lean Six Sigma	How can the use of Lean Six Sigma principles lead to more efficient operations? The tone at the top is an important consideration. If leadership embraces the concepts, the rest of the organization will follow. Come and learn the concepts of Lean Six Sigma and the "culture" needed to make it successful. What started in the private sector has made its way to the public sector and it requires a culture of breaking down silos and working as a team.		
9	Legislative Update	This session will provide an overview of the 2026 Legislative Session, including a review of the bills that passed and failed and a discussion of their implications for local governments.		
10	Resilient by Design: Preparing for Tomorrow's Uncertainty"	There is only one constant and that is change. Since there are so many complex variables impacting the public sector simultaneously, budget/finance professionals are often expected to magically come up with workable solutions. This session will present strategies for keeping your organization resilient and adaptable.		
11	"We Want Talent and So Do You!"	Public service isn't typically the path people choose to become rich and famous. Therefore, attracting talent requires more than just offering competitive pay and benefits. Recruitment efforts must also appeal to people's sense of community and satisfaction that comes from serving others. This session will present best practices used by public sector managers and recruiters.		

Pre-Conference Investment

Rank	Session Title	Session Description	
1	"Extra, Extra," Hear All the Economic Updates!	Stay informed on the latest economic trends impacting state and local governments. This session provides an expert outlook on inflation, interest rates, employment, and fiscal policy developments that directly affects financial planning.	
2	Implementing a Strong Investment Program	Learn the fundamentals of building a robust investment program that balances yield, safety, and liquidity. Experts will share proven practices and tools for managing portfolios in today's interest rate environment.	
3	Liquidity Management and Cash Flow Forecasting	Accurate forecasting is critical for liquidity and operational success. Learn techniques and tools governments are using to forecast cash flow, optimize balances and ensure sufficient liquidity under varying economic conditions.	
4	Investment and Fiduciary Oversight of Defined Contribution or Pension Plans	Fiduciary oversight of Public sector retirement plans is more critical than ever. Explore best practices and regulatory expectations for managing defined contribution (DC) and pension plans. Gain insight into fiduciary responsibilities, monitoring investment performance and managing plan fees and service providers.	

Banking, Investment, Risk, Treasury Management and Debt Management

	Danking, investment, risk, freasury management and best management			
Rank	Rank Session Title Session Description			
1	Treasury Innovations in the Public Sector: Real-World Successes	Explore how public-sector entities are modernizing treasury operations through virtual credit card programs, ACH payments and fraud reduction strategies. This session highlights practical case studies, rebate opportunities and methods to reduce reliance on paper checks while strengthening financial security.		
2	"Let's Bond" Over Bonds, Notes and Beyond: Financing Capital Projects	Public agencies face multiple options when funding capital projects. This session examines bonds, bank loans, public-private partnerships and other alternatives—helping you compare structures and select the right approach for your organization's needs.		
3	The One Big Beautiful Bill: What It Means for Governments	Unpack the contents of recent legislation and its impact on government agencies. Explore how tariffs, Department of Justice provisions and other elements influence fiscal operations and compliance obligations.		
4	Risk Management in Treasury: Fraud, Cybersecurity, Physical Security and Internal Controls	From cyberattacks to operational vulnerabilities, treasury operations face growing risks. This session examines fraud prevention, cyber resilience, physical security and internal control measures to safeguard government finances in an evolving threat landscape. This session explores real-world examples to help increase strengths and reduce risks.		
5	Infrastructure Investment & Public-Private Partnerships (PPPs)	Explore the evolving landscape of infrastructure investment and the critical role of Public-Private Partnerships (PPPs) in delivering sustainable, large-scale infrastructure projects. Participants will gain insights into financing mechanisms, risk allocation, regulatory frameworks and successful case studies from around the world.		
6	Are you "Invested"?	Gain a clear overview of the principles, policies, and practices of municipal investment, including risk management, liquidity needs, and compliance with statutory regulations. Whether your municipality is managing reserves, planning capital projects, or seeking to maximize returns within a conservative framework, this session will provide the tools and insights needed to make informed, responsible investment decisions.		
7	Current Bond Market Conditions	A discussion on the bond market with updates on National and Local trends.		

Banking, Investment, Risk, Treasury Management and Debt Management

Rank	Session Title	Session Description
8	Understanding Arbitrage and Bond Compliance	Demystify the complex world of arbitrage calculation, payment and compliance. Participants will also explore how these requirements pair with ongoing bond compliance, continuing disclosure and best practices for staying audit-ready.
9	Rating Agency FAQ's & Updates (*Evolution Series)	All that local governments need to know to prepare for and begin a new rating process including suggested pertinent information to support the rating agency's review. Panelists will discuss credit attributes associated with higher rated entities and also factors that contribute to lower rating levels. Rating agency updates will also be discussed.
10	Self-Funded Health Plan Strategies & Considerations for Employers	This session will provide an overview of self-insured health insurance, program strategies to consider, best practices and important compliance requirements related to self-insured health plans.

Technology

Donk	Session Title Session Description		
Rank 1	Session Title Driving Efficiency and Controls through Hyperautomation	In today's fast-paced environment, local governments are leveraging hyperautomation to boost efficie strengthen internal controls and do more with less. This session explores how Al-driven analytics, pro automation, and cloud integration streamline operations, reduce manual tasks, minimize errors and imprompliance. Attendees will discover practical, real-world examples of automating routine processes; freein staff time and reducing costly mistakes. Whether new to automation or looking to expand its use, participant leave with actionable strategies to transform everyday operations and meet growing demands with lir resources.	
2	Harnessing Data Analytics to Detect Fraud and Anomalies	Data analytics offers a powerful approach to uncovering financial irregularities and enhancing compliance within government agencies. This session will demonstrate how to apply advanced analytic techniques to identify unusual patterns, detect potential fraud and flag compliance risks in public sector financial data. Attendees will gain practical strategies to create a proactive, data-driven control environment that strengthens oversight and mitigates risk. Through real-world government case studies and proven methodologies, participants will learn how to transform raw data into actionable insights, enabling faster detection and more effective prevention of fraud and anomalies in government operations.	
3	ERP Implementation Without the Headaches: Real -World Advice from Government Agencies (*Evolution Series)	Transitioning to a new ERP system presents unique challenges for government agencies, from managing stakeholder expectations to minimizing operational disruptions. This session delves into real-world experiences, highlighting proven strategies in change management, effective communication and risk mitigation. Attendees will walk away with practical insights and actionable best practices to ensure smoother, more successful ERP transitions within their own organizations. Additionally, the session will address how to leverage technology and collaboration to foster adoption and maximize the long-term value of ERP investments.	
4	It's Me vs. AI: Why Human Judgment Still Matters	Al tools like ChatGPT and Microsoft Co-pilot are powerful aids for analyzing data and generating reports, but they're not flawless. This session explores why Al should complement, not replace, human expertise, emphasizing the critical need for validation and oversight. Using practical examples like sales tax calculations, we'll discuss why fine-tuning Al outputs is essential before trusting them, and how human judgment remains irreplaceable in ensuring accuracy and reliability. Government professionals will gain insights on responsibly integrating Al into public sector workflows while maintaining transparency, accountability and compliance.	
5	Cybersecurity Risk & Social Engineering: Empowering Finance Teams to Navigate the Human Factor	This session examines the intersection of social engineering, technology and cybersecurity risk—focusing on the unique vulnerabilities within finance teams. Attendees will explore common attack tactics like phishing and baiting, and how emerging technologies can both expose and defend against these threats. The session highlights the critical role of finance professionals in managing cyber risks through internal controls, access reviews and vendor assessments, while emphasizing the importance of awareness, training and ethical tech use to build organizational resilience.	
6	Automating Year-End Close and Core Financial Processes for Greater Accuracy and Efficiency	Government finance teams face growing pressure to close the books quickly, accurately and in full compliance with reporting standards. This session explores how automation is transforming critical processes—such as journal entries, bank reconciliations, accounts payable and year-end reporting—by reducing manual effort, improving data accuracy and accelerating close cycles. Attendees will gain practical strategies and real-world insights on leveraging technology to streamline workflows, minimize errors and boost overall efficiency during the most demanding time of the fiscal year.	
7	Excel Tips & Tricks: Boost Your Productivity and Master Key Features	Unlock the full potential of Excel with practical tips and tricks designed to save you time and increase accuracy. This session covers powerful shortcuts, formulas, data visualization techniques and automation tools that can streamline your daily tasks. Whether you're a beginner or looking to sharpen your skills, you'll leave with actionable strategies to work smarter and more efficiently in Excel.	



FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC. 2025-2026 Educational Programs Committee Agenda Item # 1

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

BOARD LIAISON Stephen Timberlake

COMMITTEE CO-CHAIR
Katie Roundtree

STAFF LIAISON Karen Pastula Meeting Date: October 29, 2025

Title of Item: Educational & Webinar Committee Update

Executive Summary, Explanation or Background:

Delivered Webinars (Since August Board Meeting)

Two webinars have been delivered:

• Just-in-time Training

Date: August 14, 2025
 Registered: 714 Attended: 412

Understanding your Financial Statements

Date: September 25, 2025
 Registered: 702 | Attended: 405

Upcoming Webinars

The following sessions are scheduled for the remainder of 2025:

- Pension and OPEB Refresher November 20, 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.

Recommended Action:

For informational purposes only, no action is being requested

Wayne Meyer October 2, 2025

Wayne Meyer, Date Educational Programs Committee Chair



FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC. 2025-2026 Educational Programs Committee Agenda Item # 2

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

BOARD LIAISON Stephen Timberlake

COMMITTEE CO-CHAIR
Katie Roundtree

STAFF LIAISON Karen Pastula Meeting Date: October 29, 2026

Title of Item: 2026 Webinar Topics & Schedule

Executive Summary, Explanation or Background:

The committee held a Teams on August 14th to gather webinar ideas for 2026. As a result of that discussion, committee members subsequently submitted 21 webinar topics, which were vetted by the Committee. These exceeded what could reasonably fit into a single 12-month schedule, so the proposed plan includes select months with two webinars. A total of 17 speakers have been identified, with 4 topics pending speaker identification and 6 additional topics forwarded to the Conference Program Committee and the School of Governmental Finance (SOGF) Committee for consideration as part of their respective programming. Attached is the proposed webinar schedule for Board review and consideration. The Committee welcomes Board feedback and comments during the review process.

Attached is the proposed webinar schedule for Board review and consideration. The Committee welcomes Board feedback and comments during the review process.

Recommended Action:

Board review and approval of the proposed 2026 webinar schedule.

Wayne Meyer October 2, 2025

Wayne Meyer, Date Educational Programs Committee Chair

Month	Topic	Description	Speaker Identified	Submitted By
January	Compensated Absences (GASB 101)	How to interpret the new rules	Yes	Andrea Simon
February	ARPA Funds Wrap- Up	Ensuring compliance as ARPA closes out	No	Cory Brandt
March	RPA / Machine Learning	Using process intelligence to support CFOs	Yes	Wayne Meyer
April	Fraud / Data Analytics	Opportunities for fraud fighting and AI trends	Yes	Wayne Meyer
May	Privacy Protection Online	Best practices to protect data	Yes	Andrea Simon
2 nd Webinar	Arbitrage	_	No	Rebecca Hatz
June	Modernizing Municipal Finance	Compliance, Resilience, and Results with CPM	Yes	Stephen Emery
July	Artificial Intelligence	_	Yes	Stephen Emery
2 nd Webinar	SAS 145 / IT Control Findings	Common reporting deficiencies and lessons learned	Yes	Berri Davis
August	A Case Study of State Employee Theft	_	Yes	Wayne Meyer

Month	Topic	Description	Speaker Identified	Submitted By
September	Revisiting Pension & OPEB Disclosures	GASB Concepts Statement 3 implications	Yes	Dean Mead
October	Cyber Risks 2026 / PCI Readiness & Compliance / Ethical Hacking	A cybersecurity series	Yes	Rip Colvin
November	Review of GASB 87/96/101/103/104	Lessons learned from current GASB agenda	Yes	Berri Davis
December	Mitigating Audit Findings in Grants	Common findings in Single Audits and agency audits	Yes	Cory Brandt

Note: The 2026 webinar schedule is subject to adjustments. Alternate topics may be integrated as needed, and final sequencing may shift based on speaker availability, topic placement, or committee assignment. The Committee may also incorporate new or emerging topics in response to member needs and timely issues.

Alternate Topics

Topic	Description	Speaker Identified	Submitted By
Writing an Effective MD&A	Tips to make MD&A more useful	Yes	Dean Mead
Market Update	_	No	Rebecca Hatz
Single Audit / Uniform Guidance Update	_	Yes	Cory Brandt
Can You Hear Me Now? (GASB Feedback Strategies)	Influencing GASB standard-setting decisions	Yes	Dean Mead

Topics Forwarded to Conference Program Committee or SOGF

Topic	Description	Speaker Identified	Submitted By
Can You Hear Me Now? How to let the GASB know what you think	Influencing GASB standards	Yes	Dean Mead
Cybersecurity	_	Yes	Dean Mead
A&A Webinar	_	Yes	Rip Colvin
What is the Federal Reserve and Why Should We Care?	Overview of Fed's role	Yes	Datnilza Metz
10-Step Investment Management Process	Public funds management framework	Yes	Datnilza Metz
Single Audit / Uniform Guidance Update	_	Yes	Cory Brandt

^{*} Topics forwarded to the Conference Program Committee and the School of Governmental Finance (SOGF) Committee are provided for their consideration.



Florida Government Finance Officers Association, Inc. 2025-2026 Event Host Committee Agenda Item

2025-2026

CHAIRPERSON
Tammy Blake

SUB-CHAIR
Carlisha Jenkins

BOARD LIAISON
Allison Teslia

STAFF LIAISON

Jill Walker

Meeting Date: 10/29/2025

<u>Title of Item:</u> Committee Updates

Executive Summary, Explanation or Background:

The 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, here is an update for the host committee and upcoming plans.

2025 School of Governmental Finance:

Committee meetings were held with committee members regarding the hospitality suites and plans finalized. We will continue to work through this week with our final event being our Murder Mystery Night (It's a SOGF whodunnit!) on Thursday.

2026 FGFOA Annual Conference:

The conference is being held at the Loews Sapphire Falls Resort at Universal Orlando, with the Tuesday night event at Universal CityWalk Orlando. Our next meetings and future activities will focus on planning this event. Our committee members are energized and ready to get started on this project. Rip is currently working with Paul on finalizing the agreement for the Sunday morning TopGolf event (which includes breakfast and two hours of "golf").

Recommended Action:

None at this time.

Namo

10/29/2025

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

BOARD LIAISON

Kelly Strickland Nicole Gasparri

STAFF LIAISON

Jill Walker Karen Pastula Meeting Date: October 29, 2025

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

Executive Summary, Explanation or Background:

The Local Chapter Committee convened on October 13, 2025, with strong participation from committee members. The primary purpose of the meeting was to review the FGFOA and Local Chapter bylaws, discuss alignment and simplification efforts, and consider potential administrative structure improvements between FGFOA and its Local Chapters.

The committee revisited work initiated by last year's Bylaw Workgroup (Jamie Roberson, Nicole Gasparri, Wendy Khan, Diane Reichard, and Lorie Bailey Brown). Rip Colvin, serving as the FGFOA Ad Hoc Bylaws Chair, attended to provide perspective and ensure coordination between the state-level bylaw revisions and the Local Chapter Committee's recommendations.

Finally, Rip Colvin suggested exploring a formal Administrative Services Agreement between FGFOA and each Local Chapter. This document would clearly outline the responsibilities and expectations of both parties, improve operational transparency, and strengthen accountability. Committee members expressed support for developing this concept further.

Recommended Action:

Accept this report for informational purposes and request guidance from the FGFOA Board to explore the development of a formal Administrative Services Agreement between FGFOA and the Local Chapters.

Jamie Roberson, CGFO
Local Chapter Committee Chair



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

BOARD LIAISON

Kelly Strickland Nicole Gasparri

STAFF LIAISON

Jill Walker Karen Pastula Meeting Date: October 29, 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.

(J. Retrison)	10/17/2025	
Jamie Roberson, CGFO	Date	
Local Chapter Committee Chair		

From: Linsky, Edward - CCCA

To: First Coast Chapter; First Coast Active Members
Cc: Khan, Wendy - JEJE
Subject: Chapter Board Member Voting Opens 8/16/24
Date: Monday, August 12, 2024 5:26:06 PM
Attachments: First Coast Chapter Bylaws - 2024.pdf



Good afternoon First Coast Chapter.

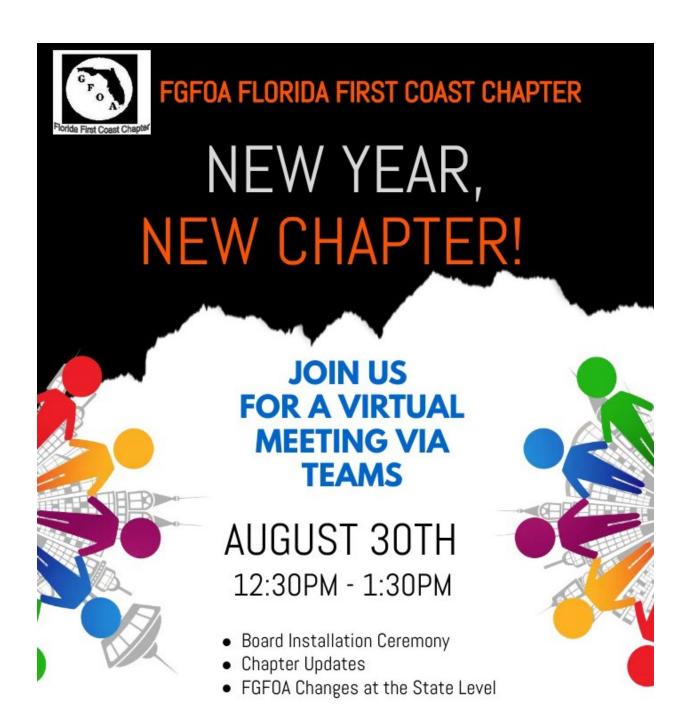
Voting for the FY 24/25 Board will open on 8/16/24. Active Chapter members will receive an email with a link to the online survey to vote. Below is the list of nominations. Also, attached is the proposed revised Chapter Bylaws that are up for consideration. Please contact Wendy Khan or me if you have any questions about voting. Upon completion of the voting period (8/16-8/23), we will be holding a virtual meeting on 8/30/24 to install the new board members, flyer below. Most importantly, the following is a list of the tentative chapter meeting dates for FY 24/25, so pencil in your calendar. We will provide additional details regarding the meetings at a later date. If your municipality is interested in hosting a meeting in your area, please contact me to discuss options.

Tentative FY 24/25 Meeting Dates:

- 10/4/24 CPE to be provided by PFM
- 1/10/25
- 3/21/25
- 6/20/25

Bord Nominations:

- Ed Linsky President
- Olga Rabel President Elect
- Wendy Khan Secretary
- Kathleen Collins Treasurer
- Melissa Burns Director
- Teresa Curtis Director
- Jose Regueiro Director



FREE TO PARTICIPANTS & OPEN TO ALL CURRENT AND PROSPECTIVE MEMBERS

Microsoft Teams Meeting Info

Meeting ID: 211 015 581 305 Passcode: 9mVRAZ

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Thank you

Acting Chapter President FGFOA Florida First Coast Chapter Edward E. Linsky, CPA City of Jacksonville Council Auditor's Office 904-255-5484

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From: <u>Linsky, Edward - CCCA</u>

To: Jamie Roberson

Subject: RE: Approved Chapter Board Meeting Minutes 7/10/24

Date: Thursday, August 29, 2024 8:44:26 AM

Attachments: image001.png image002.png

image002.png image003.png image004.png



Jamie,

We actually just had the Chapter vote on the proposed changes when we did the annual board voting. We know that the FGFOA is going to be making some changes in the near future but with Ms. Burns on our team, we are trying to get ahead of the curve.

Edward E. Linsky, CPA City of Jacksonville Council Auditor's Office Public Accounts Auditor 904-255-5484

"Please note that under Florida's very broad public records law, e-mail communications to and from city officials are subject to public disclosure."

From: Jamie Roberson < jroberson@martinclerk.com>

Sent: Thursday, August 29, 2024 8:38 AM **To:** Linsky, Edward - CCCA < ELinsky@coj.net>

Subject: RE: Approved Chapter Board Meeting Minutes 7/10/24

EXTERNAL EMAIL: This email originated from a non-COJ email address. Do not click any links or open any attachments unless you trust the sender and know the content is safe.

Ed,

This is awesome! Congratulations! My committee will be working on the drafting of language for every chapter's bylaws to incorporate the roles of the FGFOA with the partnership. It is great that you have already started the review process.

Thank you,

Jamie



Jamie Roberson, CGFO Chief Operating Officer of Finance 772.221.7414 | <u>iroberson@martinclerk.com</u>

Office of Carolyn Timmann Clerk of the Circuit Court & Comptroller 100 SE Ocean Blvd., Stuart, FL 34994





Tell us how we're doing by filling out a comment card!

<u>Please note:</u> Florida has a very broad public records law. Most written communications to or from local officials regarding official business are public records available to the public and media upon request. Therefore, your email communications, including your email address, may be subject to public disclosure.



From: Linsky, Edward - CCCA <ELinsky@coj.net> Sent: Wednesday, August 28, 2024 5:12 PM

To: First Coast Leadership <FirstCoastLeadership@coj365.onmicrosoft.com>; First Coast Chapter

 $<\!\!\!\text{FirstCoastChapter@coj365.onmicrosoft.com}\!\!>\!\!; First Coast Active Members <\!\!\!\text{FirstCoastActiveMembers@coj365.onmicrosoft.com}\!\!>\!\!\!>\!\!\!$

Subject: Approved Chapter Board Meeting Minutes 7/10/24

Please find attached the approved 7/10/24 Chapter Board Meeting Minutes.

The next Chapter Board Meeting has been scheduled for 9/18/24.

Thank you



Acting Chapter President

Edward E. Linsky, CPA City of Jacksonville Council Auditor's Office Public Accounts Auditor 904-255-5484

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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 Bylaws 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 1st and ending June 30th 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 <u>each Director</u> 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-Llaws 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-Llaws 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-Llaws of the FGFOA and this, of the Chapter, to the unexpired term.
- **Section 5.** The Nominating Committee shall make nominations to be presented at <u>or before</u> 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 15th 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 45-30 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 <u>fully and solelyonly</u> 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 <u>Career Professional</u> 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.

<u>ARTICLE XI – AMENDMENTS TO THE BY-LAWS</u>

Amendments to the Chapter By-Llaws 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 knowknown 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 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-Llaws. 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 XIIIV - 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-LLaws.



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 iroberson@martinclerk.com

BOARD LIAISON

Kelly Strickland Nicole Gasparri

STAFF LIAISON

Jill Walker Karen Pastula Meeting Date: October 29, 2025

Title of Item: Local Chapter Banking Transition

Executive Summary, Explanation or Background:

The **Local Chapter Banking Transition** continues to present challenges as the FGFOA migrates all Local Chapters to **Capital City Bank**. This transition impacts multiple administrative and financial processes, including officer and board member changes, online access to banking information, and the management of statements.

Key transition issues include:

- Officer and Board Transitions: Ensuring that new officers and board members have timely access to Capital City Bank systems following chapter elections or leadership changes.
- Access to Financial Records: Standardizing access to bank statements, P-Card statements, and account analysis reports for each chapter to support transparency and financial oversight.
- Bill Pay Notifications: Currently, bill pay notifications are being distributed to all chapters, which has created unnecessary duplication and confusion.
- Training Needs: A consistent training plan is required for all chapters receiving new
 credentials or system access to ensure compliance and understanding of Capital City
 Bank's online systems.

During the October 10, 2025 Local Chapter Presidents' call, it was decided that Paul and Josh would assume responsibility for distributing all monthly statements on behalf of every chapter. Going forward, all communications from Capital City Bank will be received exclusively by Paul and Josh, who will then forward the relevant information to the respective chapters. This change is intended to streamline communication, reduce confusion, and ensure consistent handling of chapter banking correspondence.

Recommended Action:

Accept this report for informational purposes and recommend the following actions:

1. Training and Coordination:

Paul and Josh shall coordinate and provide training for all individuals who have been issued new credentials to access Capital City Bank accounts on behalf of their Local Chapter.

2. Banking Updates:

Paul and Josh shall ensure all banking access changes are properly aligned with current Local Chapter officer and board member transitions.

3. Statement Distribution:

Paul and Josh shall ensure that monthly banking statements are distributed to each chapter on the same timeline as other monthly payables distributed by the FGFOA.

CXX Relierson	10/17/2025	
Jamie Roberson, CGFO	Date	
Local Chapter Committee Chair		



FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC. 2025-2026 Professional Development Committee Agenda Item

2025-2026 CHAIRPERSON Kadem V. Ramirez

Chief Financial Officer Village of Wellington 12300 Forest Hill Boulevard | Wellington, FL 33414 (561) 753-5267 kramirez@wellingtonfl.gov

BOARD LIAISON

Bil Spinelli

COMMITTEE CO-CHAIR
Bill Bowers

STAFF LIAISON Karen Pastula Meeting Date: October 29, 2026

Title of Item: Mentoring Program and Meetup Update

Executive Summary, Explanation or Background:

The FGFOA Mentoring Program is successfully underway, with the majority of mentors having connected with their assigned mentees. We are currently tracking the return of the final signed Mentor Program Agreements.

We were pleased to host our first Mentoring Meetup on Wednesday, October 15th. Darrel Thomas, Assistant City Manager/CFO for the City of Weston, presented on "Growing yourself and your Career through the FGFOA." The virtual event was highly successful, with approximately 40 members and participants joining the session to learn about the benefits of continued engagement and participation in the association.



Florida Government Finance Officers Association, Inc. 2025-2026 Technical and Legislative Resources Committee Agenda Item

2025-2026

Chair

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

Co-Chair

Derek Noonan Audit Manager Auditor General State of Florida 111 West Madison Street Rm 401-Q Tallahassee, FL 32399-1450 (850) 412-286

Board Liaison Nicole Jovanovski

Staff LiaisonJill Walker

Meeting Date: October 29, 2025

Title of Item: Overview of Committee Activities Through October 10, 2025

- A. The **2025** Legislative Summary Local Government Finance was posted on the Technical and Legislative Resources Committee webpage at FGFOA.org. Co-Chair Derek Noonan and Legislative Liaison, Ted Sauerbeck prepared it with assistance from volunteers.
- B. Government Resources Manual Subcommittee, chaired by Gabriela Molina prepared a revised draft of the **Basic Government Resource Manual**. It will be sent to TLRC members for feedback and then posted to the TLRC webpage.
- C. ListServe Subcommittee, chaired by Rebecca Schnirman held a series of meetings for potential vendors to demonstrate their products/services and answer questions.
- D. Liliya Sablukova agreed to co-present the Basic Government Resource Manual with Rip Colvin and Rebecca Schnirman at a class on "Working Smarter Not Harder Using FGFOA Resources" scheduled at the School of Government Finance on October 28.
- E. GASB Responses: We will respond when GASB documents are released. The next ones are an Exposure Draft on "Infrastructure Assets," an Exposure Draft on "Going Concern Uncertainties and Severe Financial Stress," and an Exposure Draft on "Revenue and Expense Recognition." We expect to receive these exposure drafts in 2026.

Recommended Action: None since this is for information only

Committee Chair: Ajay Gajjar,

Date: October 10, 2025



FLORIDA GOVERNMENT FINANCE OFFICERS ASSOCIATION, INC. 2025-2026 Communication Collaboration Sub- 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

STAFF LIAISON

Jill Walker Karen Pastula Meeting Date: October 29, 2026

Title of Item: ListServe Update

Executive Summary, Explanation or Background:

Attached is an update from the Sub-Committee researching options for an updated ListServe option.

Recommended Action:	
Rebecca Schnirman	October 18, 2025
Sub-Committee Chair	Date

	Category / Question	Higher Logic/Thrive Community	Forj acquired mobilize	Tradewing
Platform Overview				
	Fits FGFOA use cases & membership type	All-in-one engagement suite for associations combining Community + Marketing + Events + Learning; strong AMS/CRM integrations.	Community + Learning platform for associations/pro networks; combines Forj Connect (community) with Forj Learn/Journey. Notes: membership tiers currently set for pricing for courses. Future upgrade will add membership tiers to security.	Community & networking platform for associations; complements AMS with events, sponsor tools, and engagement.
Cost & Pricing				
	Pricing provided	\$2,625/mo SaaS (Community+Marketing+Jobs+Mento r); \$5,600 one-time implementation.	They will send by end of next week (10/3/2025)	Annual License: \$9,000 (up to 3,000 members) Integration (one-time): \$2,500 Implementation Fee (one-time): \$2,500 This brings the first-year total to \$14,000. We're also happy to extend multi-year savings. If FGFOA locks in a 3-year agreement, we can offer a 10% discount on the annual license fee, bringing it to \$8,100 per year. In that case, the first-year total would be \$13,100 with the one-time fees. Note: There may be an additional third-party integrator fee depending on final technical requirements. We're confirming this now and will share details as soon as we have them. (The totals above do not include any potential third-party integrator fees yet.)
	Pricing Methodology/Structure			pricing is based on number of active members. 6 weeks is ideal for integration especially to get integrations with IMIS. Works with 3rd party integrator and it's an annual fee.
Membership Integration				
	Integrates with FLCities/IMIS	Out-of-the-box iMIS integration; SSO; marketing write-back; robust AMS/CRM connectors.	Supports iMIS via bridges (e.g., ATS) for people/group sync & SSO; LMS bridge for course reg/completions.	iMIS integration via ATS Bridge (IQA-driven communities, contact sync, SSO). Uses 3rd party vendor for integration.
	Single Sign-On supported	YES	YES	YES
Discussion Forums				
	Threaded discussions	Threaded discussions, sub- communities, resource sharing, moderation; Al-driven Smart Newsletter.	Peer/group discussions, workflows, templates, moderation, targeted communication.	Discussions, interest-based groups, live/real-time engagement and messaging.
	Group/Topic subscriptions	Yes	Yes	can pull groups from IMIS

	Category / Question	Higher Logic/Thrive Community	Forj acquired mobilize	Tradewing
		Built-in Event Manager; registrations	Event creation, RSVPs, reminders;	Virtual, in-person, and hybrid events; registration; reporting. Video meet
		& payments; event communities	heritage from Mobilize for	feature is optional. Use Zoom and pricing is based on % of zoom
		before/during/after.	volunteer/event coordination. Event	expenses.
	Events		e-mail will auto send a calendar	
			notice. Has Zoom integration. Does	
			not have webinars yet. Feature	
			coming at end of calendar year.	
Document Library				
	Upload/download documents	Centralized resource libraries (docs/images/videos) with granular access controls.	Content hubs alongside community; social + formal learning tie-ins.	Curated, searchable libraries with filters/permissions.
	Search & tagging	uses Al for search	uses AI to scan for toxicity. And can ban specific words	does not use AI
	Version control			
	Storage Capacity	1TB	750MB limit on single file	
Communications				
	Built-in email tools		has some	
	Newsletter		none	
	Marketing	Full suite: segmentation, personalization, automated campaigns, engagement scoring, landing pages, deliverability team.	Intelligent workflows, automated onboarding, targeted comms (lighter than a full MAP).	Notifications, reminders; lighter automation compared to full MAPs.
User Experience				
	Mobile app or responsive site	Built-in shared app; optional Mobile 365 / Events apps.	Mobile experience/app for Connect & learning journeys. <i>Notes: yes included but extra for FGFOA branded app.</i>	Responsive/mobile app experience for discussions & events.
	Customizable look/feel	Microsites, nested communities, dashboards; design services available.	Branding, custom domains, configurable experience; unified community+learning UX.	Website Builder add-on for branded sites; template-based customization.
Admin & Moderation				
	Content moderation tools	auto-flagging of inappropriate content	yes. moderator can block or approve.	user driven and can report to admin. can put repeat offenders on moderation que and admin will approve and post it or reject it with comments. Can assign group moderators and admin per group.
	Customizable roles	configurable moderation levels and keyword triggers	community roles. Have badges to highlight who are experts or roles on certain items.	ai doesn't understand context and don't want to create ques for admin staff and think user generated moderation is most effective on platform.
Analytics & Reporting				
	Engagement tracking	Supports badges, reputation scoring, gamification, leaderboards.	roles; recognition for engagement.	
	Reports	Dozens of reports; engagement scoring; campaign & ROI analytics; trend analysis.	Custom analytics for participation, content, events; outcomes-focused reporting.	Member/content/event/sponsor analytics; MoM/YoY comparisons.
Security & Privacy				

	Category / Question	Higher Logic/Thrive Community	Forj acquired mobilize	Tradewing
	Security standards met	<u>Drata Trust Center Powered by Drata</u>		AWS. Redundancy and backups. Penetration testing. Haven't had any incidents in 5 years.
	Member data protection			
Support & Training				
	Onboarding/training included	Advisor-led onboarding; Academy;	Partnership-focused onboarding & success	Available upon request
	Ongoing support	Super Forum; 95%+ CSAT; SLAs published.	modern documentation/resources.	Onboarding specialist; average ~15-minute response from support team.
	Dedicated account rep			
Success Stories				
	Peer examples provided	IBM. California League of Cities	N/A	North Carolina CPA chapter; a lot of medical and health associations; trade organizations
	Measurable results shared			
Scalability				
	Scales with growth			
	No user/feature limits			
	Archive (can we archive content)			
Optional Features				
	Jobs board option	Jobs board stream for non-dues revenue		
	Polling/Survey	Polls + full survey module (logic, reporting, real-time results).	Polls in group feeds/emails; no advanced survey module.	Polls as engagement tools; no advanced surveys.
	Sponsor/Revenue	Jobs board; microsites; mobile events sponsorship; resource promotion.	LMS only: Monetize content/courses; sponsorship via community/learning programs. Does not have paid sponsorship feature.	Sponsor landing pages, tiers, CTAs, analytics for ROI.
	Other Features	Mentor Match module; volunteer manager	Learning & certification via Forj Learn; community-driven learning journeys.	Sponsor visibility & member networking; no dedicated mentoring module noted.

From: <u>Jack Stapleton</u>

Sent: Friday, October 3, 2025 4:05 PM

To: Rebecca Schnirman

Subject: RE: [EXT] RE: Higher Logic Partnership Proposal & Demo Recording

Attachments: FGFOA HL Draft Agreement 10.3.2025.pdf

This Message Is From an External Sender

This message came from outside your organization.

Hi Rebecca,

Sure thing! Please see the updated draft agreement, included as an attachment.

Here are a few additional community case studies with measurable results/analytics below:

ASAE – A Masterclass in Community [us-71739.email-composer-webhooks.gong.io]

- ASAE has used Higher Logic since 2011 (<u>ASAE Collaborate</u> [collaborate.asaecenter.org]) to support their mission and provide exceptional member experiences. The community facilitates almost everything they do (email marketing and newsletters, discussing industry best practices and ongoing engagement, volunteer management, mentorship program, group collaboration, ongoing training and education, committee collaboration, events, job opportunities, member retention) and drives member engagement across multiple programs.
- In reviewing their data, ASAE saw:
 - Members who renewed had over 50% more community activities than members who did not renew.
 - Members with at least 1 community activity per month generate 5x more revenue than users with fewer activities per month.
 - Users who attended the annual event had over **6 times more community activities** than users who did not attend the annual event.

ASQ Successfully relaunches with migration to Higher Logic Thrive [higherlogic.com]

- Here's <u>ASQ's story of their successful migration from their previous community app to Thrive [higherlogic.com]</u>, which showcases measurable gains in engagement and adoption after launching Thrive. ASQ's previous community platform and listserv provider had poor UX and limited engagement. ASQ Migrated to Higher Logic Thrive in 2023 to successfully relaunch their community.
 - The Results
 - 9× increase in monthly discussion threads (from 16 to 145).
 - 40% increase in monthly logins (from 4.5K to 6.4K).

 40.61% open rate on community email digests—well above benchmarks.

<u>Destinations International Gets 55% More Engagement with Higher Logic Thrive Community [us-71739.email-composer-webhooks.gong.io]</u>

- Through a combination of strategic design, personalization, resource-rich engagement, Destinations International has transformed their member experience into a high-performing digital community with Higher Logic Thrive. They've not only seen impressive engagement gains—they've laid a foundation for ongoing innovation, member value, and global impact.
- "After implementing the changes to the online community, the engagement points skyrocketed... all of this growth is completely organic from using Higher Logic Thrive Community."

-Joanna Hammond, Marketing & Communications Manager

- The Results after launching Thrive
 - 55% increase in engaged users
 - 27% increase in engagement from non-staff contributors
 - Improved email performance on open and click-through rates to significantly above industry benchmarks.

MTI Harnessed Higher Logic To Digitally Transform [us-71739.webhooks.gong.io]

- "I would highly recommend Higher Logic as a private social community. We love that we have 100% control of how the system is used and can create different communities on the fly for different needs. Our entire membership committee process, as well as other committee work, is handled through their own forums. There is also a robust resource library area to store all documents members can have access to. Our community is almost like an employee for us." Tom Morrison, President of MTI
- The Results:
 - 2600% revenue growth in 14 years
 - 97% member retention rate
 - 50% decrease in transactional requests due to community

<u>More Engagement with Less Effort for Engineers Australia's Community [us-71739.email-composer-webhooks.gong.io]</u>

- Engineers Australia needed a secure, central online space for members to connect, collaborate, and share resources. Previously, members were fragmented across multiple platforms—LinkedIn groups, Teams chats, emails, WhatsApp—making engagement, moderation, member verification, and resource management inefficient and risky.
- Engineers Australia implemented Higher Logic Thrive to launch the <u>EA Exchange</u>, [eaxchange.engineersaustralia.org.au] consolidating all their communities and member segments into one secure, easy-to-manage platform.
- Key Outcomes
 - **15x Increase in Monthly Discussions**. Community discussions grew from 10–20/month to 150–200/month following the launch of EA Exchange.

- **3x Growth in Community Size.** Membership in EA Exchange tripled from 5.1k at launch to over 15.7k active users.
- 113 Active Communities & Daily Content Creation. Members contribute new content daily across 113 sub-communities.

Also wanted to reshare this iMIS case study as well - <u>IPWEA Optimized Their System and Grew Membership [us-71739.email-composer-webhooks.gong.io]</u>

- With just a 3 person team, IPWEA transformed with Higher Logic powering their online community, email marketing, website, and events.
- "Higher Logic Community is so flexible and easy to use" said Catherine Eloreine,
 IPWEA's Senior IT Systems Officer. The integration between Higher Logic and our
 database, iMIS, works seamlessly. It allows us to set up single sign-on and
 registration for events on our Higher Logic sites that go directly into iMIS, making
 it easier for our staff and creating a cohesive experience for our members."
- IPWEA achieved a **25% surge in new member prospects** and an **11% net membership increase**, plus re-engaged lapsed regional members, all thanks to Higher Logic's engaging online community tools.

I also wanted to see if you had 15 minutes this coming week or the next to connect with our original founder and CRO, Mark Lowry. Mark is very close with the folks at iMIS and I was filling him in on the status of the project. He is excited to connect about the potential partnership, and this will be great time to discuss any questions that came out of today's committee meeting, questions about the pricing, draft agreement, etc., before your upcoming board meeting. There is daylight on Mark's calendar for Friday the 10th at 9am. Does this time work on your end? If not, no worries, just let me know so we can line something up!

We have an absolute home run here and I'm looking forward to further discussions.

Jack Stapleton

Account Executive

c. 703.975.7119 | e. jstapleton@higherlogic.com



From: Rebecca Schnirman < RSchnirman@pbc.gov>

Sent: Friday, October 3, 2025 2:16 PM

To: Jack Stapleton < jstapleton@higherlogic.com >

Subject: [EXT] RE: Higher Logic Partnership Proposal & Demo Recording

Jack,

Would it be possible to quote us without the Marketing module? I wasn't sure if that was required to move to the Higher Logic Thrive Community platform. Also,

would you be able to send us some more analytics samples for the community platform?

Thanks,

Becky

From: Jack Stapleton < jstapleton@higherlogic.com >

Sent: Tuesday, September 9, 2025 3:44 PM

To: Idbenoit@pinellas.gov; Rebecca Schnirman < RSchnirman@pbc.gov>

Subject: Higher Logic Partnership Proposal & Demo Recording

Hi Linda and Rebecca,

Thanks for joining today for our demo. I enjoyed reconnecting, and am excited to say we have an absolute home run here!

Here are the key points we discussed during the meeting:

- The transition from your current listservs to a modern, robust community platform for improved communication, resource sharing, and engagement.
- The benefits of a seamless bi-directional integration with iMIS for operational efficiency, personalized member experiences, and comprehensive data synchronization.
- The platform's extensive features, including advanced AI capabilities for content creation and search, integrated marketing tools, and opportunities for non-dues revenue generation through sponsorships.

As promised, I have included our detailed partnership proposal for you and your team.

<u>Link to Demo Recording [us-71739.email-composer-webhooks.gong.io]</u>

Looking forward to hearing how your Board meeting goes on October 29th! Do not hesitate to reach out if there is anything we can help with around this meeting or if there are any questions that come up in the meantime.

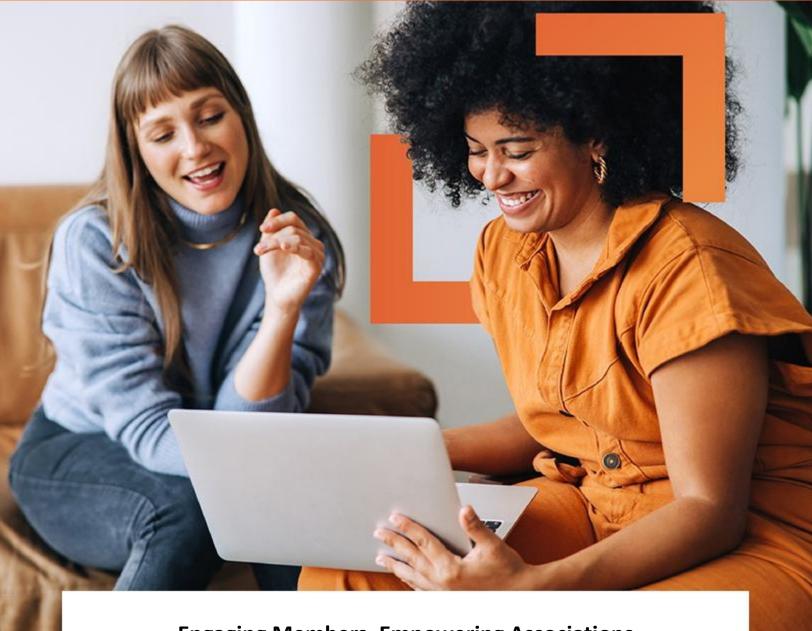
We have a genuinely perfect strategic fit here, and super excited about this potential partnership we are fostering with your association!

Jack

Jack Stapleton

Account Executive c. 703.975.7119 | e. jstapleton@higherlogic.com [us-71739.email-composer-webhooks.gong.io]

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Engaging Members, Empowering Associations
Higher Logic Thrive Proposal Prepared for:



September 9, 2025



Rebecca Schnirman
Director of Finance & Support Services, Palm Beach County Parks
Florida Government Finance Officers Association
P.O. Box 10270
Tallahassee, Florida 32302

Dear Rebecca,

Thank you for considering Higher Logic as your platform and partner for your Online Community and Marketing. We're thrilled to join you on your association's journey toward achieving your goals and contributing to your future success. As a Higher Logic user, you'll be in excellent company alongside more than 3,000 organizations, including The League of California Cities and The American Society of Association Executives.

With your Higher Logic solution, you'll gain the tools and confidence to:

- Transform member engagement through dynamic discussion forums, moderated conversations, and resource sharing that go far beyond the limitations of a traditional listserv.
- Streamline operations and data management by integrating seamlessly with your iMIS AMS—eliminating manual processes and consolidating member insights in one unified platform.
- Elevate professional development with a modernized mentoring program, targeted email campaigns, and scalable content libraries that support learning, leadership, and career growth.
- Understand Member Needs: Use data-driven insights to tailor offerings and enhance their experience.

We are pleased to present this proposal, which outlines your investment, inclusions, and other essential details.

At Higher Logic, we value your business and your team. Our commitment to your success extends far beyond a successful implementation—we strive to establish a lasting, productive partnership for the future.

Should you have any questions or require further customization, please don't hesitate to contact me.

Sincerely,

Jack Stapleton, Account Executive 703-975-7119 jstapleton@HigherLogic.com www.HigherLogic.com

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1 Why Higher Logic

Who We Are

Higher Logic is revolutionizing the way associations and member-based organizations create meaningful connections. With nearly two decades of experience, we've redefined engagement by unifying community, marketing, learning, events, and more—empowering organizations to deliver deeply personalized, impactful experiences across every member touchpoint. The focus is not just on connecting organizations with their members but also on nurturing an ecosystem where members can connect. This dual approach has proven to be a winning strategy, as evidenced by the growth to over 3,000 customers globally.

The company's commitment to creating unique and original experiences is evident in our data-driven, cloud-based engagement platforms. These tools are designed to support organizations at every interaction point, from the first website visit to continuous membership renewal. Higher Logic's comprehensive suite of engagement and communication tools enables organizations to track and manage member interactions effectively, ensuring a seamless member experience.

At the heart of Higher Logic's philosophy is the belief that a strong community is the foundation for success. By providing a space where members can interact, share ideas, and ask questions, Higher Logic helps organizations worldwide to transform their members into champions. This transformation is not just about engagement; it's about driving revenue and elevating the organization's influence. In essence, Higher Logic is dedicated to turning interactions into lasting relationships and tangible success.



About Higher Logic Thrive

Higher Logic Thrive connects the dots between your community, marketing, learning, events, and data—helping you deliver the kind of personalized, engaging experiences today's members expect. By breaking down silos and centralizing insights, we empower associations to not only understand member behavior, but to act on it—whether that means sending the right message at the right time, fostering peer-to-peer connections, or surfacing relevant content automatically.



With Higher Logic Thrive, you're not just managing communications, you're building a living, breathing ecosystem of engagement. One where every interaction is informed by data, every experience feels tailored, and every member touchpoint works together to drive retention, growth, and loyalty. That's the Higher Logic difference: turning fragmented interactions into a unified engagement strategy that transforms members into champions of your organization.

2 FGFOA Solution Overview

Member engagement is at the heart of what we do. Higher Logic Thrive helps members realize organizational value, driving success for your association in support of your overall mission.

- #1 Association Community Software: Drive deep engagement by creating a space for your members to connect anytime, anywhere—on the online platform, via email, or in the app.
- Powerful Marketing and Communications Software: Automated campaigns or one-off emails reach your members' inboxes with the right message at the right time.
- A suite of add-on products supports your growth to drive deeper member engagement.
- Out-of-the-box integrations with iMIS.
- Implementation, management, training, and support, ensuring a successful launch and long-term success.
- Major focus on Accessibility and Security (SOC2, GDPR, ISO 27001).

This section contains the recommended Higher Logic solutions and related services for FGFOA. Its common for Higher Logic clients to start with the Higher Logic Thrive features that support their most important goals first and grow into add-on products over time.

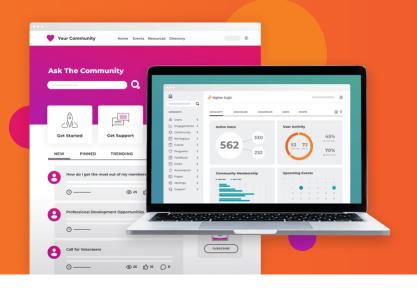
Based on our conversations and our experience with similar organizations, we recommend Higher Logic Thrive Platform, which are detailed below. Add-on products and optional services for future consideration are listed in the Appendices.

Higher Logic Thrive lets us streamline the member experience and our members love it — that's what matters most.

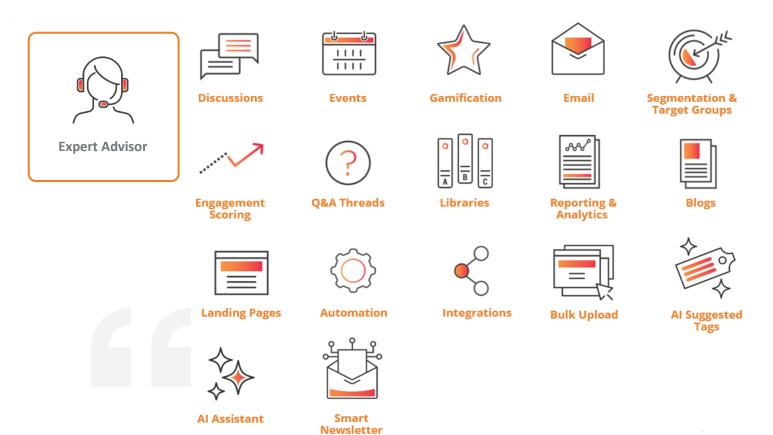
MONICA ESCOBAR

Senior Manager, Member Engagement ASIS International





Higher Logic Thrive Platform Summary



Getting to where it's a one-stop-shop – like Higher Logic Thrive offers – and working within that one platform that has everything is so much better and easier for us. And it makes a more streamlined experience for our members.

JOEY MARTELLI

Advocacy and Public Affairs Manager Society of Health and Physical Educators (SHAPE) America

Higher Logic Thrive Community

A vibrant online community is at the foundation of a successful association. It powers member engagement while also making your staff more efficient, leading to better member experiences and a higher return on your investment.

Connecting Through Community

The heart of a Higher Logic community lies in its ability to connect individuals from diverse backgrounds and geographies in a dedicated, branded virtual space. This digital ecosystem fosters collaboration and engagement, allowing members to post answers, share content, and provide product feedback. By integrating a community platform with a Customer Relationship Management (CRM) or Association Management System (AMS), associations gain a 360-degree view of member interactions. This integration is crucial for tracking activity, capturing trends, and collecting business intelligence that informs strategic decisions.

Personalization: A Tailored Approach

Personalization is the cornerstone of a successful community. By leveraging microsites, robust nesting structures, and targeted messaging, associations can deliver a customized experience to each member. Rules-based automation and best practices enable content tailoring based on individual community activities, ensuring that each interaction is relevant and meaningful. This level of personalization enhances the member experience and reinforces the value of the association in the eyes of its members.

Analytics and Automation

Through a combination of actionable analytics and automation capabilities, Higher Logic clients can guide their members through a variety of membership journeys based on preferences and interests. These journeys begin at initial onboarding and continue through the lifecycle of their membership.

Build Member Advocates

The community space encourages users to connect with new members, fostering a culture of learning and growth. For associations, this creates an environment where brand advocates are readily identifiable, making it easier to leverage their influence when needed.

Why Are Communities Important?

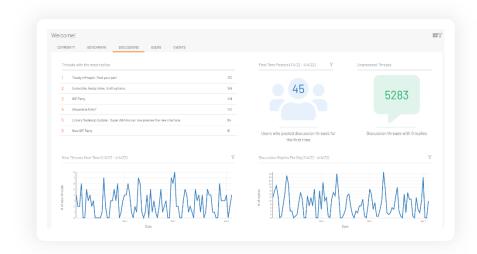
Creating a thriving online community for an association involves fostering an environment where members feel valued and engaged. This can be achieved by implementing a multi-faceted approach that includes recognizing and celebrating diversity, facilitating meaningful interactions, and providing resources that cater to the varied needs and interests of the members.

Key strategies include personalized communication, interactive webinars, and targeted discussion groups that encourage active participation. Additionally, offering a mix of educational content, industry news, and opportunities for professional development can help maintain the community's relevance and appeal. By leveraging technology to streamline collaboration and sharing, associations can create a dynamic space that not only supports learning and growth but also enhances the sense of belonging among members. Ultimately, the success of an online community hinges on its ability to adapt to its members' evolving needs while upholding the association's core values and objectives.

comemueniety (noun)

A group sharing common characteristics or interest and perceived or perceiving itself as distinct in some respect from the larger society from which it exists.

(Source: Merriam-Webster Dictionary)



Analytics

Analyze member activity, whether it's group activity, community content, or product feedback.

Dozens of ready-made reports are available to track user activity, identify trends, recognize contributions, and more.

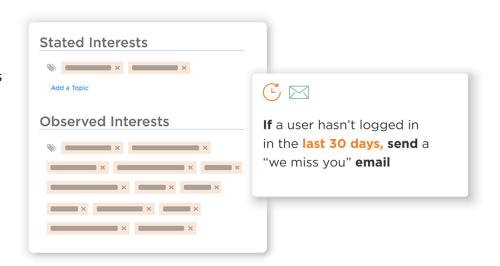
Gain insight so you can refine your offerings and reinforce membership value.

Automation

Rule-based automation targets users based on their community activities.

Built-in rules drive community success using nearly two decades of best practices.

Keeps members engaged with less handholding.



One of the most valuable tools for me is the automation rules, which let me set up logic-based rules to activate messages to specific sectors of the community. I save a lot of time using these to make members more aware of their benefits, and I've received a lot of appreciation from our members.

MONICA ESCOBAR

Senior Manager, Member Engagement
ASIS International

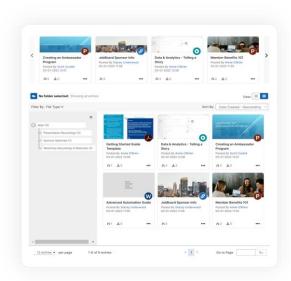
Events

An integrated calendar lets members find relevant events within their community.

Support events before, during, and after with dedicated event communities where you can place resources and content to build excitement or keep up the momentum.

Accept event registrations and payment processing through integrations with PayPal, CyberSource, and Stripe.





Resource Libraries

Make your most valuable resources easy to find!

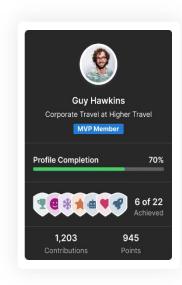
Organize, house, and share your resources, including documents, images, videos, and more.

Easily control access with sub-communities and security groups.

Higher Logic Thrive has helped us reduce clicks for our members and make it easy for them to get to the sections of our community they care about. It gives members a nice home base where they can access everything they want.

MOLLY HAUBER

Manager of Membership, Alliance of Community Health Plans



Gamification

Powerful community motivators like reward ribbons, badges, and a community user leader board encourage participation.

Callouts in daily digests and notifications keep users on track.

Mobile App

Reach your members where they are with our built-in shared mobile app where your community users can:

- Browse the feed for the latest content
- Filter and search for specific topics
- Create one-on-one connections
- View and RSVP to events
- Manage their profile





AI-driven Smart Newsletter

Deliver an individually tailored newsletter to your community members.

Smart Newsletters leverage machine learning to build a profile of each recipient based on their activity.

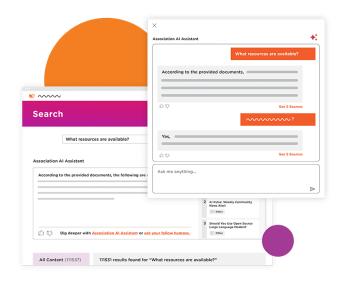
The more interaction, the smarter and more tailored the newsletter gets to the interests of each individual member.

AI Search Assistant

The **AI Assistant** enhances your existing Higher Logic Thrive Community search and knowledge sharing by combining a LLM (large language model) with your community's content for meaningful answers.

If the member's question isn't answered, they can "ask the humans" using an AI drafted discussion post based on their question, demonstrating that your organization is the go-to in the industry.

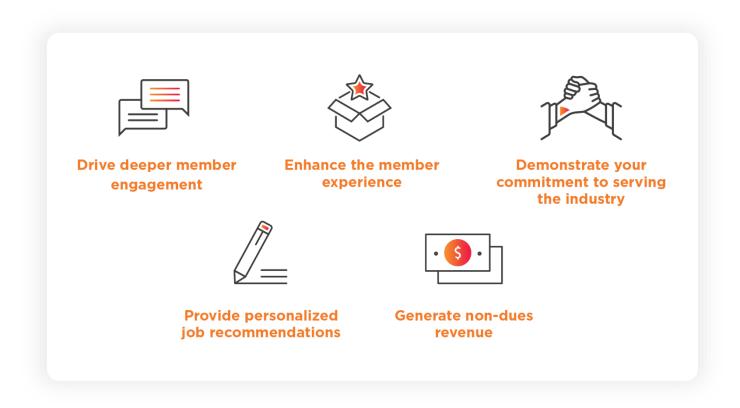
The combination of AI, association proprietary content, and industry-specific human experts make your association even more valuable.



Higher Logic Thrive Jobs

Keep your members happy and engaged while simultaneously creating a fresh stream of non-dues revenue and a promising pipeline of prospective members with Higher Logic Thrive Jobs.

- Further facilitate your members' career development while strengthening engagement
- Stream relevant career opportunities into the feed of your community
- Create a powerful one-stop-shop using your Higher Logic Thrive Jobs Board



Higher Logic Thrive Marketing

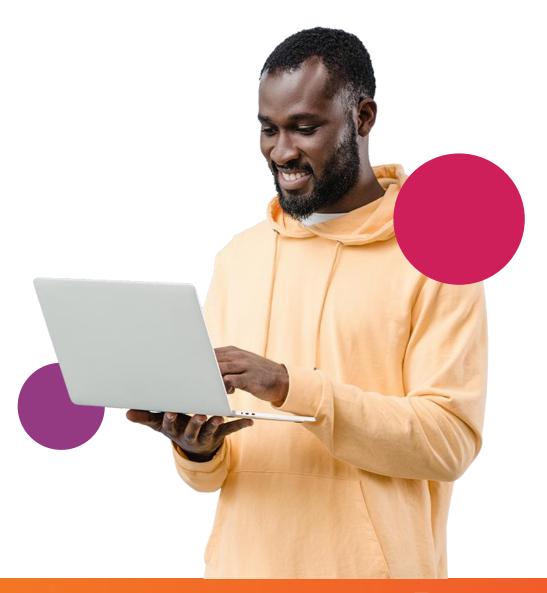
Build lasting relationships with your members through email marketing automation. Deliver personalized content and targeted communications that will keep your members coming back for more.

Integration with CRM and AMS Systems

The integration of email marketing automation with Customer Relationship Management (CRM) or Association Management Systems (AMS) is a game-changer, with many integrations allowing for a dynamic exchange of information. Distinguish between engaged and non-engaged members, track interest areas, monitor engagement scores, and analyze website page visits to ensure that every communication feels personal and informed by up-to-date insights into customer behavior.

Engaging Your Audience with Precision

By leveraging data-driven insights, you can refine your messaging to better align with your audience's interests and behaviors. Engagement scoring is a particularly effective strategy for maintaining a connection with your current members. It enables you to identify those who are not actively engaging and reach out to rekindle their interest. This proactive approach ensures that no member feels neglected and helps in building a community around your brand.



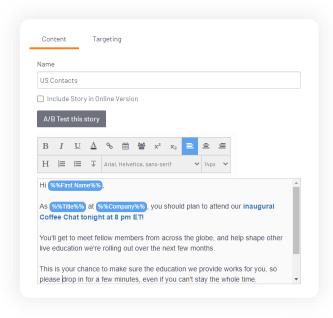
Segmentation

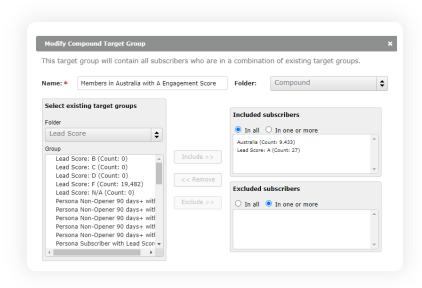
Reach the right member with the right message at the right time using robust segmentation capability.

Tailor every email or automated campaign with dynamic content, segmentation, and personalization.

Built-in segmentation helps you get started right away.

Integrations with your AMS or online community make adding lists a breeze.





Personalization

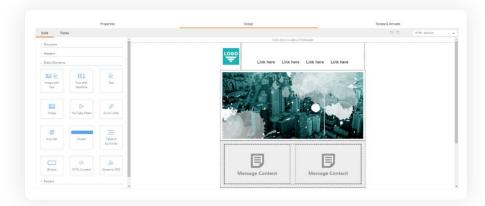
Customize mailings with demographic and personal information so that members receive messages that feel tailored just to them.

Integrations with your AMS or online community make adding personalization a breeze.

Templates

Get started quickly with prebuilt templates or build one from scratch using our template designer or theme builder.

Test templates using a virtual inbox and apply changes to templates currently in use.





Industry-Leading Deliverability

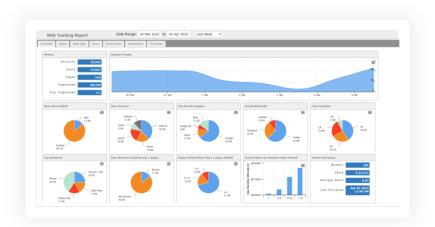
Our dedicated team will work with you to establish best practices, including IP warming, sender authentication, inbox preferences, and more.

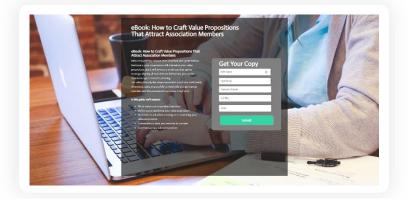
Web Tracking

Understand exactly how members are engaging using activity data that can be reflected on their member records.

Use insights gained from user activity to better understand how to deliver value from membership.

Set up automated campaigns triggered by web activity – or inactivity.





Landing Pages

Easily customize an unlimited number of landing pages – no HTML knowledge required.

Use landing pages for content marketing, lead capture forms, unsubscribe pages, and more.



We're really excited to use email data analytics – especially as we monitor engagement post-pandemic. Being able to see who's reading things and who's opened things will be really useful as we plan our communication strategy.

TONI FANELLI

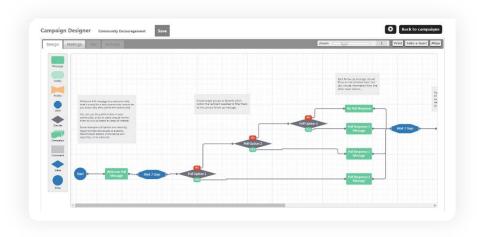
Associate Director of Operations and Governance Alliance of Community Health Plans

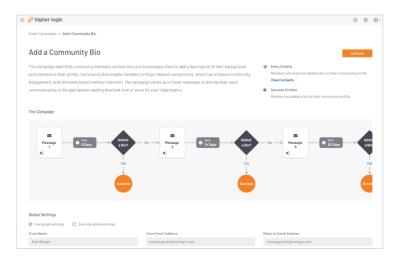
Automated Campaigns

Based on nearly two decades of association experience, easy-to-use marketing automation campaign templates come preloaded.

Campaigns can be easily built from scratch based on your needs.

Set campaigns to trigger based on user actions.





Smart Campaigns

Smart campaigns allow association staff to effortlessly maintain accurate member records by bringing community data automatically into your outreach efforts, intelligently idetifying which members qualify for campaigns that encourage action.

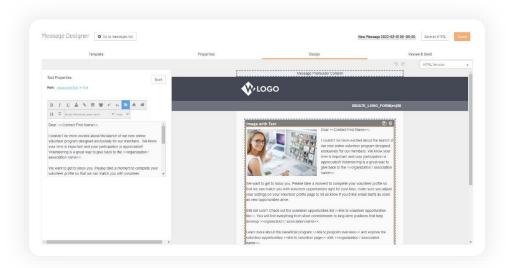
A series of data-driven, Al-generate emails.

Target new members or long-standing members to take a specific action, such as updating profile information, posting to the community, or reengaging.

One-off emails

Send the right message to the right member at the right time with no limits.

Drive subscribers to take action or simply share the latest industry news.





Engagement Scoring

Use engagement scoring to identify members who may be at risk of not renewing.

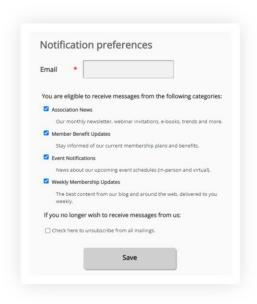
Message Categories

Reduce the likelihood of unsubscribes from your organization's communications.

Members and prospects self-select the categories they are interested in.

Ensure your contacts get only the emails they want to drive engagement with your content.

Drill down into reporting based on categories to understand how your messages are performing.





Reporting

Leverage robust reporting tools to track effectiveness and prove ROI.

Measure impact across marketing channels, including individual emails, marketing automation campaigns, and landing pages.

Mentor Match

Support your members' professional development needs with Mentor Match integrated into your community.

Mentor Match allows program participants to define their mentoring value, topics, and level of commitment. Participants also can keep track of activity and monitor relationships. After a participant has set up their mentor/mentee profile, they are added to the mentoring directory. Mentors/Mentees can then connect with each other by searching for industry-specific demographics and initiating a mentor or mentee request. The recipient is emailed a notification with the link to the respective mentor/mentee profile to assess the match. If the mentor/mentee accepts the request, they are removed from the pool of available mentors.

Expand your mentoring program further by creating a mentoring community where you can create a library of career and education-focused resources—webinars, articles, and sample resumes—to help participants gain the experience they desire.

Mentor Match also comes with a variety of activity and engagement reports to help you accurately measure the effectiveness of your mentoring program.

Mentor Match: At a Glance

- Set up a mentor/mentee profile to add to the mentoring directory
- Search for industry-specific demographics and initiate a mentor or mentee request
- Receive an email when an appropriate mentor/mentee match is found
- Accept the mentor/mentee request and automatically become removed from the mentor/mentee pool

Mentor Match: Advantages

- Mentoring program integrated with Member Profiles
- Users opt-in and establish available dates
- Unlimited points used as a basis for matching mentors and mentees
- Reporting for Admins
- Dashboard for participants
- Ribbons and badges for participants

Services+

Power up your Higher Logic Thrive investment with a dedicated expert to help you get things done - fast.

Harness Higher Logic Thrive's innovation with an industry expert who specializes in helping associations achieve their goals!

Unlocking Services+ Benefits

- Strategic Guidance: Craft the ultimate member experience with expert advice and strategic direction.
- Efficient Staff Allocation: Free up staff time to concentrate on critical priorities and overarching initiatives.
- Resource Amplification: Gain additional support without increasing payroll costs.
- Accelerate ROI: Services+ swiftly maximizes the return on your Higher Logic investment.

Services+ Menu by Solution

Thrive Platform + https://www.higherlogic.com/thrive-platform-plus-menu/

3 Implementation and Support

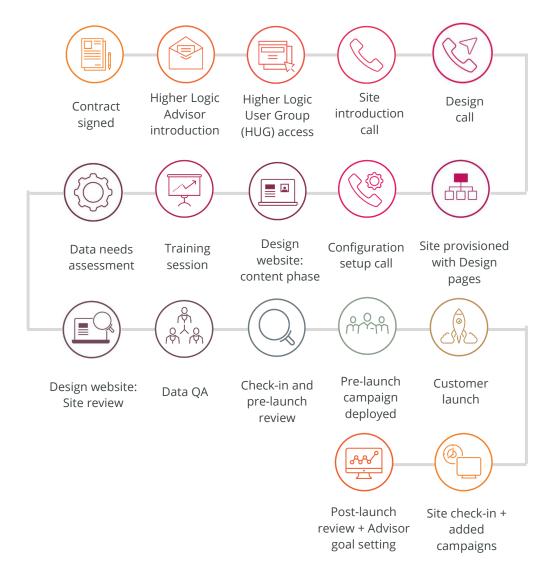
Path to Success

Based on our work with thousands of association clients, Higher Logic has established a methodical and proven process to ensure every new client will build and grow a successful online community.

As a new customer, we introduce you to your Advisor, who will lead the process of learning about your organization's needs and goals for your new community. Your Advisor walks through how to use the products, modules, and apps that are part of your Higher Logic solution. They'll work closely with you to answer questions, troubleshooting, and successfully launch your community (typically 60-90 days for Thrive Community projects).

Customer Journey (sample)

The Higher Logic implementation team will guide you through the launch process with an interactive, step-by-step project plan tailored to your association. We understand the importance of achieving and sustaining success.



^{*}This sample journey includes optional design services

Technical Information

Security and Privacy

Higher Logic supports information security management standards and regulatory compliance frameworks, which are assured by annual audits. These complementary practices work together to offer customers assurance of information security and data privacy.









ISO/IEC 27001:2013 is an internationally recognized standard for information security. Certification is granted to organizations satisfying a three-stage audit process.

SOC 2 Type 2 audits are conducted by Certified Public Accountants and are the most commonly accepted audit framework for evaluating external service organizations. A Type 2 report is the product of an evaluation of the operation of an organization's controls over a specified time period.

AMS Integration

A key distinguishing feature of Higher Logic lies in its seamless integration capabilities. Specifically, robust connections with some of the most widely used Customer Relationship Management (CRM) and Association Management Systems (AMS) platforms. Through robust web services and API-based integrations, your existing relationship management system becomes the central hub for user data. Any modifications or updates made to user records within your CRM or AMS are effortlessly synchronized with your community, ensuring a cohesive and efficient experience for both staff and members.

Single Sign-On (SSO)

Higher Logic offers a powerful feature that allows users to access both the association membership website and the community seamlessly using a Single Sign-On (SSO). With SSO, users log in once and gain access to both platforms without the hassle of repeated log-ins. This integration ensures a transparent experience for end users, eliminating any sense of leaving the organization's home site. Whether interacting with the community or exploring membership resources, users can navigate effortlessly while maintaining a cohesive connection.

Software as a Service (SaaS)

Higher Logic, a true Software as a Service (SaaS) solution, resides entirely in the cloud, with data securely stored and backed up. The advantages of partnering with a SaaS provider are compelling for associations and their members.

Cost Efficiency: By entrusting Higher Logic with software development, upgrades, connectivity, and maintenance, associations can focus their IT budget on strategic advantages. Say goodbye to hardware installations, software upgrades, and internal IT upkeep. Instead, allocate resources to an ongoing monthly expense, avoiding large one-time capital outlays. Higher Logic liberates associations from high IT costs, allowing them to channel time and funds toward membercentric initiatives.

Continuous Enhancements: Higher Logic actively monitors how customers engage with our applications. This collective insight serves as a valuable feedback loop, driving ongoing improvements in usability, performance, and functionality. As your community evolves, so does Higher Logic, ensuring a dynamic and responsive experience for all users.

Education and Training

Any online community is a dynamic ecosystem, constantly evolving with new community managers, product updates, and cutting-edge engagement strategies. At Higher Logic, we recognize the importance of continuous learning and support. That's why we offer a wealth of opportunities for education, training, and product assistance:

- Training (Live): Instructor-led training sessions are provided regularly and are broken into easily digestible pieces.
 Gone are the days of sitting through multi-day training sessions. Our focused sessions allow students to practice hands-on exercises and reinforce their learning.
- Webinars: Dive into specific topics related to Community and Marketing through short, live webinars hosted by our seasoned instructors. Stay informed and up to date with the latest insights.
- On-Demand Learning: Access a library of on-demand videos covering everything from the basics to advanced content. Learn at your own pace, 24/7. Need guidance? Follow our recommended learning paths for a structured journey.
- Knowledge Base: Our easy-to-navigate product documentation library complements other Higher Logic learning resources. With robust search capabilities and intuitive navigation, finding the content you need is a breeze.



Higher Logic Academy

Our courses cater to a diverse audience, including clients in the implementation phase, newcomers to Higher Logic, and those seeking additional support to elevate their community engagement or marketing automation efforts. Whether you're just starting out or aiming for advanced proficiency, we've got you covered!



Higher Logic Super Forum

Join us as we bring together professionals from diverse industries, all eager to harness the transformative power of engagement. Our mission is to enhance customer experiences, fortify retention, and foster unwavering brand loyalty.

- Premier Thought Leadership: Immerse yourself in the wisdom of fellow customers and industry experts. Discover best practices that propel success.
- Personalized Consulting Sessions: Engage in dedicated face-to-face consultations with our seasoned experts. Tailored guidance awaits.
- Exclusive Insights: Our leadership team unveils behind-the-scenes product presentations, providing you with exclusive glimpses into our vision and innovations.

Support

Our mission at Higher Logic is to create an exceptional customer experience. We provide the support you need to achieve your business objectives and maximize the value of your Higher Logic solutions. As you embark on your journey, rest assured that we offer a range of resources to assist you.

Support Center Knowledge Base: Our easy-to-navigate product documentation library complements other Higher Logic learning offerings. With a robust search feature and intuitive in-article navigation, finding the content you need is a breeze.

Call, Email, or use our Ticketing System: Should you encounter any challenges beyond what the tools can address, our ticketing system is at your service. Create a case, and our experts will promptly address your questions or issues.

- Our overall customer support satisfaction scores at 95%+
- Our median first response time (from a person) is 4 to 5 hours
- Our median time to resolution for tickets is less than 2 days (<48 hours)
- Our % of tickets solved in our first contact is 50%+



Higher Logic Users Group (HUG)

Connect with an active community of professionals just like you. Share knowledge, ideas, and inspiration to improve your organization and member experience.

4 Investment

Recommended Solution

SaaS Fees

Higher Logic Thrive Product and Add-Ons	Monthly SaaS Fees (Invoiced Annually)
 Higher Logic Thrive Platform Plus Community (Discussions and Libraries, Member Directory, Event Manager, 	\$2,425
Automation Rules, Gamification, Mobile App, Profiles, AI-driven Smart Newsletter)	
 Marketing (Segmentation, Personalization, Templates, Deliverability Team, Web Tracking, Landing Pages, Pre-Built Automated Campaigns, Engagement 	
Scoring, Reporting & Analytics)	
Integration with iMISExpert Advisor	
Higher Logic Thrive Jobs	Included
Mentor Match	\$200
Total Monthly SaaS Fees	\$2,625

Higher Logic Thrive SaaS fees are inclusive of licensing, hosting, support, maintenance, lifetime upgrades, and training.

One-Time Fees

Services	One-Time Fees
Higher Logic Thrive Solution Implementation	\$5,600
Includes discovery, onboarding, configuration, data validation, and product launch.	

^{*}All pricing valid for 60 days

5 Appendix A – Additional Products and Add-ons

Higher Logic Thrive Learn

Powered by Blue Sky eLearn

Create a personalized learner journey that helps your members achieve their goals with an award-winning learning management system built into your Higher Logic Thrive Community.

Achieve your education program goals

Increase awareness and drive interest by tailoring education suggestions based on what you know about your user from their community profile and activity.

Deepen community engagement and membership value

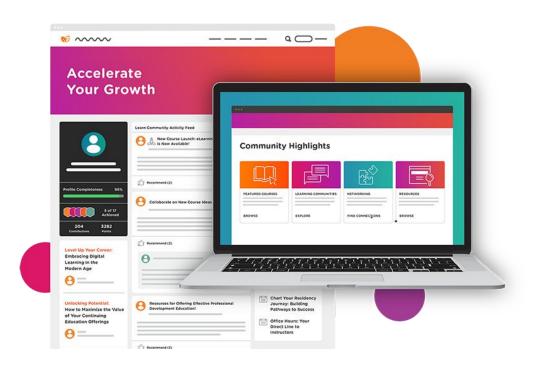
Stream personalized suggestions into the community feed and leverage automated campaigns to keep learners on track. Deliver a more personalized experience, proven to positively impact member engagement, recruitment and retention.

Improved user and administrative experience

Manage and design custom learning programs with a convenient drag-and-drop interface. Content type options meet varying learning styles via a responsive and intuitive experience on any device — creating an all-around improved experience.

Diversify your revenue stream

Generate a new source of non-dues revenue by selling your educational content. Accept payments and apply coupon codes or discounts right through the platform.



Higher Logic Thrive Submissions and Review

Streamline submissions and simplify reviews. Manage entries and speed up the evaluation process. Leverage your Higher Logic Thrive Community data to enhance engagement for the following programs: Abstracts, Awards, Grants, Scholarships, and Fellowships.

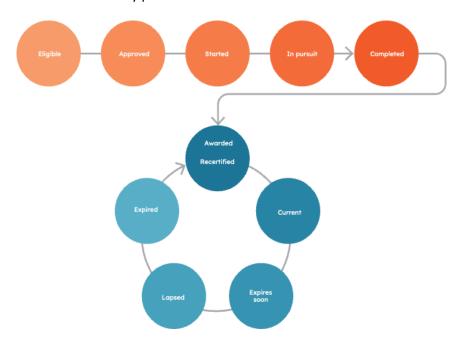
- Empower staff with insights at their fingertips. Based on community conversations, past behavior, and stated and implied interests, learn who to invite for awards, calls for proposals, and more.
- Guarantee complete submissions with easily configured workflows. No more incomplete applications or manual tracking!
- Increase participation and make the process easier for applicants using pre-filled data from your member's Community profile.

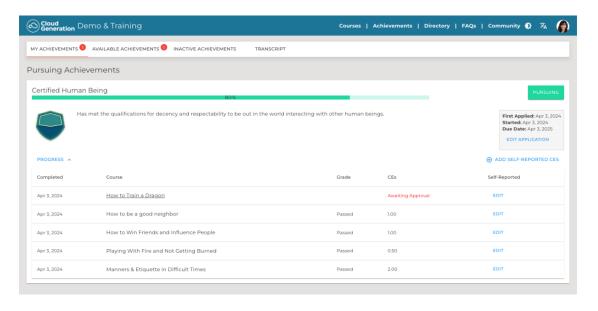


Higher Logic Thrive Credentialing

Powered by Cloud Generation, create operational efficiency with an end-to-end solution that allows your association to build automated and personalized pathways for learning. Give your learners what they need, when they need it, with personalized journeys and progressive disclosure. As If by magic, complex programs seem as easy as 1-2-3.

- Deliver personalized learning- at scale- to ensure members achieve their certification.
- Keep members on track with reminders and notifications in the Higher Logic Community feed- reaching members where they are.
- Easily assemble credential validation with a searchable directory, plus data-backed digital badges that seamlessly appear on your members' community profile.





Higher Logic Thrive Mobile 365

Higher Logic encompasses a multi-channel approach to member interaction that fully leverages mobile communication. Mobile apps are easy to set up and distribute. The mobile app offering works on multiple mobile devices, including iOS and Android devices. By incorporating mobile technology into your social media strategy, you will have a much greater likelihood of gaining visibility for your social media initiatives.

Higher Logic Thrive Mobile 365 is an award-winning dedicated community mobile app that delivers year-round mobile engagement through communications, content, connections & events:





- Personal Experiences Deliver tailored alerts & personalized content & facilitate networking opportunities
- All-in-One Event Platform Deliver & support all of your in-person virtual & on-demand events
- Revenue & ROI Generate revenue through app sponsorships, ad spaces, push notifications, exhibitor lead scanning, and more
- Full Control Manage your app branding, menus, content, users & security settings from any device

Thrive 365 enables you to:

- Deliver timely, mobile-accessible content to members
- Demonstrate value of membership
- · Communicate more effectively
- Engage younger/diverse members
- Engage members both during & outside of events
- Respond to the most recent posts and check direct messages



Higher Logic Thrive Mobile Events

Higher Logic Thrive Mobile Events is an events-only app that enhances the attendee experience at in-person and virtual conferences, tradeshows, and meetings – anywherre around the globe.

Offering a configurable look and feel to align with your event branding, Higher Logic integrates with your tech stack to eliminate data silos. With many opportunites for driving non-dues revenue amongst exhibitors and sponsos, Higher Logic Thrive Mobile Events eliminates the need for multiple applications.

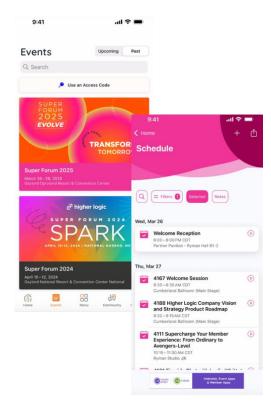
- Personal Experiences Deliver tailored alerts & personalized content & facilitate networking opportunities
- All-in-One Event Platform Deliver & support all of your in-person virtual & on-demand events
- Revenue & ROI Generate revenue through app sponsorships, ad spaces, push notifications, exhibitor lead scanning, and more
- Full Control Manage your app branding, menus, content, users & security settings from any device

Thrive Mobile Events enables you to:

- Provide a personalized, schedule-building experience
- Access to attendee, speaker, and exhibitor/ sponsor information
- Connect attendees through a digital business card exchange
- Engage event attendees through gamification
- Drive non-dues revenue with exhibitor lead scanning & selfservice portal
- Keep everyone up to date with push notifications

Thrive Mobile Events: Standard Integration Support

Note: Thrive Mobile Events is built on the Engagefully Events app by Results Direct. Standard integration support details can be found here.

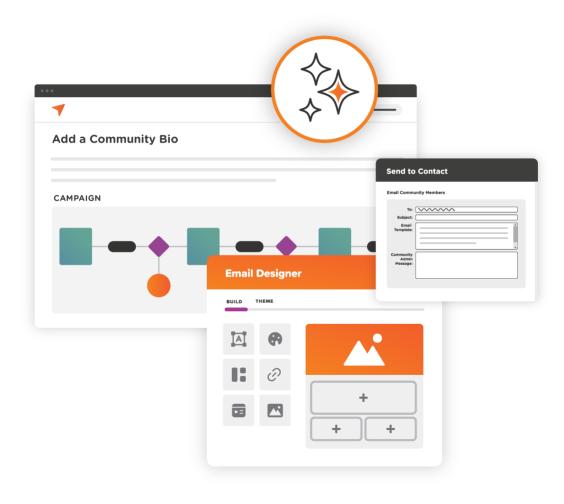


Higher Logic Thrive Communications

Higher Logic Thrive Communications helps empower your association to demonstrate member value, deepen engagement, improve data accuracy, and reduce staff burden—without needing to tap in your marketing department.

With more than 30 automated Smart Campaigns, we identify the members who need a nudge to engage in the Community through a series of pre-written and automated emails focused around that one goal. Smart Campaigns also allow association staff to effortlessly maintain accurate member records. They work by intelligently identifying which members qualify for campaigns that encourage action.

Higher Logic Thrive Communications also enables membership/community managers to cut through the silos that stand between them and their community members, making it possible to send one-to-many emails that are beautifully designed and provide full analytics and reporting.



Component Management

Our component managent solution includes Microsites, Nested Communities, and Group Manager. This suite of products gives member groups their own personalized space in your community.

Dedicated Experiences for Every Customer Segment

With the Component Management expansion pack, you can effortlessly create microsites tailored to your members' needs. These microsites facilitate networking, resource sharing, and dedicated communities for chapters, councils, and special events. Customize the design to match your association's branding, and choose between distinct microsites or template-based sites. Maintain centralized control or delegate authority to super admins.

Drive Engagement with Sub-Communities

Unlimited, hierarchical sub-communities within a robust nesting structure empower your team to efficiently manage diverse groups with varying permissions. Each microsite can host an unlimited number of dedicated communities or sub-communities, serving as collaboration spaces for regional chapters and interest groups. Engage members before events, facilitate ongoing discussions, and archive resources afterward. Additionally, create private, secure groups like the board of directors. With Higher Logic Thrive's technology integrations, automate group assignments based on demographics and control access by defining viewing and joining permissions.

Empower Group Leaders

Empower your group or chapter leaders to take ownership of their sections while maintaining association boundaries. Provide them with targeted reporting and communication abilities specific to their groups. By organizing permissions by group, you avoid compromising overall security and control by creating additional super admins.



Microsites

Many organizations have Special Interest Groups (SIGs), Chapters, Committees, and Regional Groups, often referred to as components. Microsites enable each component or group to manage its own web presence while retaining a cohesive look with the overall design ideology of the organization. The benefits of Microsites are realized immediately. Our easy-to-use website wizard gives components the power of web innovation while preserving the integrity of organizational logos and branding. Additionally, Microsites present organizations with an innovative opportunity to generate a significant non-dues revenue stream by offering advertising and banner opportunities within their component websites.

Higher Logic also provides the ideal platform for an organizational Intranet. It's fully customizable, easy to use, and directly integrates with your CRM/ERP system. Best of all, there is no need for additional IT hardware or internal support, making it the most cost-effective solution for your association.

Microsites: At a Glance

- Consistent "look and feel" for all organizational sites
- Intuitive content management tools
- Built-in website tracking and analytics, including web traffic, page views and unique visitor demographics
- Integrate with your organization's AMS/CRM/database or the centralized chapter/component/SIG database platform
- Improve search engine optimization, increasing non-member traffic and association exposure

Microsites: Advantages

- Multiple/unlimited websites—associated with Communities or free-standing
- Page and partial-page access permissions and security
- Gradations of admin levels to allow universal management rights or editing privileges for specific communities/websites
- User dashboards for determining display of content, privacy settings
- Dozens of tiered statistics and reports available online and via exported CSV files
- API for external display of microsite content
- RSS enabled

Nested Communities

Unlocking Layers of Community: Associations and businesses often operate within multi-tiered structures, including leadership hierarchies, committees, sub-committees, and diverse product lines. Similarly, online communities adopt a strategic 'layering' approach when establishing communities and sub-communities—for instance, national and regional chapters.

Nested Communities empower you to structure your communities precisely to match your organization's unique 'layered' framework. Plus, with a dedicated management page, maintaining organization across these various 'layers' becomes effortless.

Nested Community

A nested community is any community site that is hierarchically situated below another community.

Group Manager

Group Manager unlocks powerful community functionality:

- **Enhanced Community Email Features**: Create unlimited email templates and define data sources to precisely target specific community members who meet specific requirements.
- Customizable Community Dashboard: Each community can set up a personalized dashboard, tracking the most critical community metrics.
- Community Slideshow Widget: This widget showcases community highlights with pictures—perfect for events, meetings, volunteer opportunities, and more.
- Community Ad Builder Widget: Empower Community Admins to display ads within their communities.
- **Community Polls**: Community Admins can add polls created by Super Admins to their community homepages. They can also remove polls and generate reports on poll results.

Volunteer Manager

Volunteer Manager encourages volunteerism at all levels using an intuitive system that makes it easy to find, track and reward member engagement. Let your member community be the engagement platform for your volunteer outreach and opportunities. Drive member involvement in organization, component, personal and industry levels, while streamlining your volunteer engagement process and reward/recognition system.

Volunteer Manager: At a Glance

- Encourage member engagement with better rewards and recognition programs
- Streamline volunteer process with an automated and easy to use system
- Track engagement with a point system that measures offline volunteer efforts

Volunteer Manager: Advantages

- Configure volunteer opportunities to exact specifications
- Post volunteer openings in a searchable online database
- Automatically notify members looking for volunteer openings
- Accept or decline volunteers who indicate that they're interested
- Enable staff to grant "volunteer administrator" status to specific volunteer leaders

No other system makes it easier to find volunteers – or for volunteers to find a suitable opportunity. Volunteer Manager allows organization leaders to grant "volunteer administrator" status to individual members, allowing them to post their own openings in the volunteer database. A host of configuration tools allow administrators to tailor the opportunity to their exact specifications.

Workspace

Workspace seamlessly merges community engagement with robust historical decision-tracking. By integrating community features with structured document management, task tracking, and project tools, Workspace breaks down collaboration silos. It unifies everything into a single system, promoting transparency, accountability, and efficient information sharing.

Collaborate without worry when you have Workspace:

- Track crucial details with long-term project management
- Record why and when decisions were made
- Increase transparency and traceability for mission-critical projects
- Establish a durable system of record for important group projects

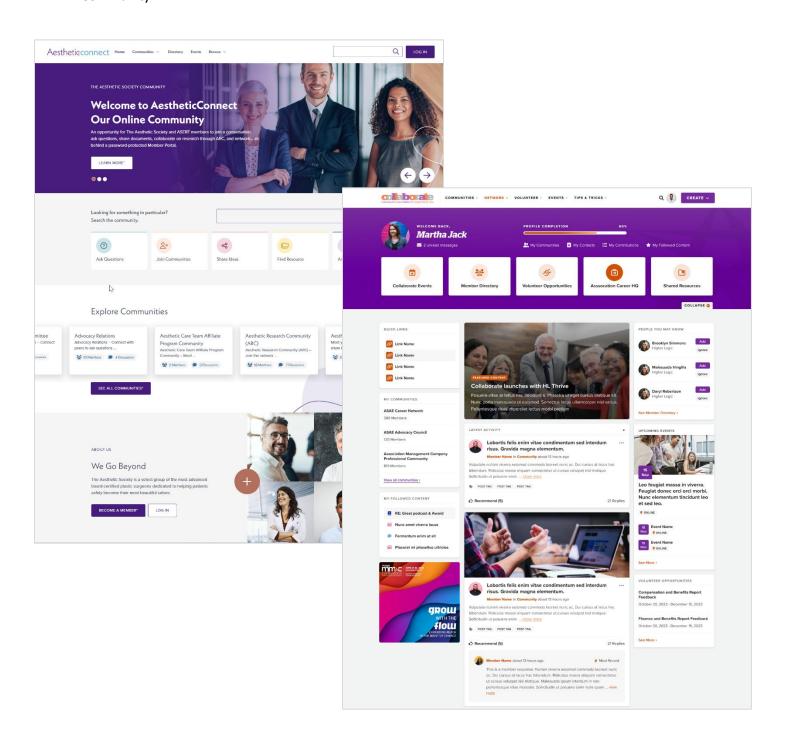
Where Workspace can help your org:

- Long-standing committee work
- Standards or process development
- Approval processes for technical documents
- Technical output, academic input

Community Branding

This package offers a comprehensive suite of tools to enhance online engagement and experiences surrounding your community. The services include configurable design, personalized and modern interfaces, and year-round design support.

- Make your Community your own with a configurable design solution that compliments your website branding
- Get expert guidance in design and design management of your Community, including ongoing maintenance
- Create a visually stunning and cohesive experience as your members navigate from your website to your
 Community

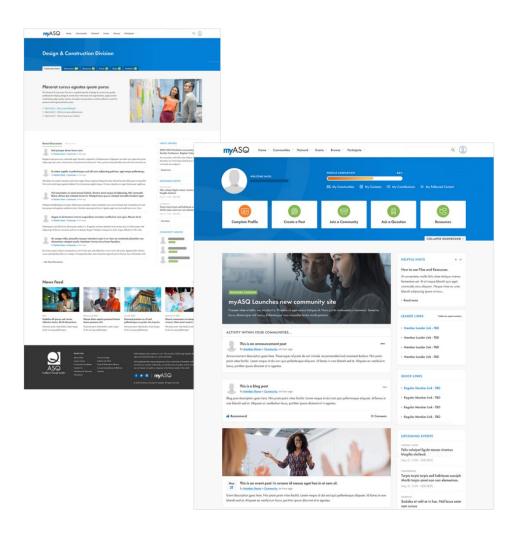


Community Design

This package allows you to integrate your custom branding into your Higher Logic Thrive Community with mockups of public and member homepages and branded sticker sheets to use on your site. Experienced web designers will personalize your Higher Logic Thrive Community by applying your branding to key elements like navigation, headers, banners, fonts, colors, buttons, and footers.

Included in Community Design:

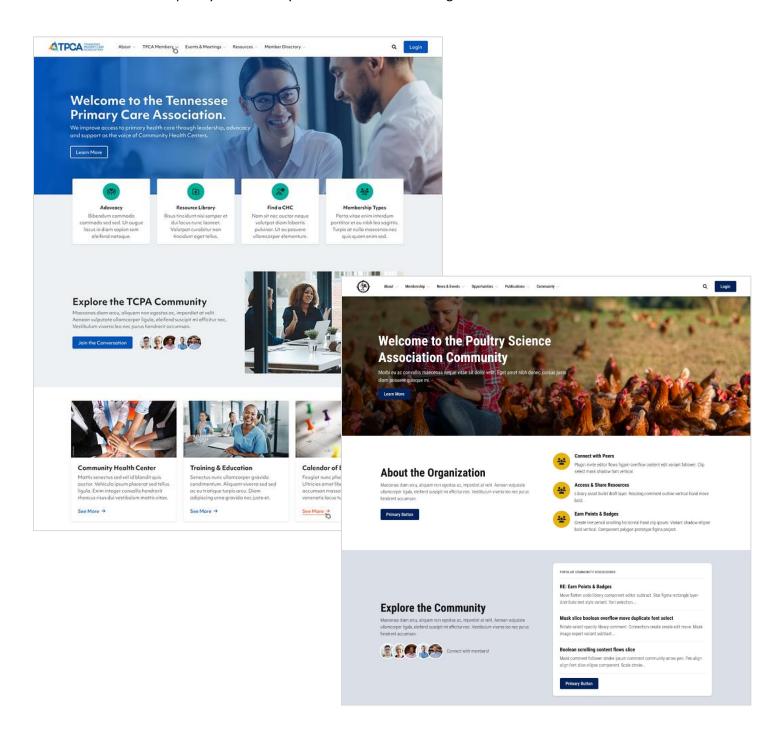
- Homepage Mockups: Our designers will create a mockup of your public and member homepages.
- Sticker Sheet: Branded, reusable web components to help build and update pages.
- Design Add-On Points: Choose to spend points on various things that are important to your organization's community, like functionality tweaks, assistance, migrating more content, or even adding new custom design features.
- Training: Learning how to maintain your community website,
- Ongoing Design Support: Access to Design Services for support and updates.



Website Design Suite

The Website Design Suite combines expert guidance with a reimagined online presence, streamlining your tech stack and saving valuable staff time.

- Capture the attention of your audience with a reimagined online presence
- Get expert guidance in strategy, design, launch, and management of your website with ongoing maintenance
- Create a "one-stop-shop" with a single destination for website content and your community
- Consolidate your Higher Logic solutions into one easy-to-manage bundle
- Reduce the complexity and cost of your tech stack while saving valuable staff time

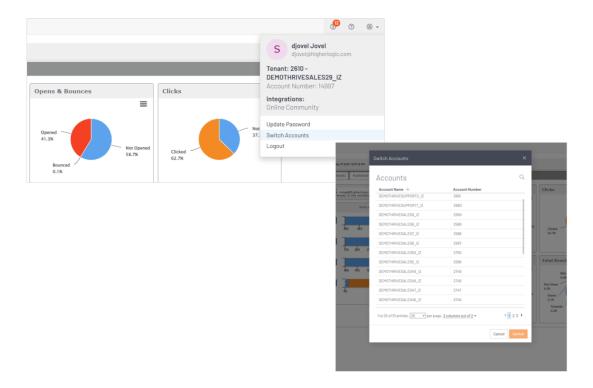


Marketing Child Account

A child account is a sub-account of a main Higher Logic Thrive Marketing Professional account. Child accounts are a good way for a large organization to segment its smaller units and allow admins to have separate accounts for smaller units of their larger account.

This enables a Higher Logic Thrive Marketing customer to, for example:

- Provide child accounts with branded email options so that their messages reflect their unique information (e.g., regional office address and phone number).
- See and manage membership data that is unique to their child account which makes the data easier to manage on a "local" level, but have it still be accessible to the main account admins.



6 Appendix B – Optional Services

Services Platinum

Are you ready to elevate your engagement to new heights? Look no further than Higher Logic Thrive Platinum Services! Our comprehensive suite of strategic services is designed to empower your organization, foster meaningful connections, and drive success.

Higher Logic Thrive Community Platinum is more than just a package—it's your passport to a thriving digital community. Here's what you need to know:

- Strategic Services: We've curated a set of powerful services that go beyond the ordinary. From community management to marketing automation, we've got you covered.
- Personalized Advisor: Say hello to your dedicated Higher Logic Advisor. They'll be your guide, collaborator, and confidant throughout your journey.

Why Choose Higher Logic Thrive Community Platinum?

- Tailored Projects: Select up to two projects per year from our Thrive Platinum Services Menu. Whether it's
 marketing material creation, community management, or implementation support, we've got the expertise you
 need.
- Bonus Sessions: Enjoy a planning session and a quarterly review with your Advisor. We'll keep you on track and provide actionable insights.

Services Platinum Menu by Solution

- Thrive Platform Platinum https://www.higherlogic.com/thrive-platform-platinum-menu/
- Thrive Platform Community https://www.higherlogic.com/thrive-community-platinum-menu/

ORDER FORM

Jack Stapleton Account Executive Higher Logic LLC jstapleton@higherlogic.com

Quote #: Created Date: Expires On: Q-307910-1 October 3, 2025 November 2, 2025

Bill To Ship To

Florida Government Finance Officers Association Florida Government Finance Officers Association

United States United States

This Order Form is effective as of the Start Date below and is by and between Higher Logic, LLC ("Higher Logic") and Florida Government Finance Officers Association ("Subscriber"), with principal offices at: , United States.

Terms and Conditions

The following lists the Software Services and Professional Services, and Third Party Products included in this Order Form. This Order Form, and the Software Services and Professional Services, are governed by the terms and conditions of the Higher Logic, LLC Master Subscription Agreement set forth at the following weblink: Master Subscription Agreement ("Master Subscription Agreement").

Initial Term: 48 Months Billing Method: Email
Billing Frequency: Annually Payment Term: Net 30

Billing Contact Full Name: Sales Tax Exempt: ales

Billing Email: Please provide tax exemption forms to

accounts@higherlogic.com or attach with this order form in

order to avoid sales tax on your future invoices.

SaaS Subscription Fees

	Annual Recurring Fees
Higher Logic Thrive Community Plus (100)	USD 22,500.00
https://www.higherlogic.com/thrive-community-plus-100/	
Mentor Match	USD 3,000.00
Total - SaaS Subscription Fees	USD 25,500.00

One Time Fees for Professional Services

	One Time Fees
Higher Logic Thrive Community Implementation	USD 4,800.00
Mentor Match Installation	USD 2,000.00
Total - One Time Fees for Professional Services	USD 6,800.00

Payment Terms	
Professional Services Fees to be invoiced upon signature	USD 6,800.00
Annual Subscription Fees to be invoiced upon signature	USD 25,500.00
Prices shown above do not include any taxes that may apply. This is not an invoice.	
Annual subscription fees to be paid for the first year of the initial term and one-time fees is invoiced upon signature unless otherwise specified above. For subsequent years of the initial term, the annual subscription fees will increase as listed under the Quote Special Terms section below and will be invoiced annually in advance on or before each annual anniversary of the contract.	
Unless otherwise specified in this Order Form, Contract start date is the date when this Order Form is returned to Higher Logic by the Subscriber and is fully executed by both parties.	
Due to rounding, any percentages referred to in this Order Form may not precisely reflect the absolute figures and actual invoice amounts may differ for the same reason.	

Quote Special Terms

If travel is required, Subscriber agrees to reimburse Higher Logic for its out of pocket reasonable travel expenses plus travel time at the hourly rate for Professional Services which will be invoiced to Subscriber monthly in arrears. All invoices for travel expenses and travel time are due and payable 30 days from receipt of Higher Logic's invoice.

If the initial term is for more than one-year, annual subscription fees will increase by 4.00% per year during the initial term. Sales, promotions, credits and other special discounted pricing offers are temporary, and any such discounted pricing offers will not apply to any renewal term. In addition, Higher Logic reserves the right to increase the fees payable for a renewal term upon written notice (which may be provided by email) to Subscriber.

Annual Recurring Fees are calculated by Higher Logic based upon certain Subscriber revenue assumptions. In the event Higher Logic determines that Subscriber has exceeded the applicable revenue assumptions, Higher Logic reserves the right to negotiate additional commercially reasonable fees corresponding to such excess use.

Implementation fees do not include migration of existing data if applicable, redesign of existing website, email validation for auto-subscriptions to Discussions or customizations to baseline products.

Professional Services as set forth in the Implementation Services Description at the following link: https://www.higherlogic.com/thrive-implementation/

Purchase Order Information

s a Purchase Order (PO) required for the purchase or payment of the services on this Order Form? (Subscriber to complete)
No
'es
PO Number:
PO Amount:

As set forth above, this Order Form is governed by the terms of the Higher Logic, LLC <u>Master Subscription Agreement</u> ("Master Subscription Agreement"). Upon signature by the Subscriber and submission to Higher Logic, LLC, this Order Form shall become legally binding unless this Order Form is rejected by Higher Logic, LLC for any of the following reasons: (1) changes have been made to this Order Form (other than completion of the purchase order information and the signature block), or (2) the requested purchase order information or signature is incomplete or does not match our records or the rest of this Order Form. This Order Form and the Software Services and Professional Services set forth above are non-cancelable once signed by Subscriber.

Florida Government Finance Officers Association	Higher Logic, LLC
Signature:	Signature:
Printed Name:	Printed Name:
Business Title:	Business Title:
Effective Date:	Date:





FGFOA: Modernizing Member Engagement

From listserv to community – a platform that's user-friendly, searchable, and sustainable.

Demo

https://us02web.zoom.us/rec/share/kKIZoo3K3EXt_3CUO0LZ_KuQAu50bwvMTUIUynoRUYP9Jgel0GnYTGcOxjvKQ87c.MfCX5i0CZ8nNouk5?startTime=1758816040000

Passcode: %*Tu8PA5

Current Challenges

- Listserv is email-only, not searchable, not sustainable.
- Members are asking for help but there is not ability to crowdsource knowledge
- Committee members are drowning in emails.
- Knowledge is siloed; resource library unavailble
- Only a small % of 3,000 members are active on the listserv.

Why Change Now

- Engagement gap will eventually become a retention problem.
- Large membership, low participation → missed opportunity.
- Members expect modern, mobile, searchable experiences.



The Experience Matters

Why Members Join & Stay:

Community, Knowledge and Learning

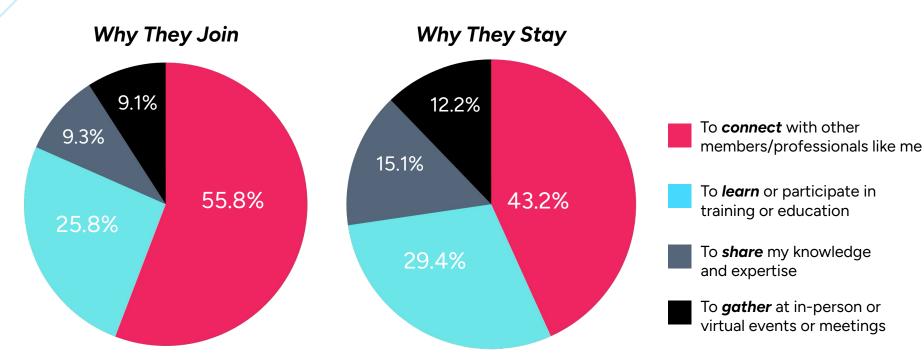
Why Members Leave:

Don't "feel" the value of membership and/or can't find the answers

2025 State of Member Experience Report

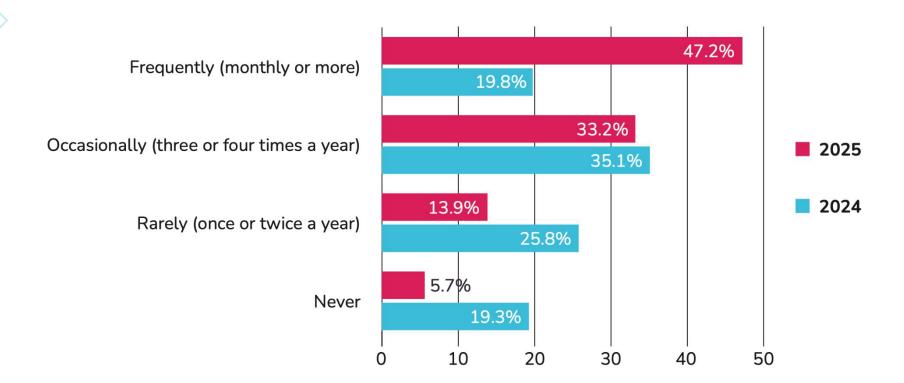
The Experience Matters:

Why a modern, connected member journey is the key to engagement, retention and renewal



Source: Forj State of Member Experience 2025

The Rise in Community Participation



Source: Forj State of Member Experience 2025

What percentage of those who engage frequently in community say they will *definitely renew*?

86.5%

Only 74% of those who engage less often will renew

Personalization is the Priority

Members don't want more content... they want the right content.



Curated Learning Paths

Match member roles and goals



Community Content

Surface the most relevant discussions



Smarter Technology

Helps guide them to what they need faster

Journey by Forj Product Vision

Today, professional member-based organizations striving to lead their industries and amplify their mission are burdened by a patchwork of outdated, disconnected tools and vendors that prioritize activity over impact.

This creates fragmented experiences, missed opportunities for growth, and a diluted brand, limiting their ability to stay ahead and serve as the authoritative voice in their field.

We envision a world where organizations are empowered to act **proactively** and **strategically** to advance their mission and continuously **strengthen their role** as *the* place where members belong and *the* trusted experience for industry leadership.

We are bringing this world to life through an intelligent platform that delivers a cohesive, modern experience, supported by services and partnership. Journey by Forj is purpose-built to give organizations the insight and agility to grow professional communities, deliver mission-aligned experiences, and scale their impact as trusted leaders in their field.

Experience by Design

Experience Pillars



Unified Journey

Seamless Experiences



Simple, Modern, Delightful

Differentiated by Design



Personalized & Adaptive

Al Powered



Trust & Belonging

"I belong here"

Enabling Layers

Intelligence

Tech-Enabled Services

Strategic Services

Strategic Framework Alignment

Strategic Priority	Forj Solution	Impact
Replace listserv with Forj Connect	Forj Connect	Provide a modern member experience
Support chapters with subgroups	Forj Connect	Increased engagement
Integrate with iMIS for SSO	Forj Connect	Ease of use for members
Provide reporting to reduce staff burden	Forj Analyze	Analyze results and continue to take action to improve and evolve as an organization

Future Member Experience

- Daily or weekly digests instead of constant emails.
- Subgroups for chapters and committees.
- Resource library that's searchable and organized.
- Member-to-member help that's easy to track.

Operational Experience for FGFOA leaders

- Saves Committee Members 750–900 staff hours annually (less email wrangling)
- Central hub reduces duplication.
- Better reporting = faster board and committee responses

Projected Financial Benefit

Engagement and Retention

- Today: 3,000 members.
- If 10% more engage regularly → higher renewal likelihood.
- Protects dues revenue; creates stronger community value.

FGFOA Recommendations

Low risk, high impact:

- Replace listserv with Forj Connect.
- Launch pilot with chapters & committees.
- Scale into resource library + mentorship.



Forj Connect

Annual Subscription: \$7,500 annually

Term: 3 years

Subscription

- Forj Connect Solution
- Unlimited Access
- Unlimited Use
- Unlimited Groups
- Unlimited Admins and Group Managers
- Access to Client Support
- Embedded Analytics

Services

- Implementation (\$5,000) Waived
- Unlimited Live Training (\$1,000) Included
- Future Forj Connect Product Enhancements Included

Access to Forj Analyze

Forj Analyze Annual Subscription: \$2,500 (3-year term)

- Access to Forj Analyze
- Out of the Box Dashboards with 40+ Reports
 - User Activity Dashboard
 - User Growth Dashboard
 - Posts Dashboard
 - Post Purposes Dashboard
 - Resources Dashboard
 - Search & Tags Dashboard
 - Chats Dashboard
- Ability to Filter Dashboards and Reports (i.e. date range or specific group)
- Ability to Schedule Reports
- Future Forj Analyze Feature Releases
- Training
- Al Assistant Real Language Prompts for Data Analysis

	Products & Services	Bundled Pricing
Annual Subscription	Forj Connect	\$7,500
Annual Subscription	Forj Analyze	\$2,500
One-Time Services	Implementation	\$5,000
Included Services	Unlimited Live Training	\$1,000
	Multi-Year Discount - Waived Service Fees	(\$6,000)
	Recurring Annual Fee - Forj Connect and Access to Forj Analyze	\$10,000
	Total 3-Year Commitment	\$30,000



About Us

At Tradewing, we're all about empowering associations through meaningful **connections**. We understand that when members feel truly connected—to each other, to their industry, and to their association—they ultimately drive their industries forward.

That's why we provide a dedicated platform and services designed specifically for trade and professional organizations. We strive to make it easy for associations to engage their members and grow thriving communities.

With the right tools and support from Tradewing, associations can strengthen membership, boost participation, and deliver lasting value. Trusted by leading organizations across industries, Tradewing is your partner in building stronger connections, deeper collaboration, and greater success.

Built for Belonging, Designed for Growth.

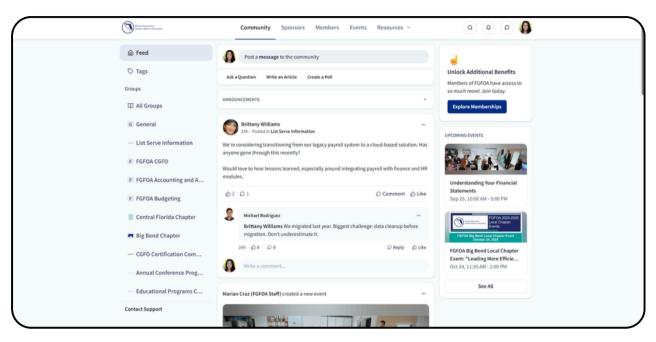


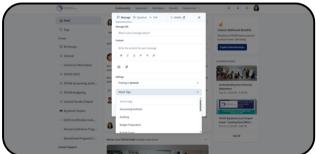


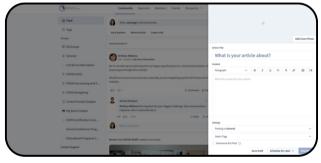
Core Offerings

Core Offerings

Member Engagement Tools







Tradewing makes it **easy to build vibrant, connected communities**. With personalized dashboards, onboarding flows, interest-based groups, and built-in messaging, members stay engaged and informed every step of the way.

Community Discussions

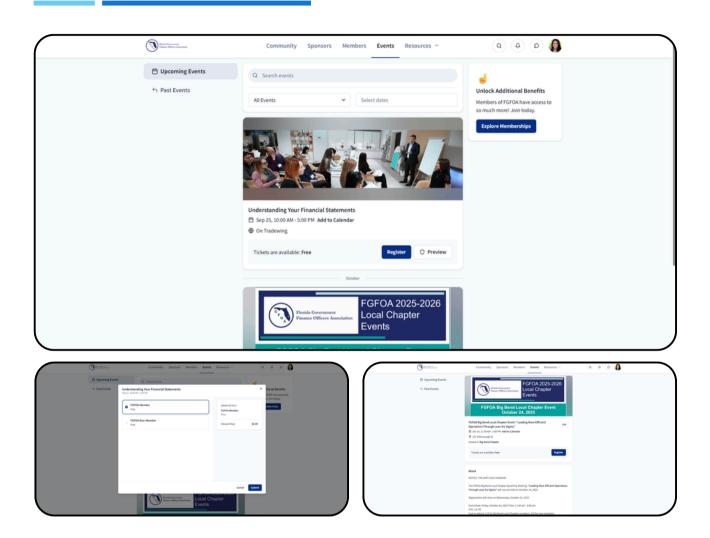
Gain access to spaces where members can exchange ideas, ask questions, and stay informed, ensuring ongoing dialogue around key interests and initiatives.

Peer Collaboration and Engagement

Foster vibrant community interactions through Tradewing's articles, polls, peer-topeer messaging, and discussion spaces that drive knowledge sharing, networking, and deeper community bonds.



Events (In Person, Online, and Hybrid)



Whether fully virtual, face-to-face, or hybrid, Tradewing events foster dynamic experiences that drive attendance and interaction while keeping logistics simple.

Streamlined Event Management

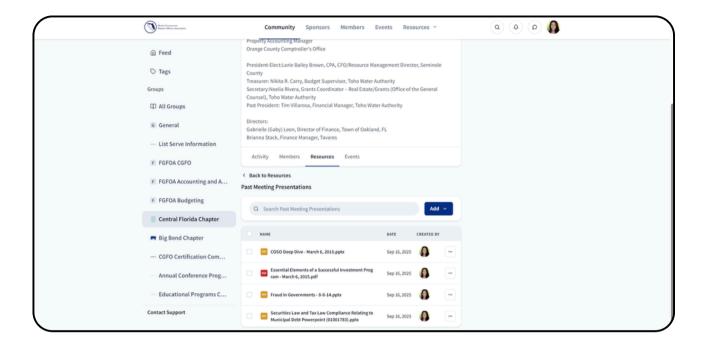
Easy-to-use tools for setting up, managing registration, and hosting webinars, live sessions, and hybrid events.

Integrated with Association Management

Tradewing connects with over 30 AMS's so that you and your members get a seamless experience through SSO and data integration.



Resource Library



Empower members with always- available access to curated content. Tradewing's resource libraries make it easy to store, share, and discover key assets.

Centralized Content Access

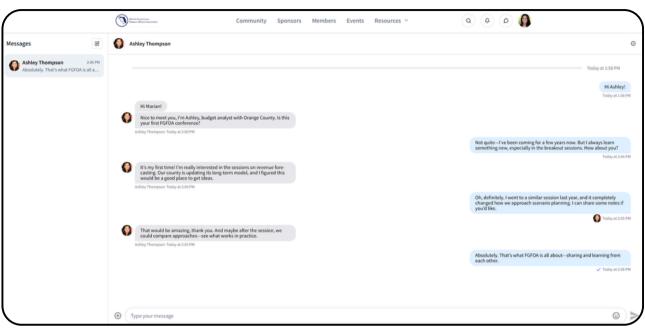
Provide easy access to curated resources and foster engaging, interest-driven discussions through centralized knowledge hubs and topic-based forums.

Organized & Searchable

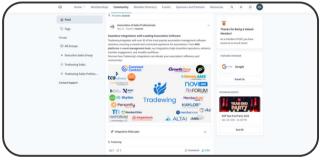
Categorize by topic, group, or event with intuitive filters, member permissions, and admin controls.



Real-time Discussions & Knowledge Sharing







Foster meaningful dialogue and peer-to- peer learning with Tradewing's interactive communication tools. Designed to energize your community, these spaces enable professionals to connect, collaborate, and exchange insights.

Instant Member Interaction

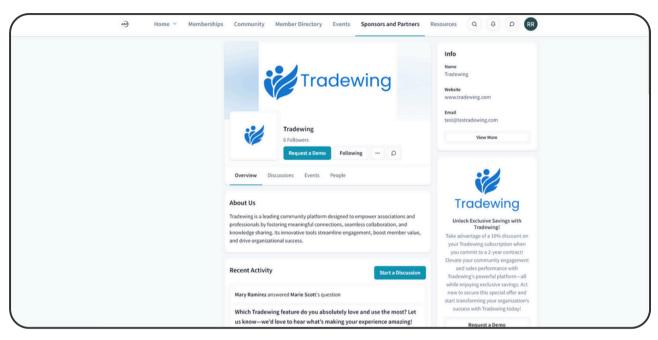
Live discussions, group chats, and direct messaging keep members connected and engaged at any time.

Expert-Led Knowledge Sharing

Associations can host AMA (Ask Me Anything) sessions, webinars, and knowledge-sharing events led by industry experts, fully integrated with member directories and event tools to extend networking beyond formal sessions.



Sponsor Engagement and Monetization







Tradewing helps associations turn engagement into revenue with meaningful sponsorship opportunities woven directly into the community experience.

Sponsor Visibility and Engagement

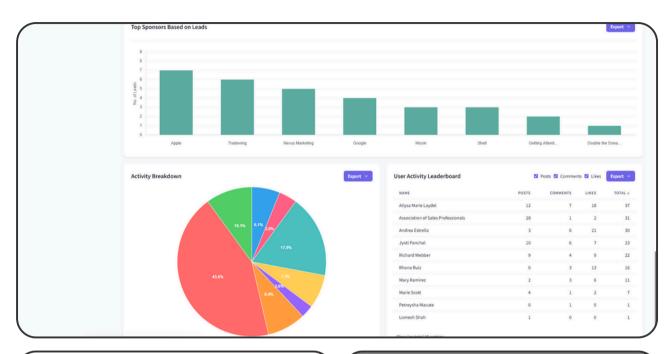
Showcase sponsors with branded pages, featured content, and prominent placements across events and community spaces.

Monetization and Relationship Tools

Offer custom sponsor tiers, targeted advertising, and ROI analytics while supporting ongoing sponsor communication and uncovering new revenue opportunities.



Data Analytics







Make every decision count with data that works for you. Tradewing delivers actionable insights on member behavior, content performance, and event impact.

Insightful Member and Content Analytics

Track member activity, content engagement, and trending topics to better understand what drives participation and value.

Event and Sponsor Performance Metrics

Monitor event attendance, audience interaction, and sponsor effectiveness to refine programming and maximize ROI.



Other Inclusions

Virtual Events and Webinars

- Host open virtual events, private meetings, and webinars using the built-in virtual conferencing tool
- Integrate seamlessly with popular platforms like Zoom and GoToWebinar
- Manage event access with ticketing and registration
- · Record and publish virtual sessions
- Livestream in-person events
- Custom registration forms
- Exportable registration reports

Member Profiles

- Integration with the association's existing database (if applicable)
- Customizable member profiles, with options for members to control the visibility of their personal data
- A searchable member directory
- · Badge system and direct messaging

Membership Types

- Unlimited membership types
- Tradewing supports both individual as well as corporate membership types
- Custom membership sign up forms
- Unlimited attributes for membership sign up forms

Renewals

- Tradewing supports automatic renewals
- Tradewing sends out renewal reminders automatically via email

Community Engagement and Content Sharing

- Publish a variety of content types including questions, articles, polls, discussions, images, links, videos, and files.
- Ability to limit posts to specific groups or audiences
- Tag posts with association-defined topics
- Moderation tools and reporting capabilities
- Searchable posts through the platformwide search function

Sponsor and Vendor Features

- Dedicated landing pages for sponsors and vendors
- Sponsor/vendor logins to manage and update their own content
- Premium engagement features and lead-generation tools, including direct call-to-action buttons

Payment Options

- Tradewing supports payments via Stripe
- Payment can be completed via credit card, ACH, or invoice
- Tradewing allows you to provide monthly payment plans*

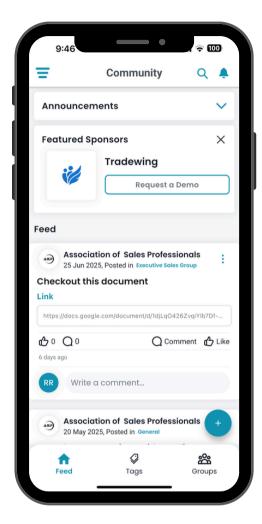


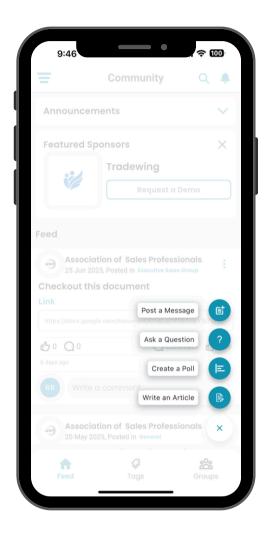


Bonus Features

Bonus Features

Mobile Application





Stay connected with your community on the go. Tradewing's mobile app offers seamless access to your association anywhere, and anytime.

intuitive Interface and Experience

Designed with simplicity and ease of use in mind, its interface ensures members can quickly find discussions, events, and resources without unnecessary clicks.

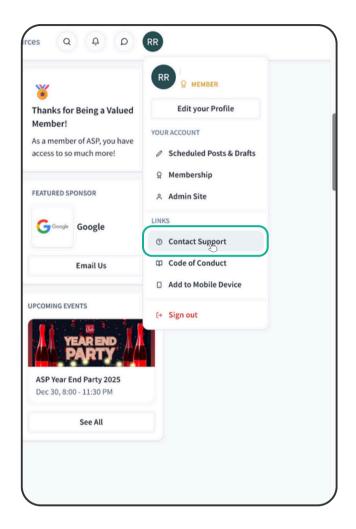
Customizable Pages

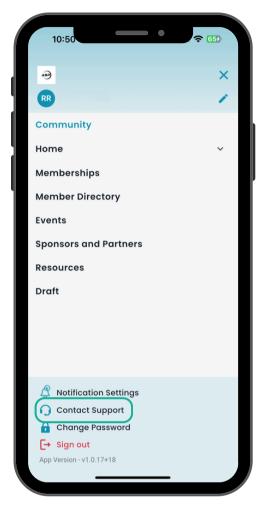
Members can engage in real-time conversations, join events, and access key content on the go, bringing the full Tradewing experience right to their fingertips.



Bonus Features

Empathic Support, Expertly Delivered





We operate as an extension of your association, providing dedicated support from day one. An onboarding specialist and kickoff call ensure alignment on your goals and timeline so you're set up for success from the start.

Responsive and Reliable

With an average response time of just 15 minutes, we prioritize your time and your mission. We offer thoughtful support with a deep understanding of your needs.

Personalized Support Every Step of the Way

Our customer success team takes the time to learn your unique goals, delivering tailored strategies and proactive solutions to help your community grow and evolve with confidence.

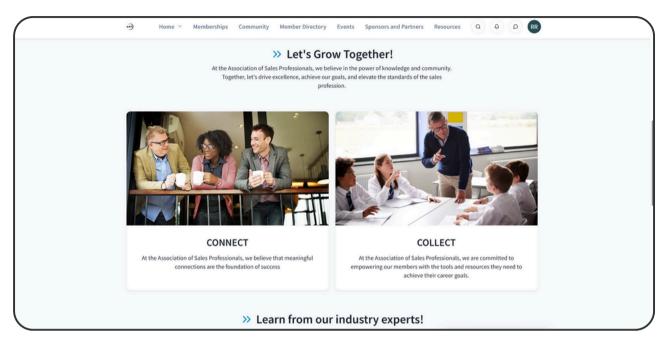




Add-Ons

Add-Ons

Website Builder







The interface allows users of all skill levels to create a polished, professional presence with minimal effort.

Templated Layouts

Each layout is thoughtfully structured to guide content placement, helping users quickly launch a visually appealing site that aligns with their brand.

Customizable Pages

Easily customize fonts, colors, imagery, and content blocks to reflect your unique brand identity. Elements are flexible, giving you creative control without compromising usability.



Member Management

Membership Management

- Tradewing allows you to manage your members individually
 - Drill down into all data collected on individual member profiles
- Tradewing allows you to manage corporate members
 - Drill down into all the individual that inherit benefits from your corporate members and all data collected on your company in your company member profiles
- Manually extend or terminate any membership
- Ability to impersonate members to make changes on their behalf

Member Management Analytics

- Track member activity, engagement trends, and retention metrics to make smarter, data-driven decisions.
 - Month over month comparison
 - Year over year comparison
 - Drill-down reports
 - Engagement, Member, and Sponsor Analytics





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OTHER BUSINESS:	

NEXT MEETING:
Friday, January 16, 2026 – Location TBD