

# REGISTRATION FORM

**OSFA Annual Conference and Business Meeting - ADVANCED**

**DATE: Tuesday, May 9, 2017 TIME: 8:00 a.m.- 4:30 p.m.**

**LOCATION: Chemeketa Winema 4001 Winema Place NE; Salem, OR 97305**

**Instructions:** Please fill out the registration form and class selection form and return with payment to:

**OSFA, c/o Class Act Event Coordinators, P.O. Box 4122, Salem, Oregon 97302**

**Phone: (503) 371-8904 Fax: (503) 589-9166 or email to [respond@classactevents.net](mailto:respond@classactevents.net)**

Name: \_\_\_\_\_

Working Title: \_\_\_\_\_

Agency Name: \_\_\_\_\_ Agency Number: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

E-mail: \_\_\_\_\_ Daytime Phone: \_\_\_\_\_

**Registration:** Fee includes annual OSFA Membership (valid for 1 year)

Fee also includes Continental Breakfast and Buffet Lunch

Any governmental fiscal employee - **\$175 (due by May 1, 2017)**

Any full or part-time student, not a governmental employee - **\$160 (due by May 1, 2017)**

Any other person not eligible for Governmental or Student Membership - **\$210 (due by May 1, 2017)**

**Please make checks payable to OSFA- OSFA's Tax ID Number is 94-3099572**

## Annual Renewals and New Memberships

**\$30 Governmental Membership** - Any governmental fiscal employee

**\$15 Student Membership** - Any full or part-time student, not a governmental employee

**\$90 Associate Membership** - Any other person not eligible for Governmental or Student Membership

## WE ARE NOW ACCEPTING SPOTS CARD PAYMENTS OVER THE PHONE!

**Contact Class Act at (503) 371-8904**

We are no longer accepting PURCHASE ORDERS. We have updated our registration procedures. Attendance will be denied if payment is not received prior to the conference. We will send out a confirmation email when registration and payment have been received. If you do not receive confirmation, please contact Class Act Events.

## Summary Section

Annual Conference

(includes one year's membership fee)

\$ \_\_\_\_\_

\* OSFA Membership Fee only

(if you can't attend the May 9<sup>th</sup> 2017 Annual Conference)

\$ \_\_\_\_\_

Total Enclosed

\$ \_\_\_\_\_

## \* OSFA Membership Fee:

If you are not able to attend this year's annual conference, but would like to renew your annual OSFA Membership for the 2017/2018 year, please indicate the appropriate membership fee and return this form with your payment.

## Cancellation/Refund Policy

Visit [http://www.oregonstatefiscalassn.org/OSFA\\_RefundPolicy.htm](http://www.oregonstatefiscalassn.org/OSFA_RefundPolicy.htm) for a detailed cancellation/refund policy.

**One registration form per attendee please.**

**PLEASE COMPLETE THE CLASS SELECTION AND LUNCH SELECTION FORM ATTACHED**

## **ADVANCED Class Selections- Please select one class from each breakout session**

Conference registration and continental breakfast begin at 8:00am, followed by a keynote address at 9:00am. In order for us to provide adequate seating in each session, please select ONE class in each breakout section you plan to attend. Classes will be assigned on a first come, first served basis.

### **Keynote Speaker: Kacey McCallister "Rise Up"**

#### **Breakout Session #1 10:30 – 11:45a.m.**

\_\_\_\_\_ **Rise Up-Making the Most Out of Life**, presented by Kacey McCallister

In the race of life we have highs and lows. As we learn to defeat life's challenges we will be able to prevail against the trials we each face. In this session, we will look at ways to overcome obstacles that seem larger than life and come out stronger.

\_\_\_\_\_ **Death by PowerPoint**, presented by David Rohrer

Presenting technical information in a memorable way: Key strategies and techniques to effectively communicate your message without putting your audience to sleep.

\_\_\_\_\_ **Statewide Balancing – The Why, the How, and the WTH????**, presented by Michael Cutler

In this class we'll be looking at why you need G38 codes, and AGLs for some transactions. We'll then discuss how to determine what G38 or AGL you would use. Finally, we'll go through issues that SARS has seen over the years and discuss how to correct those errors. Fun and excitement for the entire group!!!

\_\_\_\_\_ **Bonding Basics – an Introduction to State Debt Programs**, presented by Jean Gabriel

This session will provide an overview of the State's bond programs, including the types of debt and basic concepts related to borrowing. In addition, it will cover the requirements related to tax-exempt governmental bonds. It will also outline the debt issuance process for Article XI-Q bonds, the most common bond program used by State agencies to finance the acquisition, improvement, or construction of capital assets.

**Lunch served from 12:00 – 1:30pm. Please check one:**

**Herb Roasted Chicken \_\_\_\_\_ or Stir Fry (vegetarian, vegan, dairy & gluten free) \_\_\_\_\_**

#### **Breakout Session #2 1:30 – 2:45p.m.**

\_\_\_\_\_ **ID Theft and Scam Prevention**, presented by Kevin Jeffries

In this presentation I will discuss what personal ID is and how it is used, lost, stolen and misused. I will also discuss ways that consumers can shield against ID theft and protecting their credit. We will also cover the true nature of a scam and how to spot them and avoid them. This is based off of the DOJ's "Six Signs it's a Scam."

\_\_\_\_\_ **PERS/OSGP Overview**, presented by Jack Schafroth

Learn how PERS and the Oregon Savings Growth Plan work together to provide you with financial security in retirement. Topics include; Tier 1,2, OPSRP and the IAP, Oregon Savings Growth Plan (OSGP) features and benefits, the importance of fees, investment overview, risk tolerance, rollovers, and savings strategies.

\_\_\_\_\_ **Uniform Guidance for Federal Grants**, presented by Clay Flowers

This training will provide a brief overview of the general requirements of Uniform Guidance, but the primary focus will be an in-depth demonstration of a risk assessment tool using a variety of circumstances an agency may face. This risk assessment tool was developed to inform the monitoring process and document compliance with the applicable sections of Uniform Guidance. The customizable risk assessment tool will be made available to agencies.

\_\_\_\_\_ **Ethics**, presented by Tammy Hedrick

1. Ethics law and administrative rules...what the rules are. 2. What is prohibited, what is not prohibited. 3. Definitions: Public Official, Use of Office or Position, Conflict of interest, etc. 4. Requirement for disclosure of conflicts of interest. 5. Enforcement of government ethics law. 6. Sanctions for violations. 7. Resources.

#### **Breakout Session #3 3:15 – 4:30p.m.**

\_\_\_\_\_ **Excel**, presented by Gabe Dougherty

Learn useful techniques in Excel to save time. In this course, explore seldom used formulas and other means of making disparate sources of data make sense.

\_\_\_\_\_ **Equity In the Workplace – Can't We All Just Do Our Jobs?**, presented by Cheryl Myers

If we sincerely aim to treat everyone fairly and we're so busy, why is there a need to take time out to focus on equity, diversity and inclusion? Consider the equity business case, take away data, statistics and have fun as an active participant at this interactive learning session.

\_\_\_\_\_ **State Budget 101 - - - What were those budgeteers thinking?**, presented by Brian DeForest.

Does state budget make sense to you? When the art of budgeting collides with the science of accounting, it seems like decision makers had no idea what was going on when they developed the state budget. This course provides: A brief history of the 2015-17 biennium budget for the State of Oregon; some background on the decision making process; what drives budget growth in some areas of the state budget while other areas seem to be suffering one cut after another; and, why it is a good idea for accountants and budgeteers to occasionally go out to coffee. By the end of the hour, you will understand that in fact, "Budgets make no cents."

\_\_\_\_\_ **Procurement Fraud**, presented by Jamie Ralls

This session provides an audit perspective on procurement fraud and internal controls. You will learn how audits are chosen, what auditors look for, what auditors find, and specific case examples of procurement fraud. The session will conclude with internal controls and fraud prevention.

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