KSGFOA

KANSAS GOVERNMENT FINANCE OFFICERS ASSOCIATION

KSGFOA Board Meeting

July 17, 2025 | 10:30 am– 12:30 pm
William L. White Auditorium, Emporia, KS | 516 Mechanic St

Board Members

Johnette Shepek, President | Rebecca Doehling, Vice-President | Barry Smith, Secretary | Matt Koehn, Treasurer | Tami Robison, Past President | Richard Mikesic, Board Member | Rebekah McCurdy, Board Member | Rachelle Mathews, Board Member | Brooke Carroll, Board Member | Hope Hernandez, Board Member | Bret Glendening, Board Member

Item

Old Business

1. Approve April 11, 2025, Board Meeting Minutes

New Business

1. Review and approval of 2nd quarter financials (presented by Treasurer)
2. Presentation of YTD 2025 status of membership
3. 2025 Spring Symposium Budget Actuals
4. 2025 Spring Symposium Survey Results
5. 2025 Conference, Olathe, KS November 5-7, 2025
    a. Registration Status
    b. Sponsor Status
    c. Postcard – August?
    d. Awards
        i. Innovation Award
        ii. Lifetime Achievement Award
    e. Conference Scholarships – up to 5 scholarships
        i. When to open

ii. When to close

6. CPFO Scholarships
    a. When to open
    b. When to close
7. Board Member Listing – 2025 Terms Expiring and 2025 Treasurer
    a.

Board Member:	Term:	Length of Term:	Next Term:
Bret Glending (replacing Jenny):	*2025*	*1 -Year*	*3 -Year*
Brooke Carroll (replacing Leann Jo	*2025*	*1 -Year*	*3 -Year*

Executive Session

1. 2026 Contract

Announcements/Other

1. Upcoming Board Meetings
    a. September 19, 2025 - 10:00 - 11:00- Virtual Meeting for final conference items
    b. November 5, 2025 - 9:30 – 1:00- In-Person (includes lunch) on site at the conference.

Other Business

Adjourn

KANSAS GOVERNMENT FINANCE OFFICERS ASSOCIATION

KSGFOA Board Meeting Minutes

April 11, 2025 | 9:30 – 11:30 am
Virtual Meeting

Board Members

Johnette Shepek, President | Rebecca Doehling, Vice-President | Barry Smith, Secretary | Matt Koehn, Treasurer | Tami Robison, Past President | Richard Mikesic, Board Member | Rebekah McCurdy, Board Member | Rachelle Mathews, Board Member | Leann Johnson, Board Member | Hope Hernandez, Board Member | Bret Glendening, Board Member

Item

Old Business

- Approve January 10, 2025, Board Meeting Minutes
  Motion by Johnette Shepek, 2nd by Rachelle Mathews – Unanimously approved
- Approve January 17, 2025, Board Meeting Minutes
  Motion by Rachelle Mathews, 2nd by Rebecca Doehling – Unanimously approved
- Approve January 24, 2025, Board Meeting Minutes
- *Motion by Rebecca Doehling, 2nd by Rebekah McCurdy – Unanimously approved*

New Business

1. Review and approve 1st quarter financials (presented by Treasurer)
   Reviewed and discussed Q1 2025 Financials. Jamie Buster noted that the expenses for the budget academy binders were paid by PPMC in 2024. This expense will be moved to the KSGFOA Budget Academy Fund in 2025 Q2. For Q2, Matt Koehn will shift the budget column to the front and then add in a conference budget to actuals column for clarity when comparing fall conference budget to actuals. Motion to approved as amended (update months in 2025 Q1 from Oct-Dec to Jan-Mar) by Richard Mikesic 2nd by Bret Glendening - Unanimously approved

2. Presentation of YTD 2025 status of membership

   Discussed status of membership report. Currently at 131 compared to 155 in the same period last year. Details were requested to compare registrations and see why membership is down. PPMC will send out reminder email stating, if membership is not renewed, access to the listserv will be removed. Will give members until the end of April to renew before scrubbing the listserv member list. This will become an annual process to scrub the listserv on March 31st each year.

3. Update on Spring Symposium:
   a. Registrations

      38 registered as of today $6,290 in registration fees – 2 sponsors generating $1,500 in sponsorship revenue. Will not have facility rental, speaker fees are at $680, and equipment rental will be minimal which will save on expenses.

   b. Schedule

      Will update the schedule on the website with confirmed speakers and topics. The remaining two spots will be updated once speakers are confirmed. Discussed additional items for speakers to touch on. Awaiting a reply from Mark Manning for confirmation on presenting the transient guest tax topic. Johnette Shepek will do the welcome and board member introductions. Johnette will send out a sign-up list for board members to select which presentation they will introduce. Look at getting a QR code for member surveys once presentations/conference is over. Will give the speakers remaining messenger bags and cups we have left over.

   c. Dr. Guo event Thursday night and conference Friday

      Dr. Guo wanted to reiterate that everyone who is registered is invited to his conference on Friday.

4. 2025 Conference, Olathe, KS tentative dates November 5-7, 2025
   a. Items that PPMC negotiated with the venue this year

      Discussed items PPMC negotiated for the Fall conference:

      - *Free Podiums – last year charged $50 per podium per day*
      - *20% off all in house AV use*
      - *1 free sleeping room for every 40 nights – will use to offset speaker travel costs*
      - *The first 20 vendors' tables will be at no cost to us.*

      Reviewed contract with Embassy Suites. Motion to approve the Embassy Suites contract by Tami Robison, 2nd by Richard Mikesic – Unanimously approved
      Thank you PPMC for these additional negotiated discounts!

   b. Brainstorm topics/speaker ideas

      Jamie reported we have been solicited quite frequently from keynote speakers and presented some speakers/topics for consideration. The board discussed speakers and potential topics. Jamie will reach out to the preferred speakers to see who can be confirmed for the keynote and possibly a general presentation. Board members will submit other topics via email to Jamie.

c. Discuss social event
Game Show event – Laura will send details on pricing to the board – Will also investigate other ideas.

d. Confirm conference swag ideas
    i. Review pricing for items suggested at the January meeting.
    The board discussed swag ideas. Decided on the blue dri-fit quarter zip pullover for attendees

e. Discuss 3-hour Pre-Conference session and schedule
Discussion was held on potential topics. Will revisit at the next board meeting.

f. Conference Scholarships – up to 5 scholarships
    i. When to open
    ii. When to close
    Will discuss at the July board meeting.

g. Date for September Board Meeting.
    Johnette will send an email to the board to determine the July in person board meeting location as well as dates to consider for the September board meeting.

Announcements/Other

1. Upcoming Board Meetings
    a. July 17, 10:30 – 12:30 In-Person in Salina

    b. September ??, 2025 - 10:00 - 11:00- Virtual Meeting for final conference items

    c. November 5, 2025 - 9:30 – 1:00- In-Person (includes lunch) on site at the conference.

Other Business

Adjourn

KSGFOA Academy Fund
Budget Document
For the 3 Months ending June 30, 2025

	2025 Q2 Actual (Apr-Jun)	2025 Budget	2025 YTD Actual	Over/(Under) Budget	Notes
Beginning Cash Balance	**$ 8,723**	**$ -**	**$ 9,876**	**$ -**	
Revenues					
Registration Fees	0	0	0	0	
Conference Sponsorships & Advertising	0	0	0	0	
Transfer In from Operating	-972	0	0	0	Correction from Q1
Miscellaneous	0	0	0	0	
Total Revenues	$ (972)	$ -	$ -	$ -	
Expenses					
Personnel	0	0	2,125	2,125	
Facility Rental	0	0	0	0	
Equipment Rental (MRC)	0	0	0	0	
Meals/Refreshments	0	0	0	0	
Copying/Printing	2,925	0	2,925	2,925	2024 Book Printing Correction
Supplies	0	0	0	0	
Honorarium(s)	0	0	0	0	
Speaker/Facilitation	0	0	0	0	
WSU Staff/Faculty	0	0	0	0	
Travel	0	0	0	0	
Gifts	0	0	0	0	
Credit Card Fees	0	0	0	0	
Travel (Staff)	0	0	0	0	
Misc Expenses	0	0	0	0	
Scholarships	0	0	0	0	
Transfers	0	0	0	0	
Other		0	0	0	
Total Expenses	$ 2,925	$ -	$ 5,050	$ 5,050	
Net Income (Loss)	**$ (3,897)**	**$ -**	**$ (5,050)**	**$ (5,050)**	
Changes in Accounts Receivable	$ -				
Ending Cash Balance	**$ 4,826**		**$ 4,826**		

KSGFOA Symposium Fund
Budget Document
For the 3 Months ending June 30, 2025

	2025 Q2 Actual (Apr-Jun)	2025 Budget	2025 YTD Actual	Over/(Under) Budget	Notes
Beginning Cash Balance	**$ 5,699**	**$ -**	**$ 4,384**	**$ -**	
Revenues					
Registration Fees	3696	8,100	8,816	716	
Conference Sponsorships & Advertising	0	0	0	0	
Total Revenues	$ 3,696	$ 8,100	$ 8,816	$ 716	
Expenses					
Personnel	7,210	7,210	10,355	3,145	Diff. from 2024 Symposium
Facility Rental	0	450	0	(450)	
Equipment Rental (MRC)	0	1,000	0	(1,000)	
Meals/Refreshments	1,466	2,600	1,466	(1,134)	
Copying/Printing	146	120	146	26	
Supplies	0	50	0	(50)	
Honorarium(s)	0	0	0	0	
Speaker/Facilitation	680	4,000	680	(3,320)	
WSU Staff/Faculty	0	0	0	0	
Travel	0	0	0	0	
Gifts	0	40	0	(40)	
Credit Card Fees	0	300	0	(300)	
Travel (Staff)	0	0	0	0	
Misc Expenses	0	0	0	0	
Scholarships	0	0	0	0	
Transfer out to Operating	0	0	0	0	
Other	0	0	0	0	
Total Expenses	$ 9,501	$ 15,770	$ 12,646	$ (3,124)	
Net Income (Loss)	**$ (5,805)**	**$ (7,670)**	**$ (3,830)**	**$ 3,840**	
Changes in Accounts Receivable	$ (660)	$ -	$ -	$ -	
Ending Cash Balance	**$ 554**		**$ 554**		

KSGFOA Conference Fund
Budget Document
For the 3 Months ending June 30, 2025

	2025 Q2 Actual (Apr-Jun)	2025 Budget	2025 YTD Actual	Over/(Under) Budget
Beginning Cash Balance	**$ 30,044**		**$ 72,721**	
Revenues				
Conference Sponsorship & Advertising		32,000		(32,000)
Conference Registration		38,680	-365	(39,045)
Scholarship Fees				0
Total Revenues	$ -	$ 70,680	$ (365)	$ (71,045)
Expenses				
Personnel		14,580	13,950	-630
Equipment Rental (technology)		7,000	6,642	-358
Room Rentals		2,750	2,250	-500
Meals/Refreshments		23,000	17,439	-5,561
Vendor Tables (30 tables x 25 per/table)		750	0	-750
Vendor Reception		3,000	1,433	-1,567
Social Event		4,500	0	-4,500
Board Meeting Lunches		250	0	-250
Copying/Printing		400	0	-400
Postage		185	0	-185
Supplies (conference swag)		4,000	1,130	-2,870
Speaker/Faciliatation (Fee) - Keynote		5,000	0	-5,000
Speaker Fee- General Sessions		950	0	-950
Speaker Hotel (Keynote + 2 speakers)		680	0	-680
Speaker Gifts		400	0	-400
Sponsor Thank you		75	0	-75
On-Line Credit Card Exp.		1,500	0	-1,500
Misc. Expenses (awards, nametags, etc.)		350	-32	-382
Total Expenses	$ -	$ 69,370	$ 42,812	$ (26,558)
Net Income (Loss)	**$ -**	**$ 1,310**	**$ (43,177)**	**$ (44,487)**
Changes in Accounts Receivable	$ -	$ -	$ (500)	$ (500)
Ending Cash Balance	**$ 30,044**	**$ -**	**$ 30,044**	**$ -**

KSGFOA Operating Fund
Budget Document
For the 3 Months ending June 30, 2025

	2025 Q2 Actual (Apr-Jun)	2025 Budget	2025 YTD Actual	Over/(Under) Budget	Notes
Beginning Cash Balance	**51,982**		**45,022**		
Revenues					
Transfer in from Symposium		-	-	-	
Net Revenue from Acct/Budget Academy		1,500	-	(1,500)	
Net Revenue from Fall Conference		1,500	-	(1,500)	
Membership Dues	2,425	14,575	14,701	126	
Total Revenues	2,425	17,575	14,701	(2,874)	
Expenses					
Board Expense		100	-	(100)	
PPMC - Management	2,341	9,365	6,060	(3,305)	
PPMC - Travel		2,500	-	(2,500)	
PPMC - Marketing		100	-	(100)	
Credit Card Fees		700	-	(700)	
Postage		700	-	(700)	
Copying/Printing		100	-	(100)	
Scholarships Transfer to Academy	(972)	-	-	-	Correction from Q1
Web	-	1,300	500	(800)	
Total Expenses	1,369	14,865	6,560	(8,305)	
Net Income (Loss)	**1,056**	**2,710**	**8,141**	**5,431**	
Changes in Accounts Receivable	**(50)**		**75**		
Ending Cash Balance	**53,088**		**53,088**		

KSGFOA MEMBERSHIP REPORT
As of: July 1, 2025

Membership Type	2021 Final		2022 Final		2023 Final		2024 Final		2025	
	Number	Amount	Number	Amount	Number	Amount	Number	Amount	Number	Amount
Individual	185	$ 13,875.00	193	$ 14,475.00	181	$ 13,575.00	187	$ 14,025.00	156	$ 11,700.00
Association	13	$ 3,900.00	15	$ 4,500.00	11	$ 3,300.00	8	$ 2,400.00	9	$ 2,700.00
Association Add'l Individuals					3	$ 300.00	3	$ 300.00	0	$ -
Retired	0	$ -								
Student	2	$ 10.00		$ -	1	$ 5.00	2	$ 10.00	1	$ 5.00
Clerks	12	$ 600.00	14	$ 700.00	12	$ 600.00	11	$ 550.00	9	$ 450.00
Total	**212**	**$ 18,385.00**	**222**	**$ 19,675.00**	**208**	**$ 17,780.00**	**211**	**$ 17,285.00**	**175**	**$ 14,855.00**

2025 KSGFOA Spring Symp		
	2024 Budget	2024 Budget Actuals
Total Participants	**62**	**48**
Revenue		
Registration Fees		
Early Registration Fees- $165 p/p	$8,370.00	$6,480.00
Late Registration Fees $175 p/p		
Student/Intern Fees- $25 p/p	$25.00	$0.00
Hugo Wall Contribution	$4,000.00	$3,000.00
Refunds		
Sponsorship		
Total	**$12,395.00**	**$9,480.00**
Expenses		
Personnel	$3,145.00	$3,145.00
Facility Rental	$450.00	$450.00
Equipment Rental (MRC)	$1,500.00	$78.00
Meals/Refreshments	$2,500.00	$2,638.42
Copying/Printing	$200.00	$118.90
Supplies	$100.00	$42.91
Honorarium(s)		
Speaker/Faciliatation	$4,000.00	$1,582.13
WSU Staff/Faculty		
Travel		
Gifts	$40.00	$0.00
Processing Fees	$300.00	$185.50
Travel (staff)		
Misc. Expenses (conference swag)		
Total	$12,235.00	$8,240.86
Profit/Loss	**$160.00**	**$1,239.14**

Name	Please rate Keynote: Engaging Across Conflicting Values	Please rate Breakout Session: Kansas Economic Development Toolkit	What topics would you like to see in the future?
	5	5	For KSGFOA annual conference, please recruit someone from PMIB to discuss 1/1/26 public funds collateral changes
	5		
Lisa Faust	5		
Michelle Stroot	4	4	Continued Cyber-security. Would like for the GFOA conference and Public Finance Symposium to be back-to-back or mixed together instead of having competing sessions on the same day.
	3	4	
Dustin Sigler	4	4	Experiences and advice on career advancement

Ryan Adkison	4	5	Purchasing overview and best practices
Lindsay Poe Rousseau			More on soft skills; deficit solutions; "budget games" from GFOA
Brooke Carroll	5	5	
Lucas Mellinger	4		
Rachelle Mathews	4	5	More topics on leadership. Peer round table discussion and/or panel discussions held by peers on key issues.
Richard Mikesic	4		
Cassandra Sandusky	5	5	
Page Achilles	5		

Please rate Breakout Session: Why do 95% of the Governments in Kansas Currently Waive GAAP?	Please rate General Session: Cybersecurity 2025	Please rate Lunch Presentation: Navigating Federal Uncertainty-Implications for State and Local Governments	Please rate General Session: Securing Public Funds-Insights from Sedgwick County's Liquidity Management Team
	5	5	5
4	4	3	4
5	5	5	5
	5	5	5
	3	5	5
	4	4	

	4	4	4
		3	5
	5	3	3
5	3	4	4
	3	4	3
5	4	1	3
	5	5	5
5	5	5	5

Please rate Breakout Session: Effective Succession Planning	Please rate Breakout Session: Reserve Policies- Why they are important and to consider when creating one.	Please rate General Session: Influence with Integrity- Cultivating Civility in Public Finance Officials	What are you missing, what topics, training, knowledge do you feel like you need more of?
	5	5	
4		5	
	5		
	5	5	
			Policy development.
	4	4	I thought the presentations were great I would like to see discussions on how to source accurate information. With so much misleading information out there it would be helpful to know what to look for to determine is information is accurate.

3			Might want to end a few minuets earlier.
		5	More on budgeting, capital planning, new GASB standards
5		5	
5		3	
4		4	
	5	4	
	4	4	
5	5		

KSGFOA
Kansas Government Finance Officers Association

2024 KSGFOA Innovation Award Nomination Application copy

The innovation award is designed to recognize and promote creative public finance initiatives and projects that provide innovative and creative solutions to address organizational and community challenges. Winners are those who reflect dedication and inventiveness in public finance and governance to deliver excellence in public services. Initiatives and projects should have occurred within the last two years. Applications are due August 23, 2024.

Initiative and project examples include:
- Services that have made a contribution to building a transparent, innovative, sustainable and collaborative working environment
- Creative and original contribution to public financial management and/or governance or demonstrated new thinking in how to improve efficiency and effectiveness
- Achievements in new ways to realize efficiencies, improving effectiveness, increasing performance and/or provide competitive advantage
- Innovative approach to delivering high quality, accessible and clear financial reports and accounts
- Delivery of high quality financial reporting in line with accepted accounting principles that is accessible and readily

understood by the public
- Innovative response to financial challenges
- Innovative approaches that utilize effective financial planning and leadership.
- Transformational services that have resulted in the delivery of financial and operational advantages
- Creativity in working to achieve financial resilience against a backdrop of challenges
- Successfully improved organizational processes, systems and policies

Award submission information should include a full description of the innovative project or initiative and any and all supporting detailed documentation. The initiative or project can be a result of; taking an existing product or service and improving it, developing a new idea, or a combination of both.

Award review will evaluate the overall impact that the innovation has had on the organization or community and whether the innovation achieved or exceeded its objectives and goals. Review criteria will include the evaluation of how the project or initiative improved such things as efficiency, effectiveness, process improvements, service delivery, transparency, etc.

The award nominee must receive the support of a majority of the KSGFOA Board to be given the award. The name of the award recipient(s) will be recognized and presented with an award at the Virtual KSGFOA Annual Conference Business Meeting.

The KSGFOA Board will solicit nominations for this award on an annual basis although KSGFOA members may submit nominations meeting the above criteria to the KSGFOA President at any time. Nominations must be submitted at least two months prior to the date of the annual conference in which an award may be given.

The KSGFOA Board will evaluate nominees for the award. Nominated candidates not selected for the award may be

considered by the KSGFOA Board for a future award.

* Required Question(s)

Name of Nominating Person *

Nominating Person Email Address *

Nominating Person Phone Number *

Nominating Organization Name

Nominating Organization Email Address

Nominating Organization Phone Number

Nominee Individual or Organization Name *

Nominee title/position *

Nominee organization *

Nominee organization mailing address *

Nominee phone number *

Nominee email address *

Provide a full description of the nominee's creative public finance project or initiative. Send supplemental examples and/or documentation to laura.baxter@wichita.edu with the subject "KSGFOA Innovation Award Nomination Documents." *

Does nominee/organization know about the nomination?

- YES

NO

Nominee Dietary Restrictions

(ex: gluten free, vegetarian, allergies, etc.)

Nominee ADA Accommodations

(ex. nursing mother's room, seating requirements, vision accommodations, etc.)

Submit

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KSGFOA
Kansas Government Finance Officers Association

2024 KSGFOA Lifetime Achievement Award Nomination Application

The purpose of the Lifetime Achievement Award is to recognize an individual's achievements in outstanding leadership in public finance over the course of their career.

Please complete the application in its entirety. You can reach Laura Baxter at laura.baxter@wichita.edu or 316-978-6338 with questions.

Application Details:
Applications are due by August 23, 2024
The KSGFOA Board will determine the award recipient
Award recipients must be members of KSGFOA

* Required Question(s)

Name of Nominating Person *

Email Address of Nominating Person *

Phone Number of Nominating Person *

Name of Nominating Organization *

Email Address of Nominating Organization *

Phone Number of Nominating Organization *

Nominee name *

Nominee title/position *

Nominee mailing address *

Nominee phone number *

Nominee email address *

Provide a description of how the individual has exhibited outstanding leadership over the course of their career and exhibited honesty, integrity and inspired others. *

Does nominee know about the nomination?

- YES
- NO

Nominee Dietary Restrictions

(ex: gluten free, vegetarian, allergies, etc.)

Nominee ADA Accommodations

(ex. nursing mother's room, seating requirements, vision accommodations, etc.)

Submit

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