



Washington
Finance Officers
Association



WFOA presents 2007 conference at the Three Rivers Convention Center in Kennewick on September 18 – 21, 2007 ...

Ensure that Your Agency is Adequately Financial, Auditing, Reporting, Planning, and Performance Informed

WFOA is pleased to provide you Opening /General Session Speakers each morning. In addition, we have also included some of the equally talented national level and statewide speakers who are scheduled to provide these educational opportunities at our conference.

Wednesday, September 19 Conference Opening Speaker

Creating New Opportunities by Redefining the Future

David A. Goldsmith, Wednesday Keynote Speaker, is one of the world's leading ***Business Forecasters and Leadership-Management Expert***. David is a consultant and professional speaker, whose speaking career spans 20 years. Popular speaking topics include: change management, strategic planning, technology, leadership, marketing, technology, new product development, and customer service.

In the category of ***Strategic Business Management Expert***, our speaker was selected one of the 26 hottest speakers in the industry. The list was last generated in 1999 and now again in 2006. David's past has been highlighted with awards including the prestigious honor of **The Citizens Foundation Central New York Entrepreneur of the Year**. David's accomplishments have appeared in written media around the world, including the Japanese version of ***Entrepreneur Magazine*** and the ***Financial Times of London***.



Born and raised in Middletown, NY, David has studied at Fairleigh Dickinson University and Orange County Community College. He received a Dual Major with a B.S. in Biology and a B.S. in Psychology at Syracuse University. David graduated as a member of the Alpha Epsilon Delta pre-med honor society, and also as a member of the psychology honor society Psi Chi. Upon graduation, he chose a business career rather than entering the medical profession, and received his MBA from Syracuse University.

Thursday, September 20 Conference Opening Speaker

The Beginning of the End or the End of the Beginning?

John W. Mitchell, our Thursday Keynote Opening Session Speaker, is U.S. Bancorp's Economist, Western Region, and the principal of M & H Economic consultants. Prior to joining U.S. Bancorp, he was a professor of economics at Boise State University for 13 years. He was Chief Economist of U.S. Bancorp from July 1983 to July 1998. He writes ***U.S. Bank's Economic Update***, a bi-monthly in-house review.



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Thursday, September 20 Conference Opening Speaker (Cont.)

John Mitchell is a member of the *Western Blue Chip* Forecast Panel, a Trustee of Aquila Tax Free Trust of Oregon and a board member of Oregon Mutual Insurance Company. He was Chairman of the *Oregon Governor's Technical Advisory Committee on Tax Review* and Chaired the Life Flight Consortium. He is a past President of the Portland Chapter of the *National Association of Business Economists*. He received his B.A. degree from Williams College and his M.S. and Ph.D. degrees from the University of Oregon.



Friday, September 21 Conference Opening Session



"I – Contact" It is all About You! The Solution for Great Customer Service .

There is no question how important our customers are to our success. There also shouldn't be any question about how important our employees are to our success. Our instructor uses true life, humorous anecdotes to punctuate this philosophy. **Michael Meines** began teaching customer relations for the military in 1988 and expanded his program to include government agencies and civilian corporations upon his retirement.

In 1998, Mr. Meines was appointed the Director of the Army Medical Department's Center of Excellence for Customer Relations by the then Surgeon General of the Army, LTG Ronald Blanck. He created and developed a Customer Relations program for the entire Army Medical Department . He conducted courses in Germany, Japan, Korea and throughout the United States.

MEET THE OTHER SPEAKERS

Frank Crawford is President of Crawford & Associates, P.C., CPA, an accounting firm located in Oklahoma City, Oklahoma, that specializes in providing auditing, consulting and accounting services solely to governmental entities. Over the last 23 years, Crawford & Associates has provided a variety of audit and accounting services to all sizes of government, including, but not limited to many types of financial audits and attestation services, planning and executing **GASB 34** implementation plans, fraud investigations, internal control analysis, accounting policy and procedure development, contract internal auditing and internal monitoring, the development of management anti-fraud programs and controls, quality assurance reviews, training, capital asset record development and expert witness testimony. Mr. Crawford will be discussing the **New Audit Standards: Effects on Local Government Finance Departments** and how each of us will be affected and its impact on the day-to-day operations of local government finance departments. How will the changes of how an auditor "audits" and what the auditor is looking for?





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Michael Bushmohle trains people around the world to write, speak, and meet confidently. He's an author, artist, speech writer, and speech coach (whose clients have been on **Oprah**, **Good Morning America**, and the **Today** show). He conducts multiple classes for various multinational companies, associations and teaches MBA communications courses in China. He was actually selected by the organizers of the **2008 Olympic Games** in Beijing to teach them communication techniques. He's a former hospital training director and a former Roman Catholic priest and retreat master. His session on **Write, Speak and Meet Like a Pro** will present the latest professional communication tips and techniques for government leaders and officials on persuasiveness, composure in handling conflicts and complaints, and planning productive meetings.



Tom Gould is the Vice President and the National Technical Director of Finance and Rates at HDR Engineering, Inc. (HDR). He has a strong background in organizational management, and has worked extensively with all levels and areas of utilities. Tom is currently an instructor for the **American Water Works Association (AWWA)** three-day Financial Management Seminar. He is a contributing author of the **AWWA-M1 Manual** on setting cost-based water rates. Mr. Gould is also an instructor for the **American Public Power Association (APPA)** and the **Northwest Public Power Association (NWPPA)**. Mr. Gould will provide us a two-hour session in how to provide **Effective Public Presentations – As Simple as Assembling Legos™!** Effective public presentations do not just happen. They are a combination of detailed planning and presentation style. In addition, he will also provide **“Presenting Information to Decision Makers”**, **“Working Successfully With Community Groups and Advisory Boards”** and **“Setting Rates and Fees To Fund Replacements”**.

Connie Poulsen is the Director of Leadership and Management Education at Peninsula College in Port Angeles, Washington. She came to the college from a 30 year career at **Xerox Corporation**. During her years at Xerox, Connie was responsible for the management of sales and profit as District Manager of Los Angeles. She also held the positions of Western Region Training Manager, responsible for sales and management training in the western U.S. and Manager of Customer Education for the United States, where her organization developed and delivered training for customers. Her last position with Xerox was Manager, Education Industry Marketing in which she had worldwide responsibility for marketing programs in the university sector. At the conference Ms. Poulsen will discuss **“Strategic Planning”** Pre-Conference session.





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Deanne Woodring is an Investment Advisor for Davidson Fixed Income Management and a Financial Consultant for D.A. Davidson & Co. Her focus is on providing investment advice to public entities including States, Counties, Cities, and Special Districts. Over the past twenty five years Deanne and her team have worked to develop, refine, and implement their “Portfolio Benchmark Strategy” which enhances the safety and liquidity of their existing portfolio while stabilizing its returns over long term time horizons. She has presented on a wide range of investment topics significant to public fund investors who internally manage their treasury and agency portfolios. She is a board member for both the **Oregon Short Term Fund Board** and **Davidson Fixed Income Management**, as well as a member of a number of local and national investment organizations. She will discuss the “**Investment Program Fundamentals**” at the conference.

Bill DeRousse has been a Fleet Manager for 37 years with experience in both private and public fleet operations. He is currently the Fleet Manager for the City of Everett and Everett Transit, serves as the information officer for the Public Fleet Managers Association, and serves as a committee chair with the Seattle chapter of NAFA. He has been appointed by the **Governor of Washington State** to the Governor's Safety and Health advisory board, a **Trustee** with the **University of Washington's** engineering division, Technical advisor for a local Community Environmental Response Cooperative and serves on several national transit and vehicle committees. Mr. DeRousse has conducted multiple presentations throughout the United States in all areas of fleet management. He will share his fleet operation processes and best maintenance practices at **Fleet Management** with Peter Moy and Jay Rogers, speakers.



Jos Smith, a communication consultant, has twelve years of training/consulting experience and a degree in communication. He launches productivity and effectiveness presentations and trains organizations throughout the United States empowering teams with communication principles and technical skills. He consistently receives rave reviews from conferences commonly noted as exceeding everyone's expectations. He had conducted multiple classes throughout the United States and Canada.

Mr. Smith will share his expertise in “**Technology Lab: The Cosmic Hat of Wisdom and Microsoft Office**”, **Developing Skills to Be A Tactical Trainer**’, and “**Teamwork Is Not An Option, It's An Absolute!**”.



Dina O'Reilly has more than 10 years experience in project management, coordination and facilitation. She utilizes her extensive experience and highly developed skills in public communications to facilitate meetings, training sessions, and workshops within HDR Engineering, Inc. (HDR) offices and with external clients. Recent experience includes assisting municipal agencies in master planning, strategic planning, budgeting, organization and benchmarking. She will be discussing the sessions on **Understanding Engineers 201** and **Effective Public Presentations – As Simple as Assembling Legos™!**

Mark Evans, CFA, is currently the Executive Vice President and Director of Investment Strategies, a group that provides research and technical assistance to the firm's customers and sales representatives. He has specialized in servicing the needs of institutional fixed income investors. Mr. Evans has written research reports on fixed income securities, portfolio management, leveraging strategies, and regulatory issues. He has also written articles for numerous trade publications and serves on the editorial board of *Bank Asset/Liability Management*. In addition, he has developed many analytical models for analyzing fixed income securities and bank investment portfolios. He will discuss **"Relative Value Analysis"** and **"US Agency Market Update"**.



Geoff Urbina is a Vice President and an investment banker for A.G. Edwards - Northwest Public Finance Office. Mr. Urbina focuses on investment banking, capital finance, and bond underwriting services to states, counties, cities, school districts and utilities within the Northwest region. With over eight years of public finance experience in the Pacific Northwest, he has completed numerous financing projects with the combined value of more than \$6.2 billion and has provided financial advisory services on over \$1 billion worth of projects. Mr. Urbina typically delivers presentations in the area of capital finance on a wide variety of topics in Alaska, Oregon and Washington. At this year's WFOA 2007 conference he will provide sessions on **"Refunding 101"** and **"Financing Engineering And Bond Pricing"** and will coordinate the **"Counties' Roundtable"**.

Joe Delaney, CPA, CGFM, CDY, is Interim Finance Director for the City of Tacoma and a former Senior Associate at the **University of Georgia's Institute of Government**. During his tenure at the Institute, he served as a program director, instructor, and consultant to the State and local government financial certification programs. He received his Masters Degree in Organizational leadership from Gonzaga University. He has more than 25 years of governmental audit and accounting experience, and has authored numerous Institute, national, and international training programs on government related topics. Mr. Delaney is currently a Board Member for the **Washington Finance Officers Association** and **Washington Society of Certified Public Accountants**. Joe is also an author and technical editor for select **MicroMash** publications. To prove that not all CPAs are hopeless bean counters, he is also a licensed commercial helicopter pilot who enjoys snow skiing, scuba diving, raising shellfish, and Black Dog Ale.





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Peter Moy is the Principal and Management Consulting Program Director at FCS Group in Redmond, Washington. He has over 30 years of experience working with public sector clients. Besides cost of service and user fees, Mr. Moy's expertise and experience includes indirect cost allocation, performance auditing, organizational analysis, rates for ambulance, fleet, and information technology services, revenue and expenditure forecasting and analysis, and financial impact analysis of annexations and development projects. He has served as a member on **King County's Financial Policies Advisory Task Force**, the Vice Chair of the **Seattle Housing Authority Board**, and the associate member on the **Board of the Washington Association of Sewer and Water Districts**. At the conference, he will discuss "Setting Up An Ambulance Utility/EMC Rate", and Mr. Moy, Mr. Derosse and Mr. Jay Rogers will be speaking on how to identify the cost of service and determine rates for a "**Jurisdiction's Fleet and Equipment Services**".



American Payroll Association's national "**Government Partner**" awardee's **Timothy Beard** is the Employer Services Liaison Officer in Social Security's Seattle Regional Office. He is responsible for assisting employers throughout the Northwest with the completion of annual W2 reports, whether electronic or on paper and resolving problems related to those reports. In addition, Mr. Beard is the regional expert on issues regarding the Social Security and Medicare coverage of state and local government employees, especially via the Section 218 agreements. Mr. Beard has worked for the Social Security Administration since 1973, the last seventeen years specializing in annual wage reporting and employment taxes. In his undertakings, he was recognized in multiple occasions with special awards and citations from various organizations. He will be explaining, "**It's All About the Money: Social Security and Your Future!**" at this year's conference.

Chuck Pfeil is a Deputy State Auditor and Director of Local Audit with the **Washington State Auditor's Office**. In his role he manages 15 audit teams, which perform financial, single and accountability audits of over 2,400 local governments and all public colleges and universities. Mr. Pfeil has been with the State Auditor's Office for 27 years and has previously served as Director of Administration as well as Assistant Director for State Agency Audits. Prior to joining the Auditor's Office, he worked in the financial and merchandising divisions of Nordstrom. He serves on the board of the **Washington Finance Officer's Association**. He was formerly the president of the **Olympia Chapter of Washington Society of Certified Public Accountant (WSCP)** and was a board member of the **Olympia Chapter of Association of Government Accountants**. Mr. Pfeil is a graduate of the University of Washington and has completed the Executive Management Program through the University of Washington Evans School of Public Affairs. Mr Pfeil will discuss "**Performance Audit & Measurement**" at the pre-conference and facilitate the "**SAO Roundtable**".





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Jan Jutte, CPA, CGFM, CPT, is the Director for Legal Affairs for the **Washington State Auditor's Office**. In her role as the point person for sensitive legal issues, she works with audit staff on compliance and other legal issues; she works with audit divisions to ensure a consistent audit approach for those sensitive legal compliance issues; she is the point of contact for municipal attorneys who have questions; and she is the liaison to the **Attorney General's Office** on behalf of the State Auditor's Office. Ms. Jutte was the Deputy Director of Local Audit and provided leadership and guidance to the 14 local audit teams so that audit coverage and reporting of results were consistent statewide. She is an internationally recognized speaker in public accountability, generally accepted accounting principles for government and generally accepted governmental auditing standards. Ms. Jutte will discuss "**Performance Audit & Measurement**" at the pre-conference and facilitate the "**SAO Roundtable**".



Wesley A. Galloway is a project manager at the **Governmental Accounting Standards Board (GASB)** in Norwalk, Connecticut. He serves as the GASB liaison to national organizations for business-type activities and higher education and is a noted speaker on GAAP for governments. Since joining the GASB staff in 1996 Mr. Galloway has worked on numerous projects, including Statement 34 and the implementation guides, and the recently released Statement 49 for pollution remediation obligations. Prior to joining the GASB staff Mr. Galloway served in the **Washington State Auditor's Office**. Mr. Galloway is a graduate of Brigham Young University. At the conference, he will share his expertise in "**GASB Update**".

Stan Finkelstein is enjoying his 34th year of service at the Association of Washington Cities and his 17th year as executive director. As executive director, Stan represents cities in the areas of legislative advocacy, technical assistance, employee benefits, and property/liability insurance coverage for member cities. In addition, he is a frequent presenter on municipal finance issues and serves as an adjunct faculty member for the graduate program in **Public Administration** at **Seattle University**. At the conference, he will discuss the **2007 Legislative Issues**.



Jeff Thomas, Assistant Vice President, joined **Moody's Investors Service** in October 1998. He is a member of the West Regional Team and is the lead analyst for the states of Washington, Nevada and Utah. In his role, he covers a broad range of credits, including cities, counties, water and sewer districts, redevelopment agencies and electric utilities. Mr. Thomas has a Business Administration in Political Science from Northwestern University. He will discuss the "**Bond Rating: the Nuts & Bolts**".



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Lindsay Sovde, Vice President, joined Seattle-Northwest Securities Corporation in 1999 to focus on structuring bond issues for municipal governments in the region and has been the lead banker on bond issues for a variety of jurisdictions in Washington, such as the cities, counties, hospitals, utilities, ports and other local governments. Ms. Sovde has been active both as a financial advisor and an underwriter for issuers in the region. This broad base of experience has given her a substantial understanding of how to structure bond issues, maximize credit ratings, make the best use of bond insurance, and analyze various methods of securing bond issues to achieve an issuer's financing goals. She also has her Series 7 license, and serves on the boards of directors of **Make-a-Wish Foundation of Washington, Northern Idaho and Alaska**; **Ronald McDonald House Charities of Western Washington and Alaska**; and **Seattle-Northwest Securities Corporation**. She will discuss "**GASB 45 – Post Employment Benefits**".

Christopher Morgan is an Associate in the State and Local Government group at **Standard & Poor's Credit Market Services**. Based in San Francisco, Mr. Morgan serves as a charter school sector leader and conducts credit analyses for local government issuers throughout the Western U.S., including cities, special taxing districts, and school districts. A native of Seattle, he has authored articles on municipal credit trends in Washington State and focuses on the state as part of his analytical practice. Prior to joining Standard & Poor's, Mr. Morgan analyzed housing and commercial markets as a consultant to local governments and nonprofits, and evaluated real estate locations and market strategies for retail firms. He holds a Master of City Planning from U.C. Berkeley and B.A. in geography from Macalester College. Mr. Morgan will speak on "**Bond Rating: the Nuts & Bolts**".



Managing and consulting for over 20 years, **Cil Pierce**, Senior Project Manager for HDR Engineering Inc., has extensive experience in cost of service studies, rate design, capital and financial planning, funding and policy analysis for public works departments, utilities of small to large municipalities, non-profit organization and state organizations. As Senior Project Manager and Financial Analyst, her experience includes financial, technical, environmental analysis and planning. Throughout her career, Cil has provided numerous presentations in an organized, value-added and effective style to the public, colleagues and elected officials. Her experience in both the public and private sectors provide her with broad-based experience to share in managing funds efficiently, successful financing for projects, and effectively presenting technical information. For this year's conference, she will be presenting "**Successful Financing For Capital Projects**" for the Pre-conference, "**Current Policy Issues of Rate Setting**", "**Presenting Information to Decision Makers**", and "**Managing For Results: Maximizing Revenue and Minimizing Expenses**".

Jim Justin is the Assistant Director for Intergovernmental Relations with the **Association of Washington Cities**. He manages the Association's legislative program and serves as the lead lobbyists in the areas of municipal finance and taxation, insurance issues, and personnel and labor relations. Mr. Justin has been with this jurisdiction for over 20 years and has served as the Assistant Director for Operations prior to his legislative responsibilities. He has also managed the Insurance Services Program and was formerly the Association's conference planner. He is the current President of the Olympia School District Education Foundation. He is a past member of the Centennial Elementary School Site Council and the Washington Middle School Site Council. Recently honored by **Olympia School District** as their Volunteer of the Year, he is a 5-year member of this school district's Budget Advisory Group. His service of the community's educational needs is a natural given trait with his blended family and 7 children. Mr. Justin will present "**Streamlined Sales Tax**."





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A special thank you goes also to the following speakers who are participating to our 2007 conference:

Aaron Meilleur

Ben Floyd

Bill Angle

Brian Berghoff

Carol H. Parvey

Cheryl Grant

Chris Gonzalez

Clark Fletcher

Connie Rivera

Craig Stampher

Daniel B. Edds

Dan Underwood

Denise Mellene

Duane Walz

Elizabeth Green-Taylor

Erika Jennings

Frank Thoen

Gordon Wilson

Hugh Spitzer

Jay Rogers

Jennifer Forsberg

Jodie Trueblood

John Ghilarducci

Judy Andrews

Julie Murray

Lorrie Brown

Lucy Liu

Mark Neary

Michael Blatman

Michael Hodge

Naomi G.Keck

Noah Crocker

Pat Mason

Roy Cross

Samantha Holert

Sandy Langdon

Scott Woelfle

Sharon De Haan

Stacey Crawshaw-Lewis

Steve Gorcester

Thomas Fox

Timothy C. Morris

Toni Nelson

Victoria Erickson

Wendy Kancianich

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