



UGFOA SPRING CONFERENCE

April 8-10, 2024

THE “WINS” OF CHANGE

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**THANK YOU FOR
ATTENDING THIS
YEAR'S CONFERENCE.
WE HOPE YOU ENJOY
THE CONFERENCE AND
ST. GEORGE!**



GENERAL CONFERENCE INFORMATION



WELCOME TO ST. GEORGE

This program guide is designed to assist you with logistical information as well as daily session and event schedules. The UGFOA Board is available to assist with any questions you may have over the next few days.

Thank you for your participation, and we hope you enjoy the Conference!

REGISTRATION HOURS

DELEGATES: Check-in begins on Monday April 8th from 7:15 a.m. to 8:00 a.m. in front of Ballroom A. This area will be staffed during the early hours of Monday for delegates and presenter check-in. In order for our board members to attend the sessions, we will not be permanently staffing the registration desk. If you arrive and nobody is at the desk, please look for a board member inside. (You can see their mugshots in this packet if you don't know who they are.)

VENDORS: Check-in is on Monday, April 8th with the registration desk located in front of Ballroom E. Board members and other staff will be available beginning at 7:15 a.m. and available throughout the morning although you may have to find one of them just inside the ballrooms after the sessions have started.

NAME BADGES

Name badges will be issued to delegates and vendors at their respective registration desks. Name badges must be worn to be admitted to the conference sessions, meetings, and meals. Please make sure your badge is accessible. This is a great opportunity to also network with fellow delegates.

EVALUATIONS

Your feedback is important to us and will assist with making improvements to future conferences. Check your email following the conference for a link to the conference evaluation. Once completed, you will be provided a link to download your CPE certificate.

MEALS

The following meals have been included with the delegate conference registration. Meals will be served at the Dixie Center (just outside of the ballrooms) with seating in Ballroom A & C.

Breakfast:

Monday: 7:15 am - 8:00 am
Tuesday: 7:30 am - 8:00 am
Wednesday: 7:30 am - 8:00 am

Lunch:

Monday: 11:45 am - 12:30 pm*
Tuesday: 11:50 am - 1:00 pm

**Those who have registered for golf will be provided a box lunch at Sunbrook Golf Course.*

Beverage Station:

A beverage station will be available during the conference inside the vendor hall (Ballroom E).

CONFERENCE CENTER LAYOUT

Not sure where to register or find breakout sessions? Please see the Dixie Center Floor Plan located on page 11.

GENERAL CONFERENCE INFORMATION



SOCIAL EVENTS

As an association, we want you to enjoy your time at the conference as well as take in the beauty of Southern Utah. Conference social events have been planned for Monday afternoon, including an 18-hole golf tournament at Sunbrook Golf Course, mountain biking, or hiking in Snow Canyon State Park. If you have not signed up for an event or would like to change your registration, please let a board member know when you pick up your badge at the registration table.

work &
play

VENDOR HALL

Please take the time to visit with our sponsors located in Ballroom E adjacent to the main conference room. The Vendor Hall is intended to provide an opportunity for you to view products, ask questions, and see demonstrations of products and services that add value to your organization.

Hours:

Monday: 8:00 am - 12:00 pm
Tuesday: 7:30 am - 5:00 pm
Wednesday: 7:30 am - 11:00 am

CELLULAR PHONES - CHARGING STATIONS

As a courtesy to our speakers and attendees, please turn off your cell phone or turn to vibrate during conference sessions. If you must take a call, please step outside the ballrooms so as to limit disruption. Charging stations will be located on each set of tables in the main conference Ballroom.

SPEAKER SLIDES AND HANDOUT MATERIALS

The board expresses its gratitude to the many speakers and presenters who make this conference possible. Many are here outside of their daily work schedules to bring you the best, most up-to-date information from their areas of expertise. Where possible, speaker presentations and materials will be made available on the conference web-page following the conference.

thank
you!

Last but not least, your participation in UGFOA and the 2024 Annual Spring Conference is what makes this event a success. We hope you will take full advantage of the great presentations, networking, and sponsor exhibits, and don't forget to **SAVE THE DATE** to join us again at our 2025 Conference which will be from March 31, 2025 - April 2, 2025 at the Dixie Convention Center here in St. George.



CONFERENCE AGENDA AT A GLANCE

MONDAY, APRIL 8, 2024

7:15 am - 8:00 am	REGISTRATION AND BREAKFAST	LOBBY
8:00 am - 8:20 am	FLAG/OPENING CEREMONY AND REMARKS	BALROOM A & C
8:20 am - 9:50 am	RELENTLESSLY RESILIENT - LEARNING HOW TO LIVE (AND WORK) HAPPILY EVEN AFTER, <i>Jennie Taylor</i>	BALLROOM A & C
9:50 am - 10:15 am	BREAK AND SPONSOR PASSPORT	BALLROOM E
10:15 am - 11:45 am	ECONOMIC UPDATE, <i>Robert Spendlove</i>	BALLROOM A & C
11:45 am	DISMISS FOR LUNCH AND SOCIAL EVENTS	LOBBY

TUESDAY, APRIL 9, 2024

7:30 am - 8:00 am	BREAKFAST	LOBBY
8:00 am - 9:00 am	GFOA UPDATE/RETHINKING FINANCIAL REPORTING, <i>Chris Morrill and Laura Allen, GFOA</i>	BALROOM A & C
9:00 am - 10:40 am	COMMON SENSE IMPROVEMENTS TO THE BUDGET PROCESS, <i>Brian Elms</i>	BALLROOM A & C
10:40 am - 11:00 am	BREAK AND SPONSOR PASSPORT	BALLROOM E
11:00 am - 11:50 am	COMMON SENSE IMPROVEMENTS TO THE BUDGET PROCESS, <i>Brian Elms</i>	BALLROOM A & C
11:50 am	LUNCH AND DESSERT WITH SPONSORS	LOBBY
Session 1 1:00 pm - 1:50 pm	LEGISLATIVE UPDATE FOR CITIES, <i>Jared Tingey, Legal Director, ULCT</i> LEGISLATIVE UPDATES FOR SPECIAL DISTRICTS, <i>LeGrande Bitter, UASD</i> LEGISLATIVE UPDATE FOR COUNTIES, <i>Brandy Grace, CEO, UAC and Curtis Koch, UAC President and Davis County Auditor</i>	BALLROOM A & C SUNBROOK A & B SUNBROOK C
Session 2 2:00 pm - 2:50 pm	RETHINKING FINANCIAL RESERVES, <i>Chris Morrill, GFOA and Andrew Reed, Salt Lake City</i> PROPERTY TAX UPDATE, <i>Jennifer Hansen and Matthew Hurst, USTC</i>	BALLROOM A & C SUNBROOK A & B
2:50 pm - 3:10 pm	BREAK AND SPONSOR PASSPORT	BALLROOM E
Session 3 3:10 pm - 4:00 pm	SALES TAX UPDATE, <i>Scott Stevens and Cai-Peng Guan, USTC</i> INTERNAL AUDIT FOR LARGE AND SMALL ENTITIES, <i>Calvin Bergmann, Internal Audit Manager, Utah County</i>	BALLROOM A & C SUNBROOK A & B
Session 4 4:10 pm - 5:00 pm	CASH FLOW, <i>Jason Williams</i> CIP BEST PRACTICES, <i>Rudy Livingston, Chief Deputy Auditor, Utah County</i>	BALLROOM A & C SUNBROOK A & B
5:00 pm	DISMISS FOR EVENING ACTIVITIES	

WEDNESDAY, APRIL 10, 2024

7:30 am - 8:00 am	BREAKFAST	LOBBY
8:00 am - 8:20 am	UGFOA BOARD MEETING	BALLROOM A & C
8:20 am - 9:10 am	GASB UPDATE, <i>Joel Black, GASB Chair</i>	BALLROOM A & C
9:10 am - 10:00 am	AUDIT UPDATE, <i>Seth Oveson, Utah State Auditor's Office</i>	BALLROOM A & C
10:00 am - 10:20 am	BREAK AND SPONSOR/PASSPORT DRAWINGS	LOBBY
10:20 am - 12:10 pm	ETHICS, <i>Greg Kyte</i>	BALLROOM A & C



MONDAY, APRIL 8, 2024

7:15 am - 8:00 am

DELEGATE REGISTRATION & BREAKFAST

GENERAL SESSION

8:00 am - 8:20 am

WELCOME

Heidi Voordeckers, MPA, CGFM, UGFOA President
Presentation of Colors, Dixie High AFJROTC
Pledge of Allegiance, Jessica Hardy
Mayor Michelle Randall, City of St. George

8:20 am - 9:50 am

KEYNOTE SPEAKER - JENNIE TAYLOR

Jennie Taylor joins us as this years conference key note speaker to inspire us to appreciate the value of community support, and the healing that can be found when moving forward with a conviction to find hope and happiness in spite of life's heartache and pain. She is a highly sought-after motivational speaker for topics such as resilience, grief, patriotism, military service, family dynamics, and living a purposeful life. She has spoken across Utah, in California, Arizona, Georgia, Manhattan, and Washington, DC. Jennie has been interviewed by Time Magazine, Fox News, CNN, NBC's Today Show, and more. A high school teacher with a Masters in Education by trade, Jennie is also the mother of seven children, ages 4 to 16, and the Gold Star Widow of Utah Army National Guard Major Brent Taylor.

9:50 am - 10:15 am

BREAK-VENDOR HALL

10:15 am - 11:45 am

ROBERT SPENDLOVE - *ECONOMIC UPDATE*

Robert is the Senior Economist for Zions Bank. In this capacity he monitors and reports on economic indicators and public policy developments for the bank. Founded in 1873, Zions Bank is Utah's oldest financial institution and it operates locations in communities throughout the Intermountain West.

During this session, Robert will provide an economic update and discuss what future year projections could look like.

11:45 am - 12:30 PM

DISMISS FOR LUNCH AND SOCIAL ACTIVITIES

Hikers and Bikers - Lunch provided at the Dixie Center

Golfers - Lunch provided at Sunbrook Golf Course

don't forget to get your
vendor passport
"stamped"!



TUESDAY, APRIL 9, 2024

7:30 am - 8:00 am

DELEGATE BREAKFAST

GENERAL SESSION

8:00 am - 9:00 am

CHRIS MORRILL AND LAURA ALLEN, GFOA, *RETHINKING FINANCIAL REPORTING*

In this session, Laura Allen, GFOA President will provide an update on current GFOA initiatives. Following this introduction, Chris Morrill, Executive Director and CEO of GFOA, will introduce current "rethinking" initiatives, including "Rethinking" Financial Reporting. From GFOA: "Local governments are in an era characterized by declining trust, increasing resource constraints, and increased risk. Part of the "rethinking" process is to ask questions and discover what is actually driving these processes and what provides value. Over time, status quo can stagnate while needs change. Similarly, we should be asking questions about financial reporting to determine if current practices are still meeting needs. For example, in a time of decreasing trust in government, we should ask if lengthy, technical financial reports that are published many months in arrears are the most effective way to build trust with government's most important constituency: citizens. In a time of declining resources, we should ask if the finance officer's time is well spent producing these reports, if, in fact, these reports are not the best way to provide accountability to the public. Government finance officers face substantial opportunity costs with their time. Time spent on general purpose external financial reports is time not spent on other forms of decision support and public engagement. For these reasons, we are now launching "Rethinking Financial Reporting."

9:00 am - 10:40 am

BRIAN ELMS, *COMMON SENSE IMPROVEMENTS TO THE BUDGET PROCESS*

The budget process is often referred to as the most consequential in government. However, many staff in government find the steps that organizations go through to create the budget as time consuming, confusing, and outdated. Worse, many approach the process as something to survive, rather than recognizing great opportunities to innovate and collaborate. Fortunately, there is a better way and all finance officers can learn simple strategies for process improvement that can be applied to your budget process. In this session, join Brian Elms in an interactive workshop to break down key components of the budget process and apply proven process improvement strategies to eliminate waste, achieve better outcomes, and become a leader (and hero) in your organization.

10:40 am - 11:00 am

BREAK-VENDOR HALL

11:00 am - 11:50 am

BRIAN ELMS, *COMMON SENSE IMPROVEMENTS TO THE BUDGET PROCESS*

11:50 am - 1:00 pm

DELEGATE LUNCH AND DESSERT WITH SPONSORS

CONCURRENT SESSIONS

1:00 pm - 1:50 PM

BREAKOUT SESSION 1

Ballroom A & C

JARED TINGEY, *LEGISLATIVE UPDATE FOR CITIES AND TOWNS*

Sunbrook A & B

LEGRANDE BITTER, *LEGISLATIVE UPDATE FOR SPECIAL DISTRICTS*

Sunbrook C

BRANDY GRACE AND CURTIS KOCH, *LEGISLATIVE UPDATE FOR COUNTIES*

In this session, local government experts representing cities, towns, counties, and special service districts will be highlighting the key legislative issues and changes passed and/or presented during the 2024 General Legislative Session.



TUESDAY, APRIL 9, 2024

CONCURRENT SESSIONS (Cont.)

2:00 pm - 2:50 PM

BREAKOUT SESSION 2

Ballroom A & C

CHRIS MORRILL AND ANDREW REED, *RETHINKING FINANCIAL RESERVES*

In this session, Chris Morrill will present on recent initiatives to assist governments with resources and strategies to apply risk-aware and risk-savvy thinking to reserves in their own organizations. From GFOA: "Governments are subject to financial shocks, including natural catastrophes, recessions, and more. Financial reserves (a "rainy day" fund) are essentially a form of self-insurance that governments use to buffer themselves against these risks. But what are the risks governments should be concerned about and what size of reserves are appropriate to cover those risks?". Andrew Reed, Financial Analytics Manager for Salt Lake City Corporation will provide additional reflection and case study information on Salt Lake City's reserve structure.

Sunbrook A & B

JENNIFER HANSEN AND MATTHEW HURST, *PROPERTY TAX UPDATE*

Join Jennifer Hansen and Matthew Hurst from the Utah State Tax Commission, Property Tax Division as they present important updates on 2024 valuation trends, legislative changes, and annual certified tax rate procedures. Learn about new growth calculations and the truth in taxation process, while gaining a better understanding of the ever-changing landscape of property taxation.

2:50 pm - 3:10 pm

BREAK-VENDOR HALL

3:10 pm - 4:00 PM

BREAKOUT SESSION 3

Ballroom A & C

SCOTT STEVENS AND CAI-PENG GUAN, *SALES TAX UPDATE & SPECIAL PROJECT AREA DISTRIBUTIONS*

Scott Stevens and Cai-Peng Guan from the Utah State Tax Commission, Sales Tax Division, will present on a wide range of insightful sales tax topics. They will examine local sales tax revenues, discuss changes to the Utah Inland Port Authority (UIPA) distribution and corresponding adjustments to county/city coding, and analyze the Utah Fairpark Area Investment and Restoration Zone, including the utilization of Zip+4 datasets. Additionally, they will provide an overview of tax reauthorizations and notifications of tax changes, as well as explore new entities and special project areas, alongside the complexity of sales tax distributions. This continues to be an attendee favorite, providing timely information on current trends.

Sunbrook A & B

CALVIN BERGMANN, *INTERNAL AUDIT FOR LARGE AND SMALL ENTITIES*

In this session, Calvin Bergmann will define the internal audit function and the critical role it plays in protecting government entities. He will explore key risks such as ghost employees, procurement fraud, and cybersecurity breaches. Last, Calvin will explain the relationship between the governing body, management, and internal audit in establishing the internal audit function and mitigating risk. This session has been designed to apply to both large and small government entities, specifically addressing those that may need to outsource this important function.



TUESDAY, APRIL 9, 2024

CONCURRENT SESSIONS (Cont.)

4:10 pm - 5:00 PM

BREAKOUT SESSION 4

Ballroom A & C

JASON WILLIAMS, *CASH FLOW*

Regardless of your role in government finance, a solid understanding of cash flow is critical to financial management. Jason Williams, CEO of Moreton Asset Management and CPFIM (Certified Public Funds Investment Manager) educator will present on cash flow forecasting, understanding liquidity, creating a reserve account, and investing. This session will roughly mirror the "Cash Flow" curriculum for the CPFIM certification program. UGFOA is excited to partner with the Association of Public Treasurer's to bring this session to you and bridge the gap between the finance and treasury functions.

Sunbrook A & B

RUDY LIVINGSTON, *CIP BEST PRACTICES*

Join Rudy Livingston, Chief-Deputy Auditor for Utah County for a deep dive into the CIP. Rudy will discuss the importance of a well-defined CIP policy, including appropriately defining what is considered a capital project. As Rudy lays out the major components of a CIP, attendees will learn how to consider multi-year projects and the importance of cash reserves. Last, attendees will be given crucial next steps in administering the CIP, developing a clear road map for effective plan administration, and key considerations when communicating the plan to stakeholders. This session will provide a deeper understanding of the overall CIP process and would benefit all who are involved with the budget process..

5:00 pm

DISMISS FOR EVENING ACTIVITIES

WEDNESDAY, APRIL 10 2024

7:30 am - 8:00 am

DELEGATE BREAKFAST

GENERAL SESSION

8:00 am - 8:20 am

BUSINESS MEETING - *UTAH GOVERNMENT FINANCE OFFICERS ASSOCIATION*

The annual business meeting of the UGFOA, where the president will present the association's finances, discuss association business, and administer the election of a new association secretary/treasurer. This meeting concludes the term of the current president, who will be recognized for their service.

8:20 am - 9:10 am

JOEL BLACK, *UPDATE ON GASB INITIATIVES*

Joel Black, GASB Chair, will provide an overview of recent activities of the GASB including current and upcoming pronouncements and emerging issues. This session will inform you of changes in recognition of compensated absences as well as new requirements for risk disclosures related to concentrations and constraints. Last, Joel will discuss proposed financial reporting model improvements and expected statement issuance.



TUESDAY, APRIL 9, 2024

CONCURRENT SESSIONS (Cont.)

9:10 am - 10:00 am

SETH OVESON, *STATE AUDITOR'S OFFICE UPDATE*

Seth manages the local government division of the Utah State Auditors Office. In this role, he oversees compliance with uniform accounting, budgeting, and financial reporting. The office also provides training and regulatory guidance to local governments. In this session, Seth will highlight upcoming projects and changes in the State Auditor's Office, as well as resources that are available to local governments.

10:00 am - 10:20 am

BREAK AND SPONSOR DRAWINGS

10:20 am - 12:10 pm

GREG KYTE, *ETHICS*

Because ethics shouldn't be painful, Greg Kyte has returned to this year's conference to present fascinating research on human ethical behavior and show us how to apply the findings in our work and organizations. As a comedian, Greg has a unique and entertaining way of making finance fun. He is a CPA, stand-up comedian, and founder of Comedy CPE. We have enjoyed his past presentations on fraud and are confident that you will laugh while you learn in this session.

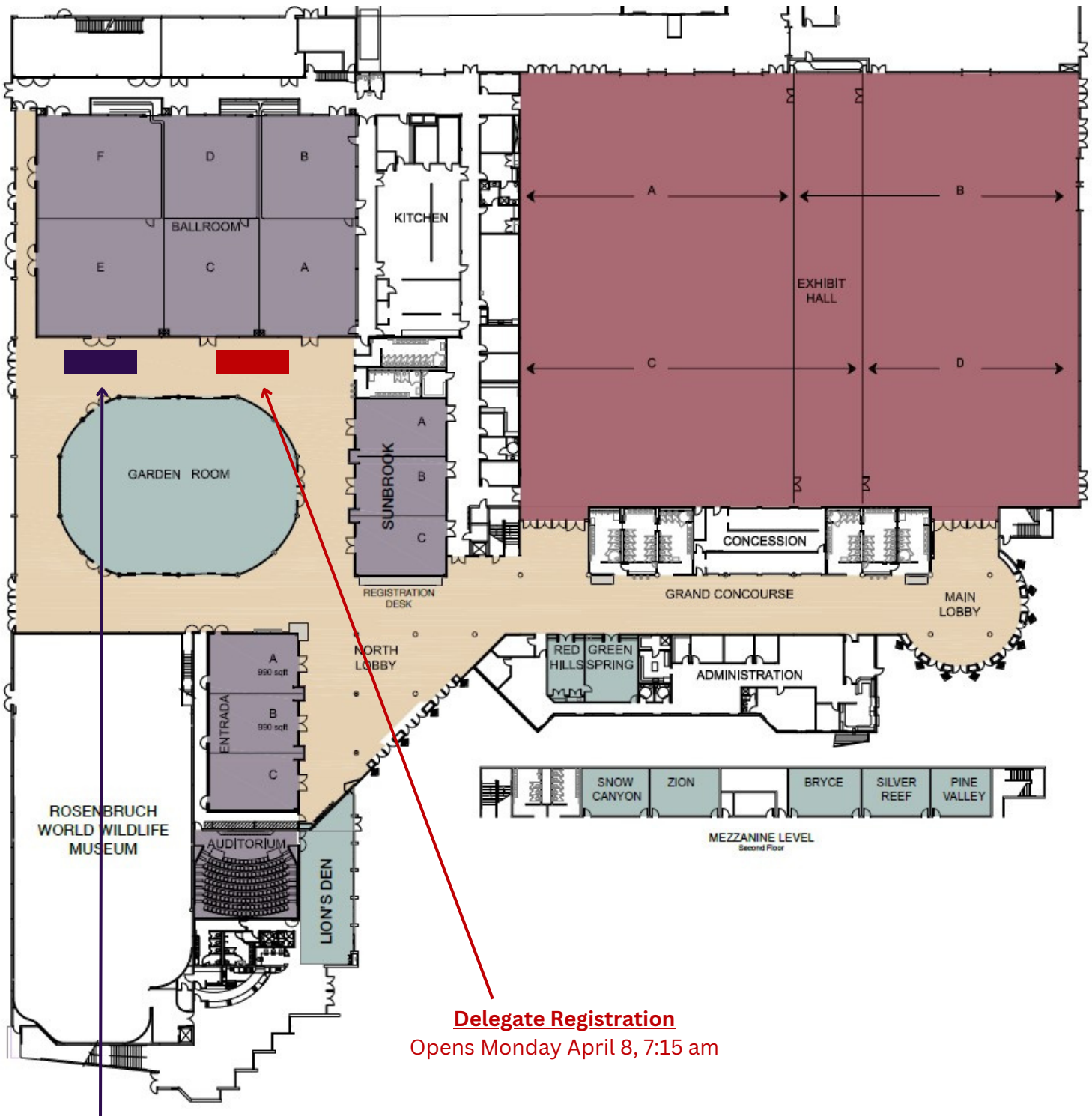
Looking for presentation materials?

Use the QR code below and scroll to the bottom, under "Documents". Or, go to <https://ugfoa.org/meetinginfo.php?id=1&ts=1712088582>.



see you
next year!

DIXIE CENTER FLOOR PLAN



CONFERENCE PRESENTERS



**Jennie
Taylor**

**Director,
Major Brent
Taylor
Foundation**

Jennie Taylor is a proud native of North Ogden, Utah. She has a bachelors degree from BYU and a Masters of Education from Utah State University. She met her husband Brent on a blind date less than a month after serving a full-time mission for the Church of Jesus Christ of Latter-day Saints (in Chile), and they were married 9 months later.

Jennie and Brent share a deep devotion to serving God, Family and Country whenever and however they can. This commitment led to 15 years of military service for Brent, including four deployments to the Middle East. Brent also served on the North Ogden City Council for four years, and as Mayor of North Ogden for five years. Brent and Jennie are the proud parents of seven children, ages 4 to 16.

In January of 2018, Brent left his position as Mayor and went to Afghanistan with the US Army for what would have been a year-long deployment. On November 3, 2018 Major Taylor was killed in action and life for the Taylor family seemed to have flipped upside down.

In the months since Brent's shocking death, Jennie has unexpectedly and frequently found herself in a position to speak out about the price of freedom, the value of community support, and the healing that can be found when moving forward with a conviction to find hope and happiness in spite of life's heartache and pain.



**Robert
Spendlove**

**Senior
Economist,
Zions Bank**

Robert is the Senior Economist for Zions Bank. In this capacity he monitors and reports on economic indicators and public policy developments for the bank. Founded in 1873, Zions Bank is Utah's oldest financial institution. It is a division of Zions Bancorporation, which is one of the nation's premier financial services companies and operates under seven separately managed and distinct brands throughout much of the western United States.

Robert's research interests are primarily in the areas of macroeconomics, demographics, financial markets and public policy. He frequently advises and briefs policymakers, as well as business and civic groups throughout the United States. He is also regularly called on to give expert analysis in the media, through print, radio, and television. He is known for his insightful and understandable approach to explaining economic trends. Robert also serves in the Utah House of Representatives, where he was elected in 2014. He represents District 42 in the Legislature, covering parts of Sandy City.

Robert is the House Vice Chair of the Executive Appropriations Committee, and serves on the Revenue and Taxation Committee, the Health and Human Services Committee, and the Public Education Appropriations Committee.

CONFERENCE PRESENTERS



**Laura
Allen**

**President,
GFOA**

Laura Allen (she/her), CPFO, ICMA-CM is currently the Budget Analyst III, Capital Budgeting, for the Maryland Department of Budget and Management. She most recently served as the Town Manager of Berwyn Heights, Maryland. Ms. Allen has over 30 years of local government experience, eleven at the executive level in California and Maryland specializing in small communities.

As a member of GFOA she has served as a reviewer for the Distinguished Budget Presentation Award program for over twelve years. Ms. Allen became a CPFO in the spring of 2012. She joined the Committee on Economic Development and Capital Planning in 2013 and became the Vice Chair in 2016. She joined the Executive Board in 2019.

Ms. Allen has presented at GFOA and ICMA conferences on topics ranging from capital planning and infrastructure to creative placemaking for small communities. She co-authored What Governments Look for in a CFO, Government Finance Review, February 2016.

Ms. Allen has a Master's Degree in Public Administration from the University of Nevada, Reno. She is a graduate of Leadership ICMA and the Senior Executive Institute (SEI) at the University of Virginia, Darden Graduate School of Business.



**Chris
Morrill**

**Executive
Director, GFOA**

Chris Morrill is the Executive Director/CEO of the Government Finance Officers Association (GFOA) of the US & Canada, a 24,000 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 the City of Roanoke, VA, and Assistant City Manager and Budget Director for the City of Savannah, GA.

Chris also served as Senior Municipal Finance Advisor to the South African National Treasury, assisting in the development of local government finance legislation, budget reforms, and capacity building programs. He was a member of the first group of Peace Corps volunteers to serve in the former Soviet Union where he assisted the City of Lviv, Ukraine with management reforms and housing privatization.

Chris is a recipient of the Southern Christian Leadership Conference (Roanoke Chapter) Martin Luther King, Jr. Drum Major for Justice Award. In 2022, he was recognized by the Association for Budgeting and Financial Management with the S. Kenneth Howard Award honoring lifetime achievement by a practitioner in the field of budgeting and financial management. Chris is an International City/County Manager Association Credentialed Manager, a Kellogg Foundation National Leadership Fellow, and a fellow of the National Academy of Public Administration. He holds a BA from the College of the Holy Cross and a Masters in Public Administration from the University of North Carolina at Chapel Hill.

CONFERENCE PRESENTERS



**Brian
Elms**

**CEO/Founder
Change Agents
Training**

Brian Elms is the author of Peak Performance and an Urban Leadership Fellow at the University of Nevada Las Vegas. He served as the Director of Peak Academy and Analytics for the City and County of Denver for more than five years. Brian specializes in government innovation and process improvement providing management expertise to government agencies, elected officials, and nonprofits.

"Irreverent, honest and straightforward," Brian is nationally recognized for sparking innovation in governments throughout the country. His work has been replicated in more than a dozen cities around the country.

Brian started his career in public service after graduating from Regis University and joining AmeriCorps as a team leader. He worked for the Governor Rendell Administration in Pennsylvania as the Policy Director for the Department of Aging. He worked for AARP as a Legislative Specialist and served as the Assistant Director of Government Affairs at Denver International Airport.

Brian is a Lean Black Belt, a certified Six Sigma Green Belt, and a Change Management Professional. In his prior role as Director of the Peak Academy, he developed curriculum, training, and consulting services that focus on employee-led performance management and continuous improvement. Since its inception in 2012, Peak Academy initiatives have saved the City and County of Denver more than \$30 million and the Academy has provided training to more than 7,000 public and nonprofit professionals.

Brian is the CEO and Founder of Change Agents Training to focus on creating employee-driven innovation programs around the country. He is currently working with more than a dozen governments to launch programs and establish meaningful innovation programs that improve the lives of employees and their clients.



**Jared
Tingey**

**Legal Director,
Utah League
of Cities and
Towns**

Jared Tingey is a practicing attorney who has spent his whole career advocating for and advising government clients in legal matters. After graduating from the University of San Diego Law School, he spent four years as a Deputy County Attorney for Duchesne County and another five years with West Jordan City as a Senior Assistant City Attorney. In July of last year, Jared became the first in-house Legal Director for the Utah League of Cities and Towns. In his role as Legal Director, he has enjoyed the wild ride of the legislative session as well as being able to regularly interact with elected officials and city staff.

CONFERENCE PRESENTERS



**Brandy
Grace**

**CEO, Utah
Association
of Counties**

Brandy Grace is the Chief Executive Officer of the Utah Association of Counties. Before joining UAC, Brandy worked for Millard County, hired as a Deputy Auditor at just 20 years old. During that time, Brandy had the opportunity to work not only in the auditor's office, but also in the treasurer, assessor, and commission offices. This provided Brandy with a deeper understanding of the roles, responsibilities, and operations of various county elected offices. Brandy later served as the elected County Auditor for almost 15 years.

In 2014, Brandy was elected by her peers to serve as President of UAC. She joined the team full-time as Director of Operations in 2016 and was appointed CEO in 2019.

A tenacious champion for county success, Brandy has worked to build value for UAC members through collaboration, education, and outreach. Her commitment to providing the best value to members is evident through additional programs that have been created that provide Utah's counties with additional resources, educational opportunities, cost-saving programs, and a strong legislative presence. She understands the value of relationships and has been diligent in establishing strong partnerships with the Governor's Office, the legislature, congressional offices, and private-sector corporate partners. Brandy has held positions on the Governor's Rural Partnership Board and the Utah Retirement Systems Membership Council and is currently a member of the Kem C. Gardner Institute's Advisory Board.

Brandy grew up on a farm in Scipio. She is grateful for her rural upbringing that taught her so much and has helped her advocate for rural county issues. She now lives in Bountiful and enjoys "city life." In her free time, Brandy loves hiking and enjoys being outdoors.



**Curtis
Koch**

**President, Utah
Association of
Counties, and
Davis County
Auditor**

Curtis earned his bachelor's degree in Business Administration from Utah State University in 2001 and his Masters of Business Administration from Weber State University in 2008. He has professional certificates from GFOA/University of Wisconsin - Advanced Government Finance Institute, The Election Center/Auburn University - Certified Elections/Registration Administrator, and the Association of Governmental Accountants - Certified Government Financial Manager.

Curtis began working for Davis County Government in 2002. He has served in a variety of positions including Assistant Director, Director of Procurement & Contracts and Chief Deputy of Audit & Finance. In 2014, he was elected to the position of Davis County Clerk/Auditor and took office in January of 2015. He is currently serving in his 3rd term as County Auditor.

Curtis is active in a variety of state and national associations, currently serving as the President of the Utah Association of Counties and Chairperson of the National Association of Counties, Finance, Pensions, and Inter-Governmental Affairs committee.

In his spare time, he enjoys skiing, running, biking, hiking and road trips with his wife and kids.

CONFERENCE PRESENTERS



**LeGrand
Bitter**

**Executive
Director, Utah
Association of
Special
Districts**

LeGrand Bitter has been the Executive Director of the Utah Association of Special Districts since 2005. Among his most important responsibilities is serving as the principal lobbyist for the Association. During the Utah General Legislative Session, he devotes many hours each week addressing a broad spectrum of legislative issues on a variety of topics, including water, taxation, governance, GRAMA, ethics, nepotism, procurement, environmental issues, fiscal procedures and requirements, and a host of other topics affecting districts. He has worked with districts for over 25 years.

LeGrand has many years of management experience, having served as an auditor, controller, CFO, and CEO of private and government entities. He has been an instructor at the college level of accounting, economics, and business management courses. He has served on several boards at state and local levels.

He has a Bachelor of Science degree in accounting from Brigham Young University and a Masters Degree in Business Administration from the University of Phoenix. He and his wife, Donita, are the parents of eight children and have twenty-eight grandchildren.



**Andrew
Reed**

**Financial
Analytics
Manager, Salt
Lake City**

Andrew Reed is a Finance Manager with Salt Lake City and has 9 years of experience leveraging financial data to help drive city strategic decision making. "My expertise includes data preparation, ensuring accuracy in reporting, and identifying trends and variances in the budget. I am trained in statistical analysis and research. I'm proficient in Microsoft Excel and have additional experience in Power Bi, SQL and R."

CONFERENCE PRESENTERS



**Jennifer
Hansen**

**Deputy
Director,
Property Tax
Division, USTC**

Jennifer Hansen is the Deputy Director in the Property Tax Division for the Utah State Tax Commission.

She has tax system knowledge in Certified Property Tax Rates, Community Redevelopment, Property Tax Statistics, and the general property tax system.

She began her career as an intern at the Utah State Tax Commission in college in 1991. She has held many positions in different divisions of the Tax Commission. She has been in the Property Tax Division since 2009. She graduated from the University of Utah in Sociology. Her hobbies include hiking, pickleball, paddle boarding, and reading Utah Tax Code.



**Mathew
Hurst**

**Standards and
Tax Rates
Manager, USTC**

Matt Hurst is the Tax Rates Manager in the Property Tax Division for the Utah State Tax Commission. He joined the division in 2007. During his time at the Tax Commission, he has appraised centrally assessed companies, helped manage data and systems of the property tax programs, and reviewed data used to calculate tax rates statewide.

Matt is a graduate of the University of Utah where he studied business. He currently lives in Sandy and in his downtime you can find him outside working or exploring our mountains.

CONFERENCE PRESENTERS



**Scott
Stevens**

**Deputy
Director, USTC**

Scott Stevens is the Deputy Director of the Financial Operations Division at the Utah State Tax Commission (USTC).

Scott most recently served as the Chief Financial Officer (CFO) of the USTC after having previously served within the commercial banking operations at Crossland Federal Savings Bank of New York. As the CFO for the USTC, Scott directed and managed the financial and accounting activities of the Utah State Tax Commission in coordination with the Executive Director and various division directors and staff.

Scott has served the Utah Government Finance Officer's Association (UGFOA) as past president and as the Utah Government Auditors Association webmaster. He also regularly presents financial information, business research, and economic analysis to the UGFOA, Utah Association of Public Treasurers, Utah Association of Counties, and the Utah Business Licensing Association.

Prior to joining the USTC and Crossland Federal Savings Bank, Scott worked for Tanner & Company; a licensed public accounting firm performing financial statement compilation and writeup services.

Scott has also presented to various classes at Brigham Young University and the University of Utah. He holds the degree of B.S. in Finance from Utah State University and a B.S. in Accounting from the University of Utah.



**Cai-Peng
Guan**

**Finance
Manager, USTC**

Cai-Peng earned her bachelor's degree in accounting from Brigham Young University Hawaii and a master's degree in accounting from Western Governors University. She recently passed the CPA exam and is studying for the CGFM exam. She did two audit internships prior to joining the Distribution Section of the Utah State Tax Commission. When not working and taking care of her children, she enjoys playing basketball and shooting targets at the range.

CONFERENCE PRESENTERS



**Calvin
Bergmann**

**Internal Audit
Manager, Utah
County**

Calvin Bergmann is originally from Pittsburgh, Pennsylvania. He moved to Utah in 2008, where he earned a bachelor's degree and MPA from BYU, and later attained his CIA credential. Calvin worked in the construction industry before attending university, and worked for BYU, the Utah State Legislature, and local municipalities during his education. He was employed in the Utah State Auditor's Local Government Division from 2017 to 2022, where he enforced local government financial reporting compliance, investigated complaints, and provided training to officials and employees. Calvin currently works as the Utah County Auditor's Office as Internal Audit Manager, where he adds value to the County by reducing risk via scheduled engagements and hotline investigations. He lives in Provo with his wife, Dezzie.



**Jason
Williams**

**President,
Moreton Asset
Management**

Jason Williams is president and managing partner at Moreton Asset Management. Moreton Asset Management is a leading fixed income portfolio manager in the west, serving institutional clients across a broad spectrum including corporations, municipalities, and credit unions located in Wyoming, Nevada, Idaho, and Utah. Moreton Asset Management has \$3.8 billion in assets under management and the portfolio management team has worked together for 20 years.

Prior to joining Moreton in 2012, Jason was a senior portfolio manager and vice president at Zions Bank Liquid Asset Management overseeing a portfolio of \$1.5 billion in fixed income securities. Jason has over 25 years capital markets experience with trading, investment policy, and fixed-income markets. Jason earned a BA in Political Science and Economics from Brigham Young University and earned an MBA from the Whittemore School of Business at the University of New Hampshire.

Jason resides in Farmington, Utah with his wife Kristi. They have three adult children. He enjoys pickleball, golf, and hiking.

CONFERENCE PRESENTERS



**Rudy
Livingston**

**Chief Deputy-
Auditor, Utah
County**

Rudy Livingston is the Chief Deputy-Auditor for Utah County. He is an experienced accounting and finance professional, having specialized in local government finance for the past 27 years. Rudy graduated from BYU with a degree in accounting and began his professional career with Deloitte and Touche in Los Angeles before spending several years in corporate tax and accounting. Rudy returned to public accounting in 1997, focusing on local government finance, and began directly working for local governments in 2003. He was licensed as a CPA in two states. He has served in two cities and Utah County, as an accounting manager, assistant CFO, deputy treasurer, investment officer, finance director, and budget manager. Rudy served for three years as a president of the California State Municipal Treasurer's Association (CMTA) and has been active in the CA Municipal Finance Officers Association, CMTA, and UGFOA for the past 14 years. Rudy presented topics at training sessions and was responsible for a CMTA annual conference.

Rudy has been married to his sweetheart, Dora, for more than 40 years and is the father of four children, with five grandchildren. He enjoys sports, gardening, and is always working on a DIY project around the house. Rudy has been active as a volunteer in scouting, youth sports, non-profits, church, and schools. He is fluent in Spanish and has been a volunteer translator for several years. Rudy loves working in local government, training others, and making a difference in our communities.



**Joel
Black**

**Chair,
Governmental
Accounting
Standards
Board**

Joel Black was named chairman of the Governmental Accounting Standards Board, effective July 1, 2020. Joel came to the GASB after almost 16 years as a partner at Mauldin & Jenkins in Atlanta where he was the partner in charge of the firm's audit practice at the time of his departure. Prior to Mauldin & Jenkins, Joel worked for 12 years at KPMG, LLP. During his experience in public accounting, he exclusively served state and local government clients leading audits and financial statement preparation engagements.

Joel previously served on the Governmental Accounting Standards Advisory Council, the AICPA's State and Local Government Expert Panel, and the executive committee of the AICPA's Government Audit Quality Center.

Joel graduated from Georgia State University and is a Certified Public Accountant.

CONFERENCE PRESENTERS



**Seth
Oveson**

**Local
Government
Manager, Utah
State Auditors
Office**

Seth Oveson earned a Masters of Accountancy at Southern Utah University in Cedar City Utah. While attending school he met his wife Melanie. He has six children and currently lives in Cedar City where he stays busy enjoying gardening, nature and supporting his children in a variety of activities. Seth's years of experience in public accounting as well as being a county auditor for 5 years help him to see issues from different points of view. He is pursuing a PhD in Business Administration with an emphasis in Accounting through Northcentral University and is passionate about helping local governments improve and serve their citizens more effectively.



**Greg
Kyte**

**Founder,
Comedy CPE**

Greg Kyte is the host of the Oh My Fraud podcast; he's a licensed CPA, and a standup comedian. Greg has been performing standup for over two decades. He opened for Weird Al Yankovic and has shared the stage with multiple former SNL cast members. And on top of all that, he is the controller for a group of medical office buildings in Provo, Utah. He currently lives in Orem, Utah, where enjoys sleeping, napping, and sitting still.

SOCIAL EVENTS

MONDAY, APRIL 8, 2024

GOLF - 18 HOLE FOUR MAN SCRAMBLE WITH A SHOT GUN START



This popular conference event at Sunbrook Golf Course is right in town and has a great variety of what the RED ROCK GOLF TRAIL has to offer. Play from the top of the bluffs to the desert floor. Shoot through black lava rock and try to avoid the red sand traps. With beautiful views of red rock formations and nearby alpine mountains, you'll be in awe over the amazing landscapes that surround this course. Bridges, water hazards, and elevation drops make every hole an adventure! All skill levels are welcome.

**MEET @ 1:00 P.M. AT
SUNBROOK GOLF CLUB:
2366 West Sunbrook
Drive, St. George**

**Pick up a box lunch in
the Clubhouse!**



MOUNTAIN BIKE - CHURCH ROCKS/DINO CLIFFS TRAIL



This ride is part of the Prospector/ Church Rocks/ Dino Cliffs trail network. It's fairly easy slickrock and singletrack riding. It has a good mix for all riders and provides some great views along the way.

**MEET @ 1:00 P.M. AT THE
TRAILHEAD AT THE CORNER OF
CROWN KING AVE. AND HIGHLAND
PARKWAY**

**Lunch will be served at the
Conference Center prior to the
event.**

SOCIAL EVENTS

MONDAY, APRIL 8, 2024



HIKE - SCOUT CAVE TRAIL

The Scout Cave trail just south of Snow Canyon State Park is a great mix of to moderate terrain. It passes over lava flow fields, stream beds, and Navajo Sandstone rocks. It is a relatively easy hike with some climbing and steps towards the cave. The trail is flat for the first mile, followed by some rocky areas/climbs. Visitors recommend good shoes for walking on lava rock. The cave itself is known for it's interesting rock formations and beautiful views of Santa Clara and Ivins.

Note that this trail is located in Snow Canyon State Park and requires a \$10/per vehicle entrance fee. Parking is limited so carpooling is strongly encouraged! A UGFOA representative will be at the entrance to pay your vehicle fee (or will reimburse you if you self-pay).

DIRECTIONS TO TRAILHEAD

From I-15 take exit 6 onto Bluff Street and head north for 3.5 miles. Turn left onto Snow Canyon Parkway and continue 4 miles. Turn right at the roundabout onto Snow Canyon Dr. and follow this road for about 1 mile. Park on the left in the Johnson's Canyon Parking Area. The trailhead will be on your right.

Please note that if you put "Scout Canyon Trail" into GoogleMaps, it will take you to the wrong trailhead, located inside a private neighborhood. Instead, look for the Johnson Canyon Parking area on Snow Canyon Drive. OR, simply use the QR Code to the right.



Lunch will be served at the conference center before the event.

MEET @ 1:00 P.M. AT THE JOHNSON CANYON PARKING AREA



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State Representative



BOARD OVERVIEW

The Utah GFOA Board consists of five (5) individuals who volunteer to serve over a five (5) year period of time in the various positions of the Board. Each year, the Board members change positions and take on different responsibilities. Serving on the Board provides individuals the opportunity to make a difference and to 'give back' to the organization and its members. If interested in serving on the Board, please contact a Board member during the year. Board nominations occur in January or February of each year.

Below are some of the responsibilities assumed by the following positions:

Secretary / Treasurer: Updates the members by e-mail of events and opportunities, organizes registrations for events, bank reconciliation, financial reporting, deposits, bill remittance.

President-Elect: Organizes the annual golf tournament, coordinates and assists the president on all events.

President: Organizes the annual conference, GAAP update, and Board meetings. Liaison for the GFOA. Attends the annual GFOA conference (sponsored by the UGFOA).

Past President: Encourages and oversees vendor relations and organizes sponsorships for the annual conference.

State Representative: Serves as the liaison for the state legislature and ULCT.

All Board members are available to organizations to present awards and recognition from the GFOA and are responsible for scholarship awards and other decisions that are relevant to the organization as a whole. The Board typically meets at least 4 times a year. Positions begin and end at the Annual Spring Conference.

POSITION	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028
Secretary/ Treasurer	Nic Hales	Jeremy Walker	To Be Ratified	To Be Ratified	To Be Ratified	To Be Ratified
President- Elect	Heidi Voordeckers	Nic Hales	Jeremy Walker	To Be Ratified	To Be Ratified	To Be Ratified
President	Jessica Hardy	Heidi Voordeckers	Nic Hales	Jeremy Walker	To Be Ratified	To Be Ratified
Past President	Brandon Nelson	Jessica Hardy	Heidi Voordeckers	Nic Hales	Jeremy Walker	To Be Ratified
State Representative	Jim Clayton	Brandon Nelson	Brandon Nelson	Heidi Voordeckers	Nic Hales	Jeremy Walker



ANNUAL FINANCIAL REPORT

Utah Government Finance Officers Association Financial Report As of December 31, 2023

	<u>2023</u>	<u>2022</u>	<u>2021</u>	<u>2020</u>	<u>2019</u>
Beginning Funds Balance as of January 1	\$ 61,514	\$ 76,562	\$ 84,152	\$ 50,268	\$ 41,566
Revenues:					
Interest Earnings	88	62	30	55	138
Membership Dues	5,525	4,700	5,550	5,050	5,375
Spring Conference Registration	28,400	27,120	15,145	20,688	27,150
Spring Conference Sponsors	30,515	24,550	7,900	21,650	27,475
Golf & Banquet Fees	440	650	55	1,140	1,150
Miscellaneous Scholarships/Donations	750				500
GFOA Fall GAAP Update	10,410	14,200	11,300	11,400	15,625
Total Revenues	\$ 76,128	\$ 71,282	\$ 39,980	\$ 59,983	\$ 77,413
Expenses:					
Golf Tournament	4,580	3,923	903	415	4,575
Spring Conference	61,421	60,073	34,359	10,587	44,201
National Conference (including Board exp)	1,540	1,805	0	0	3,461
Scholarships	1,200	300	0	0	600
Website	2,700	138	0	449	0
General Board supplies & Expenses	731	636	273	523	859
GFOA Fall GAAP Update	11,253	15,914	9,818	11,400	14,046
Professional & Technical Services	125	125	125	478	235
Bank Charges	3,525	3,416	2,092	2,248	733
Total Expenses	\$ 87,074	\$ 86,329	\$ 47,570	\$ 26,100	\$ 68,710
Ending Funds Balance as of December 31	\$ 50,568	\$ 61,514	\$ 76,562	\$ 84,152	\$ 50,268
Annual Change in Ending Balance	\$ (10,946)	\$ (15,048)	\$ (7,590)	\$ 33,884	\$ 8,702
Sec/Treas	JWalker	NHales	HVoordeckers	J Hardy	B Nelson



PAST PRESIDENTS

Term in Office

Name

2023-2024

Heidi Voordeckers: City of North Salt Lake

2022-2023

Jessica Hardy: South Davis Metro Fire District

2021-2022

Brandon Nelson: Orem City

2020-2021

Kimberly Ruesch: Washington City

2019-2020

Jim Clayton: Utah State Tax Commission

2018-2019

Shari' Garrett: Washington Terrace City

2017-2018

Kim Coleman: Granger Hunter Improvement District

2016-2017

Richard Anderson: Logan City

2015-2016

Paul A Jerome: Eagle Mountain City

2014-2015

Sunil Naidu: South Jordan City

2013-2014

Dean Lundell: Pleasant Grove City

2012-2013

Danyce Steck: Draper City

2011-2012

Lisa Dudley: Riverton City

2010-2011

Galen Rasmussen: Bountiful City

2009-2010

David Muir: Cottonwood Heights City

2008-2009

James Welch: West Valley City

2007-2008

Scott Stevens: Utah State Tax Commission

2006-2007

Kent Clark: Spanish Fork City

2005-2006

Laurie Harvey: Midvale City

2004-2005

John Bond: Weber County

2002-2003

Jeff Pedersen: Orem City

2000-2001

John Arrington: Ogden City

1998-1999

Mark K Anderson: Heber City

1996-1997

Philip R Peterson: City of St George

1994-1995

Steven M Ashby: Layton City

1992-1993

Harley R Hales: Vernal City

1990-1991

David Sanderson: West Jordan City

1988-1989

Russell R Sanderson: West Valley City

1986-1987

Phillip Goodrich: Orem City

1984-1985

Arthur D. Hunter: Sandy City

1982-1983

Norm Burden: Ogden City

1980-1981

Lance Bateman: Salt Lake City

1978-1979

Cliff Brown: Murray City

1976-1977

Donald L Fulton: Logan City

1976

Joe Vincent: City of St George