

# New England States Government Finance Officers Association



## 76th Annual Conference September 10-13, 2023 Samoset Resort, Rockport, Maine



# New England States Government Finance Officers Association

# PRESIDENT'S WELCOME

Dear Friends and Colleagues,

I am so pleased to welcome you to the 76th anniversary of the New England States Government Finance Officers Association (NESGFOA) Fall Conference at the oceanfront, picturesque Samoset Resort in Rockport, Maine! The Samoset offers the best showcase for what Maine has to offer.

If you have attended these conferences before, you now we not only like to learn and network with colleagues and vendors, but we like to have fun. Sunday will have the traditional Golf Tournament and for those who don't golf, we are providing transportation to and from downtown Rockland so you can visit the shops, pubs, waterfront and the Farnsworth Museum, displaying famous Maine artists N.C, Andrew and Jamie Wyeth. You don't have to worry about parking, or driving back and forth.

Monday starts with our keynote speaker, Travis Mills. You may have heard of Travis, but if you haven't, his story is not only inspiring, but appropriate for September 11. Travis lost portions of his arms and legs from an IED while on active duty in Afghanistan. Instead of crawling home to wallow in his unfortunate state, he overcame his challenges and defied all odds. In September of 2013, Travis and his wife Kelsey founded the [Travis Mills Foundation](#), a nonprofit organization, formed to benefit and assist post 9/11 veterans who have been injured in active duty or as a result of their service to our nation. The veteran and their families receive an all-inclusive, all-expenses paid, barrier-free vacation to Maine where they participate in adaptive activities, bond with other veteran families, and enjoy much-needed rest and relaxation in Maine's great outdoors. I am sure you will be moved by Travis's presentation, and we are fortunate to have him as a Maine native.

Then we have fun with the traditional and expected in Maine LOBSTER BAKE! Music and dancing...did I say DANCING...with Whoopy Kat! You'll love it!

Tuesday starts with a unique but current presentation by what I call an inspirational speaker, James Vukelich. James is recognized as a leading voice on the interconnectedness of language & culture. His keen insights were developed through speaking with and recording elders and native language speakers (many of whom have since passed on) in Canada, Michigan and Minnesota as part of the Ojibwe Language Dictionary Project. His mission is to inspire people to live the good life by sharing ancient wisdom to influence modern solutions through an indigenous perspective. Maine's history includes a legacy of indigenous people, who to this day help support the economy and culture of this State. You will find James insightful, and entertaining. He will make you think.

Again, FUN on Tuesday night with a Casino Night! This event combines the reception, dinner, snacks, desert and trying your luck.

In between, we will learn a lot, connect with colleagues, and make new connections. And please, PLEASE, remember to thank the sponsors, who without which this great event would not be possible. See you on the dance floor!

*Ellen Sanborn, NESGFOA President 2023*

## Key Info!

**Registration:** The full conference registration fee for attendees and guests includes admission to all the general sessions, meals, entertainment, and nightly social activities. Single Day attendee registration includes lunch only. **Name badges are your "ticket" and MUST be worn to all conference events, including the social events in the evenings.** For those who have event specific tickets, you will need to present them. Also, if you

have full registration, you have 2 drink tickets for each reception.

**Internet Access:** There is open internet wireless access in guest rooms and the conference event space at the hotel. Guest room password will be last name of the registered guest and room #. Conference areas will be Samoset.

**Schedule:** The schedule is available via QR code. The code is available at the registration desk.

**This Brochure:** Is not in print form. We felt that the electronic availability of information negated the need for hard print copies, most of which are thrown away. The resort map is in each room and at the reservations desk. You can print any or all of the online brochure that you need a hard copy of, or the complete brochure is available via QR code at the registration desk. A copy of the schedule will also be posted at the registration desk.

**CPE Credits:** Conference attendance provides for 14 hours of CPE credits. CPE sheets will be available at the end of each day in the back of the conference room and at the conference registration desk.

**Presentations:** Presentations for each session will be posted on the NESGFOA website at [www.nesgfoa.org](http://www.nesgfoa.org) and can be downloaded and/or printed prior to the conference.

**Sponsors:** Sponsor attendees will have green name badges. PLEASE make sure to thank them as you see them during the conference, we truly could not have these events at an affordable cost without their generous support.

## **Special THANKS to the 2023 Conference Planning Committee!**

Megan Brackett, Finance Director, Town of Rockport  
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**New England States GFOA  
76<sup>th</sup> Annual Fall Conference  
Rockport, Maine  
September 10-13, 2023**

**Schedule of Sessions and Events**

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**Sunday, September 10, 2023**

12:00 pm – 4:30 pm **Registration** – Lobby

**12:00 pm – 5:00 pm Shuttle service to Historic Downtown Rockland**

Van service by Country Coach Charters to and from downtown Rockland. Visit the Farnsworth Art Museum, the Maine Lighthouse Museum, walk out to the Rockland Breakwater Lighthouse, shop eclectic stores or grab a beverage at one of the local pubs. Pick up and drop off at the front entrance, every half hour.

*Sponsored by: Webster Bank*

**12:30 pm – 5:00 pm Annual Golf Tournament – Samoset Course**

*Registered players only - meet at Clubhouse*

*Sponsored by: Washington Trust*

**6:00 pm – 8:30 pm Maine Welcome Reception - Bay Point Ballroom**

*Sponsored by Maine vendors: Baker Newman Noyes (BNN)*

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## MONDAY, September 10, 2023

7:00 am – 9:00 am **Breakfast Buffet** – *State of Maine*

*Sponsored by: CliftonLarsonAllen LLP*

8:00 am – 4:00 pm **Registration** – *Lobby*

9:00 am – 9:15 am **Welcome** – *Knox County Ballroom*

**NESGFOA President – Ellen Sanborn**

**GFOA's President-elect - Tanya Garost**

9:15 am – 10:15am **Travis Mills, Keynote Speaker – Never Give Up, Never Quit**

*Sponsored by: Bank of America/Merrill Lynch*

Retired U.S. Army Staff Sergeant, quadruple amputee, N.Y. Times Best Selling Author and founder of the Travis Mills Foundation, Travis is a seasoned veteran of the speaking stage who has shared his story with millions around the world. Unabashedly using humor while sharing a story many would consider tragic, Travis redefines human capability and the remarkable power attitude has upon outcome. Be prepared to laugh, to reflect, to laugh again, and to stand up and cheer as Travis shares the astonishing story of how he, and his wife Kelsey, live their motto "Never Give Up - Never Quit."

10:15 am – 10:30 am **Morning Coffee Break** – *Knox County Hallway*

*Sponsored by: Locke Lord*

10:30 am – 11:30 am **CONCURRENT SESSIONS**

**Cybersecurity Landscape in 2023 (and what does it mean to my organization)** – *Knox County Ballroom*

*Presented By: Pawel Wilczynski, Baker Newman Noyes CPA*

Attendees will come away from this program with a better understanding of the key takeaways from the 2022 Verizon Data Breach Investigations Report (DBIR), current events related to cybersecurity, updates in cybersecurity regulations and how companies can stay safe in a complicated security environment. They'll also learn the nuts and bolts of what third-party risk management is and why it's important.

10:30 am – 11:30 am **Key Drivers in the Economy and Markets in the Next 12-18 Months**–  
*Bay Point Ballroom*

*Presented By: Sid Vaidya, TD Bank*

This presentation will provide information and insights about the global factors and macro themes that will shape and impact the US and global economies. In addition, the presentation will provide a market outlook and asset allocation positioning recommendations given the economic backdrop.

**MONDAY (continued)**

11:30 pm – 12:30 pm **Annual Business Lunch & Election of Officers – State of Maine**

*Sponsored by: US Bank*

12:30 pm – 1:30 pm **Busy to Burnout and Back - Knox County Ballroom**

*Presented By: Abby DiPasquale, Maine Municipal Association*

*Sponsored By: MissionSquare Retirement*

From the “Great Resignation” to “Mediocre Mondays” and those who are “Quiet Quitting”- why are so many employees becoming disengaged? Unfortunately, this isn’t new but changes in our world have helped to shine a light on how our “hustle culture” has left us feeling unbalanced and burned out! But fear not, simple changes to our routines can revamp our connections and bring us from exhausted to extraordinary at work and in our lives.

1:30 pm – 2:30 pm **CONCURRENT SESSIONS**

**Post Issuance Compliance – Knox County Ballroom**

*Presented By: Zach Brandwein, Bernstein Shur*

Everything you were afraid to ask, but need to know, about compliance with municipal bonds!

**Internal Controls in the Finance Office – Bay Point Ballroom**

*Presented By: Scott McIntire, Marcum LLP*

*Sponsored by: PFM*

Internal controls are essential to all organizations as controls provide the framework to help ensure complete and accurate financial reporting. Learn how effective controls can enhance your organization and add value to financial reporting.

2:30 pm – 2:45 pm

**Afternoon Break – Knox County Hallway**

*Sponsored by: Santander Bank*

2:45 pm – 3:45 pm **Economic Update – Knox County Ballroom**

*Presented By: Amanda Rector, State Economist, State of Maine*

*Sponsored by: Bartholomew & Company*

This presentation will provide updates on demographic and economic conditions in Maine and New England. Topics will include population and migration, labor force and employment, and personal income as well as national economic indicators.

**Monday (continued)**

3:45 pm – 4:45 pm

**Talent Attraction and Retention in the Government Workforce – Bay Point Ballroom**

*Presented By: Shayne Kavanagh, Chris Morrill, Tanya Garost, GFOA*

Since the start of the pandemic, state and local government finance offices have been experiencing major challenges in recruiting and retaining talent. There is a growing gap between the supply of available positions and insufficient demand for these opportunities – which will only grow with the increasing wave of retirements. Research from a GFOA publication, *Meeting Demand for State and Local Public Finance Jobs*, will be presented to understand the full scope of the problem. Strategies for recruiting and retaining government finance talent will then be presented based on GFOA research and case studies on workforce engagement.

6:00 pm – 7:00 pm **Cocktail Reception – Tent**

*Sponsored by: Citizens Bank*

*Tent Sponsored by Mascoma Bank*

7:00 pm – 8:30 pm **Lobster Bake Dinner – Tent**

*Sponsored by: Northeast Bank*

*Tent Sponsored by Mascoma Bank*

8:30 pm – 10:00 pm **Music and Dancing with Whoopy Kat – Tent**

*Sponsored by: Raymond James & Associates, Inc.*

*Tent Sponsored by Mascoma Bank*

## **TUESDAY, September 12, 2023**

7:00 am – 9:00 am **Breakfast Buffet – State of Maine**  
*Sponsored by: JP Morgan Chase*

8:30 am – 4:00 pm **Registration - Lobby**

9:00 am – 10:00 am **James Vukelich Kaagegaabaw, Inspirational Speaker – Seven Generations and the Seven Grandfather Teachings - Knox County Ballroom**

*Sponsored by: Rockland Trust*

James Vukelich Kaagegaabaw, a descendent of Turtle Mountain, is an international speaker, author & the creator of Ojibwe Word of the Day.

His mission is to inspire people to live the good life by sharing ancient wisdom to influence modern solutions through an indigenous perspective, which he has developed through speaking with and recording elders and native language speakers, many of whom have since passed on. This talk will present the traditional teachings of the Anishinaabeg as a means of developing interconnectedness and interdependence. The seven grandfather teachings, the sacred law of the Anishinaabeg, show us how to lead Mino-bimaadiziwin 'the good life' a life of without contradiction or conflict, a life of peace and balance.

10:00 am – 10:15 am **Morning Coffee Break – Knox County Hallway**  
*Sponsored by: Moody's Investors Service*

10:15 am – 11:15 am **CONCURRENT SESSIONS**

**Funding, Financing and Financial Reporting:  
News You Can Use from DC – Knox County Ballroom**

*Presented by: Emily Brock, GFOA*

*Sponsored by: PFM Asset Management*

Congress passed a whopping \$5T in stimulus and grant programs over the past three years. GFOA members are overwhelmed with the relentlessness of the alphabet soup, whether it's challenges and opportunities of ARPA closeout, assessing notices of funding opportunities from IIJA and understanding key tax advantages of clean energy investments from the IRA. In the meantime, federal legislation recently passed that may fundamentally change how you reconcile your financial reports. Come to this session to get your bearings on all things federal and how certain opportunities and even a few obstructions might challenge your jurisdiction.



## **TUESDAY (continued)**

10:15 am – 11:15 am **FEMA Update – Bay Point Ballroom**

*Presented By: Naomi Petley, Maine Emergency Management Association (MEMA)*

The primary goals of the FEMA Public assistance Program are to save lives first and foremost, then protect property as immediate reactions to disasters. Once secure, providing financial assistance to restore community infrastructure to safe operations is also a key priority. FEMA provides firm guidelines about what type of work in emergency response and disaster recovery is considered “eligible” for reimbursement. This session will explain those guidelines, the federal disaster declaration award process and provide details on how to maximize reimbursement costs for eligible activities such as labor and equipment.

11:30 pm – 12:30 pm

**Lunch – State of Maine**

*Sponsored by: M&T Bank/Wilmington Trust*

12:30 pm – 1:30 pm

**What to Expect When Talking with the Rating Agencies – Knox County Ballroom**

*Presented By: Geoffrey Buswick, S&P Global Ratings*

Join this session to hear ‘the basics’ and ‘the latest’ in terms of credit trends. We’ll first review the process of getting a rating and how all parties prepare to achieve the best outcome. This would be helpful for both the new finance director as well as the seasoned veterans. Then we’ll dive into hot topics including changing federal support, workforce challenges, and emerging AI & DeFi. Topics such as these may come up in the rating process or from investors as they consider the bond issue.

1:45 pm – 2:45 pm **CONCURRENT SESSIONS**

**Interacting with a Changed Workforce: Remote Working – Knox County Ballroom**

*Presented By: Kim Lord, City of Manchester CT and  
Bill Fazioli, Rhode Island Bond Bank*

This session will demonstrate how incorporating remote work options can lead to an effective and productive government finance operation.

**Fraud and Forensics – Bay Point Ballroom**

*Presented by: Jenny Dominguez, CliftonLarsonAllen LLP*

This presentation will discuss some common ethical challenges and fraud risks faced by government officials and employees. You will learn about key concepts in ethics and current fraud trends to help identify potential fraud risks. Case studies will be used to help demonstrate the impacts of fraud and how to improve internal controls to reduce the risks of fraud.

**TUESDAY (continued)**

2:45 pm – 3:00 pm **Afternoon Break** – *Knox Hallway*

*Sponsored by: S&P Global Ratings*

3:00 pm – 4:30 pm **GASB Update** – *Knox County Ballroom*

*Presented By: Lisa Parker, GASB*

This session will give an overview of the GASB pronouncements that become effective in the coming fiscal years. The session also will explain some of the projects on GASB's current technical agenda and research agenda.

6:00 pm – 9:00 pm **Cocktail Reception** – *Knox County Ballroom*

**Buffet Dinner** – *Knox County Ballroom*

*Sponsored by: TD Bank*

**Casino Night** – *Knox County Ballroom*

*Sponsored by: Camden National Bank*

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## **WEDNESDAY, September 14, 2022**

7:00 am – 9:00 am **Breakfast** – *State of Maine*

9:00 am – 10:15 am     **USDA Rural Development Programs & Municipal Loan Programs** –  
*Knox County Ballroom*

*Presented By: Alex Shih, Nick Roederer, Raymond James*

Essential community infrastructure is key in ensuring that rural areas enjoy the same basic quality of life and services enjoyed by those in urban areas. USDA's various loan programs offer low-cost direct loans, loan guarantees and grants to develop or improve public services and facilities in communities across rural America. These amenities help increase the competitiveness of rural communities in attracting and retaining businesses that provide employment and services for their residents. For borrowers that do not qualify for Federal loan programs like the USDA, they can utilize Municipal Loan Programs that may offer more attractive features than individual debt issuances.

10:15 am – 11:15 am     **Elements of a Successful Performance Feedback in Today's Workforce**  
– *Knox County Ballroom*

*Presented By: Amy Harkins, KMA*

The ability to provide your team with valuable performance feedback can improve engagement, outcomes, and retention among employees and have a positive impact on the business overall. In this session, we will discuss the importance of good performance feedback, and why it matters to your employees and your business. We will discuss tools and techniques for delivering performance feedback that will set your employees and your business up for success.

11:15 am **Conference Ends** – **Safe Travels Home**

***See you next year in Mystic, CT!***

# MONDAY NIGHT

All events take place in the outdoor tent – *Sponsored by Mascoma Bank*

**6:00pm - 7:00pm**    **Cocktail Reception** - *Sponsored by: Citizens Bank*

**7:00pm - 8:30pm**    **Lobster Bake Dinner** - *Sponsored by: Northeast Bank*

**8:30pm - 10:00pm**    **Whoopy Kat Band-** *Sponsored by: Raymond James & Associates*



# TUESDAY NIGHT

**Come and take your chances!**

## Casino night in the Knox County Ballroom

**6:00pm - 7:00pm**    **Cocktail Reception**

**7:00pm - 9:00pm**    **Buffet Dinner**  
*Sponsored by: TD Bank*

**6:00pm - 9:00pm**    **Casino is Open!**  
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**Phoenix Advisors LLC**

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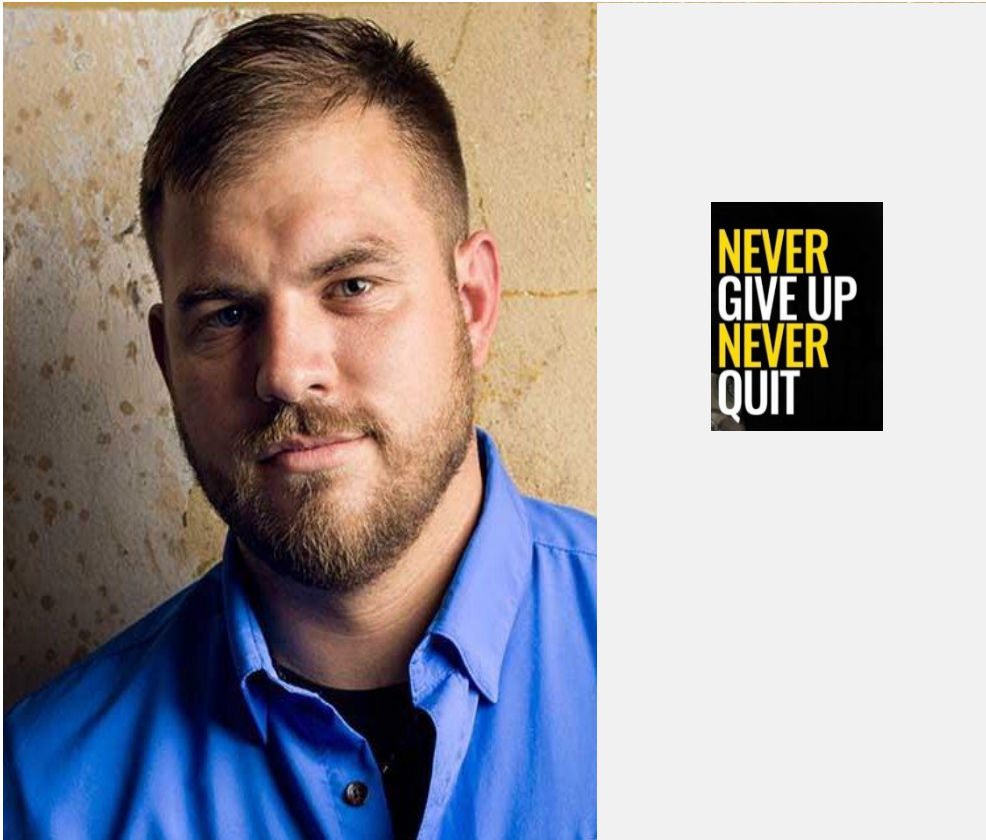
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## MEET THE PRESENTERS



### Travis Mills

Motivational Speaker

Retired U.S. Army Staff Sergeant Quadruple Amputee

N.Y. Times Best Selling Author

Founder – Travis Mills Foundation

If you're looking for a sob story you've come to the wrong place, and Travis himself will be the first to tell you so. But if you're looking for an inspiring speaker who epitomizes resilience and who will leave an indelible mark on your audience then Travis is your man. Be prepared to laugh, to reflect, to laugh again, and to stand up and cheer as Travis shares the astonishing story of how he, and his wife Kelsey, live their motto "*Never Give Up - Never Quit.*"

The subject of the NETFLIX original movie "Travis - A Soldier's Story" and author of the N.Y. Times Bestseller "Tough As They Come", Travis is a seasoned veteran of the speaking stage who has shared his story with millions around the world. Unabashedly using humor while sharing a story many would consider tragic, Travis redefines human capability and the remarkable power attitude has upon outcome.

Travis Mills is a speaker you will never forget.

**James Vukelich Kaagegaabaw****The Seven Generations and the Seven Grandfather Teachings.**

James Vukelich Kaagegaabaw, a descendant of Turtle Mountain, is a renowned international speaker, author and digital creator who is known for his social media series, 'Ojibwe Word of the Day.' His keen insights were developed through speaking with and recording elders and native language speakers across North America as part of the Ojibwe Language Dictionary Project.

James is a passionate advocate for sharing how to live a life of 'mino-bimaadiziwin,' the good life. For over twenty years, he has facilitated community language tables, consulted with public and private organizations on language and cultural programs, and traveled internationally as a keynote speaker. He has been featured in numerous publications, podcasts, radio and television programs.

James lives in the Twin Cities, Minnesota with his wife and son.



**Zack Brandwein, Bernstein Shur - presenting Post Issuance Compliance***Monday 1:30-2:30pm*

Zack serves as bond counsel for numerous municipalities and non-profit organizations. He has helped clients issue over \$150 million in tax-exempt bonds and advised issuers on intricate tax compliance issues long after their projects have been built. He also represents large companies, municipalities, and individuals in complex commercial cases ranging from contract disputes to environmental torts to class action defense. His passion for litigation enables him to counsel clients and guide them through complex issues while aggressively representing their interests. Zack obtained his law degree from the University of Tulsa College of Law and is licensed to practice in Maine and Massachusetts. Zack also holds a Master's degree in Public Policy from the University of Southern Maine.

**Emily Brock, GFOA - presenting Funding, Financing and Financial Reporting***Tuesday 10:15-11:15am*

As Director of GFOA's Federal Liaison Center, Emily leads coalition and advocacy efforts of the Public Finance Network in Washington DC. Her advocacy includes anticipating and responding to federal legislative and regulatory activities that impact the finance functions of state and local governments and public sector entities including tax reform, municipal securities disclosure and public pension and benefit issues. Emily also serves as staff on GFOA's Debt Committee, working with committee members to develop best practices that promote sound financial practices for local, state and provincial governments. Prior to joining GFOA, Emily was a commercial bank relationship manager at a large national bank, serving as the sole bank liaison for government and university clients.

**Geoffrey Buswick, S&P Global Ratings - presenting What to Expect when Talking with Rating Agencies***Tuesday 10:15-11:15am*

Geoffrey Buswick is a Managing Director and Government Sector Leader in the U.S. Public Finance department at S&P Global Ratings. Along with credit work, Geoff focuses on market outreach, developing research, and analytical education about S&P Global's approach to rating government entities. Prior to joining Ratings, Geoff served as the Finance Director for the City of Gloucester, Mass., and previous to that was the Administrative Officer for the City of North Adams, Mass. Geoff served on the board of governors of the National Federation of Municipal Analysts (NFMA) and was the co-chair for the 2012 and 2013 NFMA Annual Conferences. In 2017, he received the "Award for Excellence" from the NFMA for his work to improve market-wide disclosure of alternative financings.

**Abigail DiPasquale, Maine Municipal Association - presenting Busy to Burnout and Back***Monday 12:30-1:30pm*

Abby has been a health promotion coordinator with Wellness Works at the Maine Municipal Employees Health Trust for almost 20 years. As a health educator, she has spent many years working with municipalities to create, implement and improve wellness programs for employees- covering everything from nutrition, to women's health, personalities, and most recently mental health first aid.

**Jenny Dominguez, CliftonLarsonAllen LLP - presenting Fraud and Forensics***Tuesday 1:45-2:45pm*

Jenny has over eighteen years of experience conducting complex forensic accounting and fraud investigation projects, fraud risk assessments, internal control reviews, litigation support, and anti-fraud and ethics training. She serves clients in many industries, including education, state and local government, not-for-profit, construction, manufacturing, and other for-profit entities. Jenny has investigated numerous allegations of conflict of interest, employee embezzlement schemes and other asset misappropriation, and deficient financial disclosures

**William Fazioli - presenting Remote Working***Tuesday 1:45-2:45pm*

Bill Fazioli is an award-winning public servant specializing in the development and implementation of financial plans, along with formulating economic development and climate resiliency strategies. His background includes over 30 years of experience serving in senior roles in public finance banking, along with holding finance, planning and management positions in municipal government. He has served as the Executive Director of the New England States Government Finance Officers Association since 2003. In 2018 Bill was appointed as Chair of the East Providence Waterfront District Redevelopment Commission. Bill earned an MPA degree in public finance from SUNY-Albany and a BA in public administration and sociology from Rhode Island College. In 2021, Bill was presented with the Robert M. Goodrich Distinguished Public Service Award for outstanding contributions to local government by the RI Public Expenditure Council.

**Tanya Garost, GFOA President Elect***Presidents Welcome*

Tanya Garost is the Chief Administrative Officer with the District of Lake Country in British Columbia, Canada. With 20-years in local government finance, her past positions include Chief Financial Officer for the District of Lake Country, GM of Finance and Corporate Services for the City of West Kelowna, Director of Finance for the Thompson Nicola Regional District and Revenue Manager for the City of Kamloops. Tanya is a Past President of the Government Finance Officers of British Columbia and started with GFOA by sitting on the Canada standing committee on Canadian Issues in 2017 and then joining the Executive Board in 2020.

**Amy Harkins, KMA - presenting Elements of a Successful Performance Feedback in Today's Workforce***Wednesday 10:15-11:15am*

With more than 20 years of human resources experience, Amy has worked in a variety of business settings, from non-profit healthcare to for-profit manufacturing. In these roles she gained skills in many HR functions, including recruitment/onboarding, retention, benefits administration, training, coaching and performance review processes, policies/procedures, compliance and safety/wellness. Amy has an undergraduate degree in liberal studies from the University of Maine at Augusta, as well as a B.S. in Business Administration with a concentration in Human Resources from SNHU. She holds a Certificate in Human Resources from the University of Southern Maine, and a Certificate in Workplace Wellness.

**Shayne Kavanagh - presenting Talent Attraction and Retention in the Government Workforce***Monday 3:45-4:45pm*

Shayne is the Senior Manager of Research for GFOA and has been a leader in developing the technique of long-term financial planning and policies for local government. He started GFOA's long-term financial planning and policy consulting offering in 2002 and has been working with governments on financial planning and policies ever since. Most recently, Shayne has pioneered the use of computer simulation to "stress test" the long-term financial position of local governments. Shayne has worked with many governments of different sizes and types on financial planning and policies across the United States and Canada. His work with local governments has earned him a fellowship with the National Academy of Public Administration, a position on the board of advisors for the University of Chicago's Center for Municipal Finance, and recognition as one of the 100 most influential people in local government by Engaging Local Government Leaders. Shayne's financial planning experience also drives his research at GFOA.

**Kimberly Lord, Director of Finance, Manchester CT - presenting Remote Working is Working and it's Here to Stay***Tuesday 10:15-11:15am*

Kimberly Lord is Director of Finance in Manchester, CT, a small city with 60,000 residents. She oversees a staff of twenty-two government finance professionals across four divisions. Kim is past President of Connecticut GFOA, sits on the Capital Region Purchasing Council executive board and serves on the Capital Region Council of Governments Municipal Service Committee and CIRMA Claims Advisory Committee. She has a BS in Business Administration, is a Certified Public Finance Officer, a Certified Connecticut Municipal Collector, and has twenty-four years of experience in government finance. In March 2020, Kim's staff moved to 100% remote work for three months in response to the pandemic. Her department now operates with flexible hours and all staff members have an option to work from home three days per week. Kim believes that leading by example and fostering trust and open communication with her employees leads to a highly effective workplace culture.

**Scott McIntire, Marcum LLP - presenting Internal Controls in the Finance Office***Monday 1:30-2:30pm*

Scott McIntire is an assurance partner in Marcum's Merrimack office and New England leader of the Firm's Government and Public Administration Industry Group. He has extensive governmental accounting and auditing experience and manages over 40 audits annually, including several municipal and international airports. He oversees 11 annual Comprehensive Financial Reports. Scott is a Certified Public Accountant in Massachusetts and a frequent presenter for the New England Government Finance Officers Associations, the Massachusetts Municipal Accountants and Auditors, New Hampshire, and Vermont Government Finance Officers Associations. He is also a Massachusetts Society of CPA Governmental Committee member. He speaks on a variety of topics ranging from new GASB pronouncements to single audit requirements.

**Chris Morrill - presenting Talent Attraction and Retention in the Government Workforce***Monday 3:45-4:45pm*

Chris Morrill is well known to the municipal finance community as the Executive Director/CEO of the Government Finance Officers Association (GFOA) of the US & Canada, a 22,000+ member professional association that advances excellence in government finance to build thriving communities. He has extensive experience in local government, serving as City manager of Roanoke, VA, and Assistant City manager and Budget Director for the City of Savannah, GA, a budget analyst for Catawba County, NC and downtown project manager for Lynn, MA. Chris served as a senior Municipal Finance Advisor to the South African national Treasury under a US Agency for International Development project, where he assisted the South African government with developing local finance legislation, municipal budget reforms and capacity building programs. Chris holds a BA from the College of the Holy Cross and an MPA from the University of North Carolina at Chapel Hill.

**Lisa Parker - presenting GASB Update***Tuesday 3:00-4:30pm*

Lisa is a Senior Project Manager with the Governmental Accounting Standards Board (GASB). Prior to joining GASB in 2008, Lisa worked for Runyon Kersteen Ouellette CPAs, the Town of Old Orchard Beach Maine as Finance Director and Interim Town Manager, the City of Saco Maine as Finance Director. Lisa is a CPA and a Chartered Global Management Accountant. She is a member of the Association of Governmental Accountants, the American Institute of CPAs and the Maine Society of CPAs, also having served as their President. Lisa served as President of the Maine GFOA, was a member of the NESGFOA Executive Board and a member of a GFOA standing committee. Lisa attended Boston College and the University of Southern Maine, graduating with magna cum laude honors and a BS in Accounting.

**Naomi Petley, Maine Emergency Management Association - presenting FEMA Update***Tuesday 10:15-11:15am*

Naomi Petley is the Public Assistance Officer for the Mitigation, Planning and Recovery Division at the Maine Emergency Management Agency. FEMA's Public Assistance Program provides financial assistance to eligible applicants for costs incurred for response and recovery activities as a result of a declared emergency or disaster. Naomi's role is to help facilitate eligible applicants through the federal declaration process under FEMA's Public Assistance Program. She has participated in 8 federally declared events during her tenure with the Agency and overseen \$400 Million dollars in funding to eligible applicants.

**Amanda Rector, State of Maine - presenting Economic Update***Monday 2:45-3:45pm*

Amanda Rector is the State Economist for Maine. In this capacity, she conducts ongoing analysis of Maine's economic and demographic conditions to help inform policy decisions. She joined Maine state government in 2004 and has served as State Economist since 2011. She earned a BA in Economics from Wellesley College and a Master's in Public Policy and Management from the Muskie School of Public Service at the University of Southern Maine.

Amanda holds membership on the State of Maine's Revenue Forecasting Committee, the advisory board for the New England Public Policy Center at the Federal Reserve Bank of Boston, and the Board of Visitors at the Muskie School of Public Service. She also serves as the Governor's liaison to the U.S. Census Bureau. Amanda is originally from mid-coast Maine and now lives in Union with her family.

**Nick Roederer, Raymond James – presenting USDA Rural Development Programs & Municipal Loan Programs***Wednesday 9:00-10:15am*

Nick Roederer has more than 25 years of experience in the public finance industry. His municipal finance practice is concentrated in non-profit and general municipal government finance for both individual issuers and nationwide lending programs. Mr. Roederer is Raymond James' lead public finance banker for the Rural Water Financing Agency, a nationwide issuer for municipal loan programs. He covers all aspects of the Agency's Loan Programs, including rating presentations, bond issuance, program management, and borrower and USDA coordination. In addition, Mr. Roederer has been the lead banker on many USDA Community Facility projects involving healthcare and higher education issuers. In total, he has been involved in the underwriting or placement of approximately \$8 billion dollars of debt for over 1,400 borrowers utilizing various USDA programs. Mr. Roederer received a Bachelor of Business Administration degree in Finance from the University of Louisville and currently holds the Series 7, 53, 50 and 63 securities licenses.

**Alexander Shih, Raymond James - presenting USDA Rural Development Programs & Municipal Loan Programs***Wednesday 9:00-10:15am*

Alexander Shih is a Managing Director in Raymond James' New York City office. Prior to joining the Firm in August 2008, Mr. Shih was a Director with UBS Investment Bank in their Municipal Securities Group for over 9 years specializing in New England region financings. Overall, Mr. Shih has 25-years of experience in the municipal industry and has executed or managed 490 bond transactions for a total par in excess of \$22.0 billion. Mr. Shih has a specialty practice working with local municipalities and agencies all throughout New England with their bonding needs. Mr. Shih received his BA degree in Economics from New York University and MBA degree from Columbia Business School where he graduated Beta Gamma Sigma. He currently holds the Series 7 and 63 securities licenses.

**Sid Vaidya, TD Bank - presenting Key Drivers of the Economy and Markets Over the next 12-18 Months***Monday 10:30-11:30am*

As the US Wealth Investment Strategist, Sid is tasked with delivering the firm's thought leadership, market views and investment strategies across all asset classes for client portfolios. He also works extensively with TD Wealth's Products group in developing the product vision for US investment platforms and solutions.

Sid joined TD in 1996 and has over twenty five years of wide-ranging experience in the North American financial services industry with proven capability in developing comprehensive investment platforms and solutions, thought leadership and channel communications, advisor training and practice management initiatives and extensive relationship management activities. Prior to taking the role as the US Wealth Investment Strategist in 2015, he was Head of Managed Investments in the Portfolio Advice & Investment Research team, where he led all investment manager due diligence and oversight functions. Sid is a member of TD's Wealth Asset Allocation Committee. He holds a Bachelor of Commerce from the University of Toronto and has been awarded the Chartered Financial Analyst (CFA) and Chartered Alternative Investment Analyst (CAIA) designations.

**Pawel Wilczynski, Baker Newman Noyes CPA - presenting Cybersecurity Landscape in 2023***Monday 10:30-11:30am*

Pawel is a manager in BNN's information systems and risk assurance practice, specializing in cybersecurity, risk, and IT systems assurance services. Clients turn to Pawel for help conducting cyber assessments, readiness assessments for major frameworks, standards and regulations: e.g.: 23 NYDSS 500, PCI DSS, ISO 27001, GLBA, NIST CSF, FedRAMP, third-party risk assessments, Merger and Acquisitions (M&A) Cyber Due Diligence and CSA STAR Attestation Level 2: For SOC 2, and all things cyber. He works with a variety of clients – both public and private – with a particular focus on financial and insurance institutions and the technology industry. His clients include financial institution services bureaus, regional banks, and software-as-a-service providers. Pawel joined the firm in 2022. Pawel has over 20 years of experience in IT, including 8 in cyber risk management and has earned a bachelor's degree in computer science, with a concentration in networking and cloud computing, from Salem State University.

## 2023 NESGFOA Board of Directors

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