KANSAS GOVERNMENT FINANCE OFFICERS ASSOCIATION

KSGFOA Board Meeting

July 26, 2024 | 10:00 – 2:00 pm
Salina Public Library

Board Members

Tami Robison, President | Johnette Shepek, Vice-President | Rebecca Doehling, Secretary | Hope Hernandez, Treasurer | Richard Mikesic, Board Member | Rachelle Mathews, Board Member | Barry Smith, Board Member | Leann Johnson, Board Member | Matt Koehn, Board Member | Jenny Newberry, Board Member

Matt Lawn, Past President- no longer on board-resigned his position in Goddard

Item

Old Business

1. Approve April 26, 2024, Board Meeting Minutes
2. Update on Budget Academy registration
3. GFOA conference recap

New Business

1. Review and approve 2nd quarter financials (presented by Treasurer)
2. Presentation of YTD 2024 status of membership
3. 2024 Spring Symposium Budget Actuals (Discuss Dr. Guo contribution)
4. 2024 Conference
    a. Registration Status
    b. Sponsor Status
    c. Postcard- August?
    d. Review Call for Presentations
    e. Brainstorm additional topics/speaker ideas
    f. Assign topics in schedule

    g. Approve conference swag ideas
    h. Awards
    i. Conference scholarship submissions
5. CPFO Scholarship Submissions
6. Board Member announcement
    a. Review current board positions
    b. Board member submission- review date

Executive Session:

1. WSU/KSGFOA Contract
    a. Initial review by Paula
    b. Board review draft document- updates/responses

Announcements/Other

1. Upcoming Board Meetings
    a. September 24, 10:00 - 11:00- Virtual Meeting for final conference items
    b. November 6, 9:30 – 1:00- In-Person (includes lunch) on site at the conference.

Other Business

Adjourn

KSGFOA 2024 Conference					
Call for Presentation Submissions					
As of: July 19, 2024					
Lead Presenter	**Organization**	**Co-Presenter**	**Organization**	**Presentation Title**	**Session Description**
Ben Hart	Baker Tilly	Lucas Peterson	Baker Tilly	Not done yet. Post-obligation issuance duties.	While it feels like a debt issuance closing is the finish line, it's only the beginning of post-issuance responsibilities. Continuing financial condition disclosure is essential to maintaining access to the capital market and solidifying relationships with the rating agencies and investors. Arbitrage monitoring is more important then ever now that investment rates have risen.
Carrie Cox	AGH			AI in the Workplace: Best Friend or Worst Nightmare?	Artificial Intelligence is everywhere. This program addresses practical uses and considerations for AI in the workplace to help you leverage efficiencies in work processes while managing risk to the organization.
Carrie Cox	AGH			Using Generational Differences as a Competitive Advantage	With four generations in the workplace, understanding their different needs, drivers, and frustrations can lead to a competitive advantage for both recruitment and retention and serving stakeholders and community partners.
Carrie Cox	AGH			Learning and Development as a Business Strategy	The skills needed in the workforce continue to evolve at a fast pace. Organizations focused on learning and development are best positioned to remain competitive for talent.
Gera McGuire	Moody's Ratings			Kansas Economic Landscape and Credit impact	Join us for an update of Kansas economic and demographic data and the expected impact on certain regions of the state.
Kolbe Krzyzanowski	Baker Tilly	Tom Kaleko	Baker Tilly	Economic Outlook	Dig into the details of market fundamentals to draw trends impacting your local economy and municipal bond interest rates.
Max Alexander	J.P. Morgan			AI Unleashed - Cyber Fraud, Deep Fakes and Payment Trends (Subject to change as we get closer to the date of the event)	More will come as we get closer to the event date. The topics that we generally cover with it comes to AI/ML are •Deep Fake Fraud •AI data leakage •AI misuse/mis-trust •The cost of AI •The different types of AI •AI use cases
Thomas Skoch	ClearGov			Tips for Modernizing Your Budget Process	Explore modern budgeting methods enhancing efficiency and transparency in the public sector. Transform your process with innovative strategies for collaboration and transparency in today's evolving landscape.
Tom Kaleko	Baker Tilly	Lucas Peterson	Baker Tilly	Reinvestment Housing Incentive Districts	The Kansas legislature super-charged the Reinvestment Housing Incentive District Act, now making the tool available in rural and urban jurisdictions. How can this tool compliment your affordable housing strategies?
Tom Kaleko	Baker Tilly			Economic Development Due Diligence	Learn a time-proven approach to one of your community's most important resource allocation decisions – granting of financial incentives for economic development projects.

2024 KSGFOA CPFO SCHOLARSHIP SUBMISSIONS

Theresa Morlan	Finance/HR Director	City of Kechi	2-year member	Willing to be a board member		
BIO			**What are your future endeavors and how would being selected to participate in this program help you achieve your goal?**	**Where do you see yourself from a career standpoint in five years?**	**What KSGFOA training and events have you participated in?**	**How long have you been in the finance profession and in what capacities?**
I started my career with the city part-time in 2011 and full-time in 2014. I started as Deputy City Clerk and was promoted to City Clerk in January 2020 after the retirement of our 24 year City Clerk. She left me with big shoes to fill, especially with the pandemic immediately around the corner. In March of 2023, I moved into the role of Finance/HR Director. Although I have not had formal training, but through my responsibilities in utility billing, AP, AR, and payroll, I have worked along side previous finance directors in learning on the job. I do recognize that I have a lot of learning still to come. I have a Bachelor of Arts degree from Wichita State University in Secondary Math Education. I taught for 8 years at Wichita Area Technical College. Since then, I have been an adjunct instructor for 26 years. I have lived in Kechi for 22 years with my husband Chris of 39 years, where we raised our three children in whom we are very proud.			I WILL to continue to improve my proficiency and skills as the city's finance director to better serve my community. I have already benefited from the networking and enhancement of knowledge gained through GFOA and KSFOA, and want to continue my professional growth, provide accurate, consistent, and effectively communicative financial reporting for my city, and be vital member of the municipal finance community through shared improvement and experiences.	I see myself as continuing my role as the Finance/HR Director for the City of Kechi. My hope is that this is my career until I retire.	I have participated in the KSGFOA Conference in November 2023, the Spring Symposium in May 2024. I have also taken several courses offered through GFOA including Equity in Budgeting, Fundaments of Local Government Budgets, and 5th Annual Mini Muni Conference.	One year, as the city's Finance/HR Director.
Kari Holwick	Senior Financial Analyst	WaterOne	11 years (Served on the KSGFOA Board as President, Vice President, Secretary, Treasurer and Past President)	Willing to be a board member		
BIO			**What are your future endeavors and how would being selected to participate in this program help you achieve your goal?**	**Where do you see yourself from a career standpoint in five years?**	**What KSGFOA training and events have you participated in?**	**How long have you been in the finance profession and in what capacities?**
My career growth includes over twenty-three years of professional business experience focusing on budget preparation, financial analysis, financial reporting, strategic planning, accounting, and leading project teams. I have experience in City Government, County Government, Federal Government Contracting and Special Districts.			Most of my career, I have been involved with Accounting, Financial Reporting, Planning and Budgeting. There are many advancement opportunities at WaterOne in the areas of Treasury and Investment Management, Debt Management and Procurement, Compensation and Benefits, Procurement and Risk Assessment. This program would provide me with the certification I need to advance at WaterOne, enhancing fundamental skills and increasing knowledge of best practices and standards in public finance.	In five years, I see myself moving into a leadership position in the Finance Department at WaterOne, overseeing public finance disciplines. The CPFO program would help prepare me for the leadership position.	I attend the KSGFOA conference each year. During my time on the KSGFOA Board, I assisted in planning the annual conference, spring symposium and training opportunities.	I have been in the finance profession since 2001, starting out my career as a Fund Accountant at State Street. In 2002, I started with the City of Lee's Summit as a Financial Analyst and moved my way up to Budget Officer. I accepted the position of Senior Business Analyst at Black & Veatch in 2011. In 2013, I started at Johnson County as a Budget Analyst, and moved my way up to Manager of Business Operations. Today I am a Senior Financial Analyst at WaterOne.

Mandi J. Sleiter	Senior Financial Management Analyst	City of Wichita Pension Management	9 years	NOT willing to be a board member		
BIO			**What are your future endeavors and how would being selected to participate in this program help you achieve your goal?**	**Where do you see yourself from a career standpoint in five years?**	**What KSGFOA training and events have you participated in?**	**How long have you been in the finance profession and in what capacities?**
I have been a City of Wichita Department of Finance professional in accounting since March 2015. I have been promoted from Accountant to Senior Accountant, to my current Senior Financial Management role in the 9 1/2 years at the City. I have a passion for helping the community, fellow public coworkers and being a good steward of resources. I have been fortunate to get to work with Governmental, Internal Service and Pension funds in my tenure. I also was honored to be nominated for the mini MPA program at WSU which I graduated from in 2019. I continue to strive to learn more about being a government finance professional. I would be honored to be award this scholarship to further my education. I aspire for management and want to be well equipped with knowledge to be the best professional I can be.			I strive to be a Division Manager in Finance. Specially Pension Manager currently.	As a Division Manager in Finance.	GFOA GAAR training in Topeka 2015 Yearly GFOA GAAP updates	I have been in public finance for 9 1/2 years and been a finance professional for 25 years. I have held roles of Accountant, Senior Accountant, Financial Analyst, Senior Financial Analyst, Accounting Supervisor, Senior Financial Management Analyst.
Brad Scott	City Administrator	City of Hiawatha	Less than 1 year	NOT willing to be a board member		
BIO			**What are your future endeavors and how would being selected to participate in this program help you achieve your goal?**	**Where do you see yourself from a career standpoint in five years?**	**What KSGFOA training and events have you participated in?**	**How long have you been in the finance profession and in what capacities?**
My name is Brad Scott, and I started my career 19 years ago in the water department for the City of Hiawatha. My original duties included reading water meters and fixing water main breaks, but I kept learning and over the years I obtained several water and sewer licenses through KDHE and worked my way to water supervisor first, then public works director. My career started to take a different trajectory last year as I started to be relied upon for administrative tasks and project management. After a change in leadership I was named interim city administrator and was given the opportunity to become the full time city administrator for Hiawatha about a month ago. I have vast operational knowledge, but admittedly I lack knowledge on the financial side of being an administrator. If chosen, I will use the knowledge gained through the program to serve the community I have called home for my entire life. Thank you for your consideration.			I would love nothing more than to serve the rest of my career in the great city of Hiawatha. I would use the knowledge gained to the benefit of the community.	I see myself still working for the City of Hiawatha in five years, and hopefully for the remainder of my career.	I attended the spring symposium in Wichita this last spring.	I am new to the finance profession as city administrator, and I have only been in the profession on an interim an now permanent basis for less than three months.

Natalie Talley	Accountant	City of Spring Hill	Approx 2 years	Willing to be a board member		
BIO			**What are your future endeavors and how would being selected to participate in this program help you achieve your goal?**	**Where do you see yourself from a career standpoint in five years?**	**What KSGFOA training and events have you participated in?**	**How long have you been in the finance profession and in what capacities?**
My name is Natalie Talley, and I am the accountant for the City of Spring Hill. I have lived in this area my whole life, and love being able to serve a local community. I have a bachelor's degree in business, a Master of Accountancy, and I am a licensed CPA in the state of Kansas. I spent the beginning of my career in public practice, but it never seemed very fulfilling. When my husband and I welcomed our first daughter, I made the career change to Governmental Accounting. It was the best decision I have made for my career. I always enjoyed learning about Governmental accounting while in school and have found my niche. I love working in a community that is rapidly growing, and getting to experience the financial aspects that accompany it.			I know that I want to remain in governmental accounting. I also want to remain working for the City of Spring Hill. Things are changing quickly here, and it has been a great experience learning along the way. If selected for this program, I know the certification will help me achieve my goal of becoming the Finance Director, but it will also help me assist the City as new financial situations arise. I want to continue to learn the craft and be an asset to one of the fastest growing cities in the state. There will, of course, be growing pains, but I believe this program will help me ensure that the growing pains aren't due to a lack of financial knowledge.	In five years, I expect to still be employed with the City of Spring Hill and working to transition into the Finance Director role. The current director is expected to retire at shortly after the five-year mark. I'd love to be the financial leader in this community and guide them as we continue to grow rapidly.	I have attended the KSGFOA Annual Conference in 2021, 2022, 2023, and have registered to attend the conference in 2024. I intend to attend the budget conference as well when my organization allows me to register.	I am currently the accountant for the City of Spring Hill and have been since October of 2021. Before that I worked in public accounting for almost five years in Tax and Auditing. For a time, I was also the Utility Billing Clerk while the position was vacant. This was an incredible learning experience and really helped me understand my city. As the accountant my major responsibilities are to prepare our monthly financial snapshot provided to council and assist with the completion of the financial audit. I am also essentially the internal auditor for the city.

2024 KSGFOA Spring Symposium

	Budget	Budget Actuals
Total Participants	**62**	**48**
Revenue		
Registration Fees		
Early Registration Fees- $135 p/p	$8,370.00	$6,480.00
Student/Intern Fees-2 $25 p/p	$25.00	$0.00
Hugo Wall Contribution	$4,000.00	$3,000.00
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	$40.00
Credit Card Fees	$300.00	$185.50
Travel (staff)		
Misc. Expenses (conference swag)		
Total	$12,235.00	$8,280.86
Profit/Loss	**$160.00**	**$1,199.14**

Seminar budget based on a 1-day seminar on WSU Campus.

KSGFOA Annual Conference		
November 6 - 8, 2024		
Sessions	**Topic/Speaker**	**Room**
Wednesday- November 6		
9:00 - 1:00	KSGFOA Board Meeting/Lunch	
1:30-4:30	**Pre-Conference Session- Working Genius**	
	Kate Young	
1:30 - 4:30	**Registration**	Foyer
After 4:00	**Vendor Set-Up**	Foyer
Thursday November 7 - Conference		
7:30 - 8:00	**Registration/Breakfast/Vendors**	Foyer
8:00 - 8:30	**Vendor Introductions**	
8:30- 9:30	**Keynote- Paul Long**	
9:45 - 10:45		
Breakout Session 1		
	Barry Smith	
Breakout Session 2		
11:00 - 11:30	**Vendor Fair**	
11:30 - 1:40	**Lunch - KSGFOA Business Meeting & Presentation**	
	Legistlative Update- Stuart Little	
1:45-2:45		
General Session	**AI Unleashed- Cyber Fraud, Deep Fakes and Payment Trends**	
	Max Alexander- JP Morgan Chase	
2:50 - 3:50		
Breakout Session 3		
Breakout Session 4		
4:00 - 5:00		
5:00 - 6:30	**Vendor Reception**	Foyer
7:00 - 9:30	**Social Event**	Culinary School- KC
Friday, November 8- Conference		
7:30 - 8:30	**Breakfast/Vendors**	Foyer
8:30-10:00		
General Session	**Using Generational Differences as a Competitive Advantage**	
	Carrie Cox, AGH	
10:15 - 11:15		
Breakout Session 5		
Breakout Session 6		
11:30 - 12:30		
General Session		

Potential Speakers/Topics:		
Federal Reserve	Economic Update	Speaker Request Sent 9/26/23
Fentanyl Issue in Kansas		
Broadband		
DEI		
Speed-Dating Network Session-	Rountables with Questions/Experts there	
Performance Measures in Budgeting		
CIP Program Focus		
Captial Assets	Kyle- Speaker at KSGFOA Spring Symposium	
What Kansas Cities/Counties can piggyback on-contracts, etc.	State of Kansas?	

KSGFOA Conference Swag Options

Cup – qty 30

20 oz tumbler – Laser Engrave

Set up charge $55

Price $13.82 each

Shipping TBD

Comes in colors- 30oz –Engravable

Set up $60

Price $13.19 each

Shipping TBD

20 oz mug- can engrave logo

Set up $55

$15.45 each @ qty 30= $463.50

Shipping tbd

YETI choices- From YETI site due to qty being ordered.

20 oz rambler- Limited colors to engrave, Green, Teal Blue, black – $30 each with $10 logo fee.

Rambler with handle 20z

Colors to engrave. Lime, Big wave blue, Teal, Navy, White. Seafoam, black.

$38 each with $10 logo fee

Messenger Bag quotes 150-175 qty

$ 14.24 each – Spectrum

Size- 14”Wx12”5 H x 2/5” deep

Set up $59.00

Shocker printing- $14.25 each for qty 150 = $2137.50

Plus Set up $50.00

1 color print

$13.50 each Min of 60 to be ordered

15” bag

Shocker Promo- Urban 15” bag

$10 each

Set up $50

$1500.00 for qty 150 plus set up charge.

Bolt messenger bag

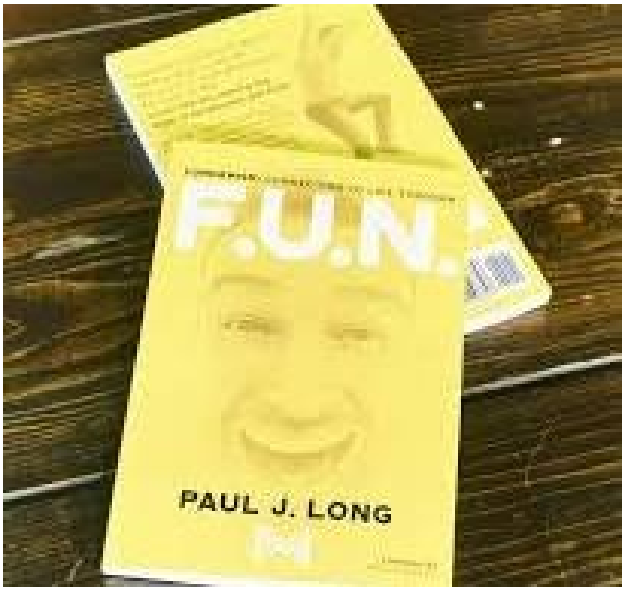
13.5” W x 12.25 H x 3.25” d

Digital imprint / silkscreen/Embroidery

Embroidery quoted but has other options for less $. EACH is $15.30

$2295.00 plus set up fee.

Set up $45.00



Can purchase Keynote presenter's book for $10 each

WICHITA STATE UNIVERSITY

PUBLIC POLICY & MANAGEMENT CENTER

CONTACT

Paula Downs, Talent & Organizational Success Manager

Paula.downs@wichita.edu

316-978-6678

Services Proposal 2025 - 2027

Kansas Government Finance Officers Association (KSGFOA) | July 2024

Background

In response to a request from the Kansas Government Finance Officers Association (KSGFOA) the Public Policy and Management Center (PPMC) at Wichita State University is proposing to continue to provide association management and annual professional development services for KSGFOA.

Purpose

The purpose is to provide continuity of services that supports government finance officers across Kansas through association and professional development support services.

Process

The PPMC will provide the following association and professional development services in accordance with the KSGFOA Board.

The responsibilities performed by the PPMC will include:

Task 1. Administrative Services

General Administration

The PPMC will provide general administrative functions for KSGFOA functions to include, but are not limited to:

1. Develop five (5) board meetings annually; two (2) meetings held in-person in summer and on-site at the annual conference. Three (3) meetings will be virtual,

two (2) full board meetings and one(1) brief meeting for final conference preparation.

2. Develop and deliver board meetings:
    a. Identify venue space;
    b. Secure technology;
    c. Arrange lunch for meeting;
    d. Develop board agenda packet through communication with KSGFOA board president.
3. Provide guidance and support throughout the year for board members.
4. KSGFOA Executive Assistant attend national GFOA conference, upon board recommendation and approval. (Travel and registration costs will be covered by KSGFOA).

Financial Management

The PPMC will provide financial management functions for KSGFOA.

1. Receiving all invoices and payments made to the association, ensuring their timely payment/deposit, and keeping record of all financial transactions.
2. Quarterly finance information will be provided to the Association Treasurer to develop quarterly and annual unaudited financial reports to be presented to the Board for approval.
3. Create KSGFOA online payment products for membership, sponsorship, and all professional development offerings.
4. Manage KSGFOA online payment portal.
5. Transfer KSGFOA proceeds (less credit card fees) immediately following all professional development offerings.
6. Ensure membership fees are provided to KSGFOA home account.
7. Provide audit of all outstanding KSGFOA invoices to ensure collection of funds; audit reports.

Website Administration

The PPMC will assist in advancing marketing efforts of KSGFOA to extend the reach of its impact.

1. Manage user-friendly website to enhance membership experience.
2. Provide general updates as needed including: member information, professional development information, yearly updates, resources, board member updates, etc.

Membership Services

The PPMC will provide services to enhance the benefits of a KSGFOA membership.

1. Ensuring that all new members are promptly given access to the member-only listserv.;
3. Researching and expanding professional development content on the website.
4. Ensuring that members pay annual dues in a timely manner, with sufficient reminders sent and methods made accessible for ease of payment.
5. Providing guidance and response to membership inquiries and association related questions.
6. Develop and distribute marketing materials to potential and existing members as directed by the board.

Task 2. *Fall Conference*

PPMC will plan and deliver professional development topics across 2 days with three hour pre-conference session and approximately 12 contact hours.

1. Design, develop, evaluate, and manage professional development offerings in consultation with the KSGFOA Board.
2. Prepare a program budget for professional development offerings and once adopted by the KSGFOA Board, implement professional development offerings within authorized budget.

3. Perform meeting planning and oversee professional development offerings, including:
    a. marketing events through electronic communications, listserv and website;
    b. researching, recommending, and negotiating agreements for event venues and entertainment;
    c. recruiting and negotiating agreements with speakers and overseeing lodging and transportation of speakers, as necessary;
    d. creating banquet event orders, as necessary, for meals, refreshments, rooms, and room set-up;
    e. reserving audio-visual equipment;
    f. identifying, registering, and providing sponsor benefits; and
    g. overseeing events on site.
4. Performing financial management and reporting in connection with professional development offerings, including:
    a. invoicing participants, collecting fees, and authorizing and arranging refunds as necessary;
    b. executing all expenditures;
    c. accounting for revenues collected and disbursement of funds; and
    d. reporting on revenues, expenditures, and balances annually and by program offering.
5. Performing all administrative support for the conference, including:
    a. registering participants;
    b. preparing regular and electronic mailing lists, participant lists, name badges, table-top cards (if needed), handouts, participant packets, room signs, certificates of completion, and speaker confirmation and thank you letters;
    c. ordering amenities for meeting participants and speakers as necessary;
    d. providing onsite check-in and assistance to meeting participants; and
    e. ordering all necessary supplies.
6. Develop all contracts and agreements.
7. Maintain attendee participation and attendance records.

8. Respond to attendee questions.
9. Prepare and send out after-conference survey and provide board with summary report.
10. Sponsor/Vendor Support
    - General Responsibilities:
        - Design, develop, evaluate, and manage vendor/sponsor services;
        - Ensure vendor tables are ordered through the hotel event information;
        - Respond to vendor/sponsor questions regarding general conference information and vendor/sponsor benefits; and
        - Collect vendor logos for use on the conference website and in conference materials.
    - Marketing
        - Develop and send out vendor/sponsor registration invitations, including regular reminder registration emails.
        - Utilize vendor/sponsor listserv for registration.
        - Prepare and send out an electronic “save the date” to vendors/sponsors.
        - Provide vendor/sponsor benefit information and registration links on KSGFOA website.
        - Provide table tent labels for tables for sponsors/vendors to easily identify their location.
        - Update sponsor/vendor list with updated information and new sponsor/vendors.
        - Provide vendors/sponsors with conference registration information; hotel registration and block code information; prepare nametags; and arrange for electricity needs.
    - Vendor/Sponsor On-Site Support
        - Provide vendor booth map for location assignments.
        - Provide onsite support to vendors.

Task 3. ***Spring Symposium***

PPMC will plan and deliver professional development topics for 1 day for approximately seven (7) contact hours.

1. Design, develop, evaluate, and manage professional development offerings in consultation with the KSGFOA Board.
2. Prepare a program budget for professional development offerings and once adopted by the KSGFOA Board, implement professional development offerings within authorized budget.
3. Perform meeting planning and oversee professional development offerings, including:
    a. marketing events through electronic communications, listserv and website;
    b. researching, recommending, and negotiating agreements for event venues and entertainment;
    c. recruiting and negotiating agreements with speakers and overseeing lodging and transportation of speakers, as necessary;
    d. creating banquet event orders, as necessary, for meals, refreshments, rooms, and room set-up;
    e. reserving audio-visual equipment;
    f. identifying, registering, and providing sponsor benefits; and
    g. overseeing events on site.
4. Performing financial management and reporting in connection with professional development offerings, including:
    a. invoicing participants, collecting fees, and authorizing and arranging refunds as necessary;
    b. executing all expenditures;
    c. accounting for revenues collected and disbursement of funds; and
    d. reporting on revenues, expenditures, and balances annually and by program offering.
5. Performing all administrative support for the conference, including:
    a. registering participants;

b. preparing regular and electronic mailing lists, participant lists, name badges, table-top cards (if needed), handouts, participant packets, room signs, certificates of completion, and speaker confirmation and thank you letters;
c. ordering amenities for meeting participants and speakers as necessary;
d. providing onsite check-in and assistance to meeting participants; and
e. ordering all necessary supplies.

6. Develop all contracts and agreements.
7. Maintain attendee participation and attendance records.
8. Respond to attendee questions.
9. Prepare and send out after-conference survey and provide board with summary report.

Task 4. ***Accounting Academy (odd years)***

PPMC will plan and deliver professional development topics across 4 days and approximately 28 contact hours.

1. Design, develop, evaluate, and manage professional development offerings in consultation with the KSGFOA Board.
2. Prepare a program budget for professional development offerings and once adopted by the KSGFOA Board, implement professional development offerings within authorized budget.
3. Perform meeting planning and oversee professional development offerings, including:
    a. marketing events through electronic communications, listserv and website;
    b. researching, recommending, and negotiating agreements for event venues and entertainment;
    c. recruiting and negotiating agreements with speakers and overseeing lodging and transportation of speakers, as necessary;
    d. creating banquet event orders, as necessary, for meals, refreshments, rooms, and room set-up;

e. reserving audio-visual equipment;
f. identifying, registering, and providing sponsor benefits; and
g. overseeing events on site.

4. Performing financial management and reporting in connection with professional development offerings, including:
    a. invoicing participants, collecting fees, and authorizing and arranging refunds as necessary;
    b. executing all expenditures;
    c. accounting for revenues collected and disbursement of funds; and
    d. reporting on revenues, expenditures, and balances annually and by program offering.
5. Performing all administrative support for the conference, including:
    a. registering participants;
    b. preparing regular and electronic mailing lists, participant lists, name badges, table-top cards (if needed), handouts, participant packets, room signs, certificates of completion, and speaker confirmation and thank you letters;
    c. ordering amenities for meeting participants and speakers as necessary;
    d. providing onsite check-in and assistance to meeting participants; and
    e. ordering all necessary supplies.
6. Develop all contracts and agreements.
7. Maintain attendee participation and attendance records.
8. Respond to attendee questions.
9. Prepare and send out after-conference survey and provide board with summary report.

Task 5. ***Budget Academy (even year)***

PPMC will plan and deliver professional development topics across 2 days and approximately 14 contact hours.

1. Design, develop, evaluate, and manage professional development offerings in consultation with the KSGFOA Board.
2. Prepare a program budget for professional development offerings and once adopted by the KSGFOA Board, implement professional development offerings within authorized budget.
3. Perform meeting planning and oversee professional development offerings, including:
    a. marketing events through electronic communications, listserv and website;
    b. researching, recommending, and negotiating agreements for event venues and entertainment;
    c. recruiting and negotiating agreements with speakers and overseeing lodging and transportation of speakers, as necessary;
    d. creating banquet event orders, as necessary, for meals, refreshments, rooms, and room set-up;
    e. reserving audio-visual equipment;
    f. identifying, registering, and providing sponsor benefits; and
    g. overseeing events on site.
4. Performing financial management and reporting in connection with professional development offerings, including:
    a. invoicing participants, collecting fees, and authorizing and arranging refunds as necessary;
    b. executing all expenditures;
    c. accounting for revenues collected and disbursement of funds; and
    d. reporting on revenues, expenditures, and balances annually and by program offering.
5. Performing all administrative support for the conference, including:
    a. registering participants;
    b. preparing regular and electronic mailing lists, participant lists, name badges, table-top cards (if needed), handouts, participant packets, room signs, certificates of completion, and speaker confirmation and thank you letters;

c. ordering amenities for meeting participants and speakers as necessary;
d. providing onsite check-in and assistance to meeting participants; and
e. ordering all necessary supplies.

6. Develop all contracts and agreements.
7. Maintain attendee participation and attendance records.
8. Respond to attendee questions.
9. Prepare and send out after-conference survey and provide board with summary report.

Deliverables

The PPMC will deliver all tasks described in this proposal.

Timeline

The PPMC will deliver services outlined in this proposal beginning January 1, 2025, through December 31, 2027.

Budget

The budget is inclusive of all personnel, operational and administrative expenses. Travel and accommodations for events will be included in the professional development budget as an expense. All professional development expenses are approved by KSGFOA board. In 2026 and 2027 the contract will increase by 3% to cover administrative costs.

Expense	Cost
Item #1- General Administration	$00.00
Item #2- Fall Conference	$00.00
Item #3- Spring Symposium	$00.00
Item #4- Accounting Academy	$00.00
Item #5- Budget Academy	$00.00
Total	$00.00

Total – 2025	$
Total – 2026 (2025 total x 3%)	$
Task – 2027 (2026 total x 3%)	$
Total- 2025 - 2027	$

Any additional service outside of the scope above will be billed at a negotiated rate. All professional development expenses (beyond staff) are included in the approved budgets. Contract adjustment may be needed due to unforeseen cost increases. Adjustments will be brought to the board for approval. Translation services and fees related to reasonable accommodation requests will be the responsibility of KSGFOA.

Payment Process

The PPMC will bill for 25% quarterly for Administrative Services.

The PPMC will bill at the completion of each professional development offering.

Project Management

The PPMC will assign Paula Downs as the KSGFOA Executive Assistant. Paula will be assisted by other PPMC staff to deliver tasks outlined in this proposal.

About the PPMC

The PPMC, located at Wichita State University, nonprofit, nonpartisan, a self-funded organization, operating as a small business with public purpose: **Enhancing public service to best serve your community.** The PPMC specializes in:

- Strategic Planning and Goal Setting
- Survey Research
- Customized Executive and Management Training and Professional Development
- Facilitation of Governing Body Retreats and Community Forums
- Education and Certification for Members of Professional Associations
- Applied Research on Issues Identified by Public Officials
- Technical Support on Public and Nonprofit Policy

For more than 65 years, the PPMC has worked directly with governments and nonprofit organizations in the areas of applied research, technical assistance, facilitation, and professional development. The PPMC has the professional knowledge and capacity to implement, manage, and ensure the successful completion of client projects

Recent Related Projects

Kansas County Clerks and Election Officials Association (KCCEOA)

In 1992, KCCEOA collaborated with the PPMC in the design and development of a certification institute for county clerks in Kansas. The Sanborn Institute is a three-year institute covering professional development in public management, interpersonal skills, and technical skills. In 1995, the Sanborn Master Academy was added to offer continuing education for certified county clerks. The PPMC plans and implements the Sanborn Institute/Academy. PPMC supports KCCEOA through website and listserv management.

Kansas Museums Association (KMA)

KMA partners with the PPMC to provide association support. The PPMC provides; association management, board support, professional development planning and implementation, membership management, marketing services, operational support, and financial management support to the association.

Workforce Innovation Conference

Since 2018, the PPMC has delivered the annual Workforce Innovation Conference on behalf of the Kansas Department of Commerce and the Kansas Board of Regents. Over 350 workforce professionals and partners attend the conference. The PPMC plans and delivers the conference from all aspects in coordination with a planning committee.

Kansas Department of Commerce

The PPMC delivers the annual To the Stars Business Award event on behalf of the Kansas Department of Commerce. Over 450 awardees and guests attend the annual evening event. The PPMC plans and delivers the event from all aspects in coordination with a planning committee.

City Clerks and Municipal Finance Officers Association (CCMFOA)

CCMFOA partners with the PPMC to provide association support. The PPMC provides; association support, board support, full professional development planning and implementation, membership management, marketing services, website management, listserv management, operational support, and financial management support to the association. Professional development support includes; institute and academy (institute is a four-year certification program and academy is designed to support obtaining a higher certificate across several years), virtual training sessions, and spring conference.

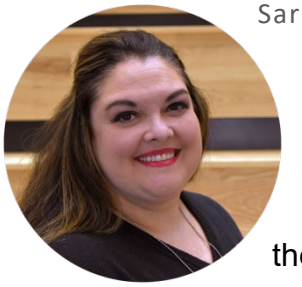
PPMC Project Team

Paula Downs, Talent and Organizational Success Manager

Paula Downs joined the Public Policy and Management Center in 2012 with more than 25 years of experience in the public sector, 13 of those as a project manager. In her current role, she oversees special projects; develops and delivers training on a wide range of topics; and assists local governments and nonprofits with board trainings, strategic planning, facilitation services and professional development. In addition, Paula has spent the last several years involved in community engagement efforts including, stakeholder interviews, focus group facilitation, survey development, citizen feedback sessions, and developing and utilizing tools that increase participation around identified topics. Paula holds a Master of Public Administration from WSU.

Laura Baxter, Project Manager

With 13 years of non-profit experience building community partnerships, planning programs, adult training, and events for membership across the state of Kansas. Laura believes in a hard work ethic and loves seeing growth in people and communities. In her current position as a Program Specialist, she assists local governments and nonprofits with board training, strategic planning, facilitation services, and professional development with local governments and non-profits. Laura is a Wichita State Alumni who holds a bachelor's degree in strategic communications.



Sarah Shaffer, Operations Manager

Sarah Shaffer provides operational management and program evaluation support at the Public Policy and Management Center. Prior to her role at Wichita State, she was a Senior Accountant in the Division of Finance at Sedgwick County, so she understands the needs of the County for reporting. Sarah's passion for public service can be recognized in her previous work experience, including as English as a Second Language (ESL) Coordinator for the Valley Center School District, Research Assistant for University of Kansas School of Medicine-Wichita, Psychosocial Group Coordinator for Mental Health Association of South-Central Kansas, and Children's Education Specialist for Kansas Children's Service League. Sarah holds BA and MA degrees in Sociology from WSU.

Briaja Tucker, Communications Coordinator

As a Communications Coordinator for the PPMC, Briaja assists with communications, graphic design, marketing, planning, logistics, and event coordination for the PPMC and its clients. She is currently working towards a bachelor's degree in graphic design at Wichita State University. Briaja is a Wichita native with a passion for reaching underserved populations through communications and design.

Christian Holley, Financial Specialist

Christian Holley is a Wichita Native who joined PPMC in 2023 as the center's Financial Specialist. In his current role, he supports the PPMC operation finances and is the administrative assistant. Christian is a Wichita State Alumni and holds a bachelor’s degree in finance.

Monica Salmeron, Project Associate

Monica is a project associate for the PPMC assisting with communications and marketing efforts for the PPMC and its clients. Monica is the Owner and Principal Consultant of Harmony Marketing. Monica is a Wichita native who uses her bilingual abilities to market to diverse groups of people. Her extensive marketing career includes previous work as a Brand Specialist and Brand Contact for local agencies.

Other PPMC professional staff, project associates, and/or student workers may contribute as required.

As of: June 30, 2024

Membership Type	2020 Final		2021 Final		2022 Final		2023 Final		202
	Number	Amount	Number	Amount	Number	Amount	Number	Amount	Number
Individual	166	$ 12,375.00	185	$ 13,875.00	193	$ 14,475.00	181	$ 13,575.00	165
Association	12	$ 3,600.00	13	$ 3,900.00	15	$ 4,500.00	11	$ 3,300.00	8
Association Add'l Individuals							3	$ 300.00	3
Retired	1	$ 50.00	0	$ -					
Student	3	$ 15.00	2	$ 10.00		$ -	1	$ 5.00	2
Clerks	4	$ 200.00	12	$ 600.00	14	$ 700.00	12	$ 600.00	11
Total	186	$ 16,240.00	212	$ 18,385.00	**222**	**$ 19,675.00**	**208**	**$ 17,780.00**	**189**

KSGFOA Operating Fund
Budget Document
For the 6 months ending June 30, 2024

	2024 Actual (Jan-June)	2024 Budget	2024 YTD Actual	Over/(Under) Budget
Beginning Cash Balance	**$ 47,499**	**$ 39,739**	**$ 42,664**	**$ 2,925**
Revenues				
Transfer in from Symposium		0	0	0
Net Revenue from Acct/Budget Academy		1,500		(1,500)
Net Revenue from Fall Conference		1,500		(1,500)
Membership Dues	13,780	14,575	13,780	-795
Total Revenues	$ 13,780	$ 17,575	$ 13,780	$ (3,795)
Expenses				
Board Expense		100	0	-100
PPMC - Management	7,438	15,000	7,438	(7,563)
PPMC - Travel		2,500		(2,500)
PPMC - Marketing		100		(100)
Credit Card Fees	327	700	327	(373)
Postage		700	0	(700)
Copying/Printing		100	0	(100)
Scholarships Transfer to Conference		0		0
Web		1,300		(1,300)
Total Expenses	$ 7,764	$ 20,500	$ 7,764	$ (12,736)
Net Income (Loss)	**$ 6,016**	**$ (2,925)**	**$ 6,016**	**$ 8,941**
Ending Cash Balance	**$ 53,515**	**$ 36,814**	**$ 48,680**	**$ 11,866**

KSGFOA Conference Fund
Budget Document
For the 6 months ending June 30, 2024

	2024 Actual (Jan-June)	2024 Budget	2024 YTD Actual	Over/(Under) Budget
Beginning Cash Balance	**$ 3,036**	**$ 18,770**	**$ 27,555**	**$ 8,785**
Revenues				
Conference Sponsorship & Advertising	14,500	35,000		(35,000)
Conference Registration	17,270	35,000	17,270	(17,730)
Scholarship Fees		14,575	0	(14,575)
Total Revenues	$ 31,770	$ 84,575	$ 17,270	$ (67,305)
Expenses				
Credit Card Fees	261	2,300	261	-2,039
Accounting/Budget Academy		0		0
PPMC - Travel		100		(100)
PPMC - Conference Admin Fee		0		0
PPMC - Personnel		9,885		(9,885)
Copying/Printing		300		(300)
Honorarium (Speaker)		7,000		(7,000)
Equipment Rental		9,000		(9,000)
Meals/Refreshments/Social Event	4,365	48,000		(48,000)
Awards/Nametags		0		0
Supplies		2,200		(2,200)
Scholarships		0		0
Other		0		0
Total Expenses	$ 4,626	$ 78,785	$ 261	$ (78,524)
Net Income (Loss)	**$ 27,144**	**$ 5,790**	**$ 17,009**	**$ 11,219**
Changes in Accounts Receivable	$ (6,240)	$ -	$ (6,240)	$ (6,240)
Ending Cash Balance	**$ 36,420**	**$ 24,560**	**$ 50,804**	**$ 26,244**

KSGFOA Symposium Fund
Budget Document
For the 6 months ending June 30, 2024

	2024 Actual (Jan-June)	2024 Budget	2024 YTD Actual	Over/(Under) Budget
Beginning Cash Balance	**$ -**	**$ -**	**$ -**	**$ -**
Revenues				
Registration Fees	6480	8,285	6,560	(1,725)
Conference Sponsorships & Advertising	0	0	0	0
Total Revenues	$ 6,480	$ 8,285	$ 6,560	$ (1,725)
Expenses				
Personnel	0	3,145	0	(3,145)
Facility Rental	450	0	0	0
Equipment Rental (MRC)	0	0	0	0
Meals/Refreshments	2,609	2,300	1,271	(1,029)
Copying/Printing	119	300	0	(300)
Supplies	92	100	0	(100)
Honorarium(s)	0	0	0	0
Speaker/Facilitation	782	2,000	1,050	(950)
WSU Staff/Faculty	0	0	3,145	3,145
Travel	0	0	0	0
Gifts	0	40	0	(40)
Credit Card Fees	280	300	155	(145)
Travel (Staff)	0	0	0	0
Misc Expenses	0	0	110	110
Scholarships	0	0	0	0
Transfer out to Operating	0	0	830	830
Other	0	0	0	0
Total Expenses	$ 4,332	$ 8,185	$ 6,560	$ (1,624)
Net Income (Loss)	**$ 2,148**	**$ 100**	**$ -**	**$ (101)**
Changes in Accounts Receivable	$ -	$ -	$ -	$ -
Ending Cash Balance	**$ 2,148**	**$ 100**	**$ -**	**$ (101)**

KSGFOA Academy Fund
Budget Document
For the 6 months ending June 30, 2024

	2024 Actual (Jan-June)	2024 Budget	2024 YTD Actual	Over/(Under) Budget
Beginning Cash Balance	**$ 10,811**	**$ 27,004**	**$ 16,373**	**$ (10,631)**
Revenues				
Registration Fees	2,107	13,260	0	(13,260)
Conference Sponsorships & Advertising	0	0	0	0
Miscellaneous	0	0	0	0
Total Revenues	$ 2,107	$ 13,260	$ -	$ (13,260)
Expenses				
Personnel	0	0	0	0
Facility Rental	0	1,564	0	(1,564)
Equipment Rental (MRC)	0	0	0	0
Meals/Refreshments	0	0	0	0
Copying/Printing	0	429	0	(429)
Supplies	0	0	0	0
Honorarium(s)	0	0	0	0
Speaker/Facilitation	0	1,980	0	(1,980)
WSU Staff/Faculty	0	2,100	0	(2,100)
Travel	0	0	0	0
Gifts	0	0	0	0
Credit Card Fees	0	275	0	(275)
Travel (Staff)	0	0	0	0
Misc Expenses	0	0	0	0
Scholarships	0	0	0	0
Transfers	0	0	0	0
Other	8,429	0	0	0
Total Expenses	$ 8,429	$ 6,348	$ -	$ (6,348)
Net Income (Loss)	**$ (6,322)**	**$ 6,912**	**$ -**	**$ (6,912)**
Changes in Accounts Receivable	$ -	$ (3,719)	$ -	$ 3,719
Ending Cash Balance	**$ 4,489**	**$ 37,635**	**$ 16,373**	**$ (21,262)**