California Society of Municipal Finance Officer’s is proud to offer the following courses for you to develop and enhance your knowledge, and provide you educational and professional resources.

INTRODUCTION TO GOVERNMENTAL ACCOUNTING  
(Minimum class size is 10 participants)  
Course Description: The course is designed for either an individual with some accounting background who is just entering the governmental field or an individual with governmental experience but not in the finance/accounting area.

The course introduces the seminar participant to basic terminology focusing first on the profit oriented entity. As the course progresses, the focus evolves to governmental terminology. The assumption is that the participant has had some experience in the corporate environment and thus will more quickly grasp the basic concepts because of familiarity. Once a basic understanding of accounting concepts is reached, these concepts can easily be applied to the unique requirements of the governmental area.

The Workshop will be presented in four phases:

- Basic Accounting Concepts
- The Accounting Process
- Governmental Accounting
- Role of the Budget

Course Instructor: Ahmed Badawi, a partner with Badawi & Associates, has volunteered his expertise and time to provide a great educational benefit to financial staff members in your organization.

Instruction Time: 9:00am – 4:30pm – 6 CPE units

Cost: $50 (includes seminar, materials and lunch)
INTERMEDIATE GOVERNMENT ACCOUNTING
(Minimum class size is 18 participants)

Course Description: This class is appropriate for individuals that have some accounting background, but may be new to the government sector, or for someone who has recently assumed responsibility for financial and accounting reporting. It is also appropriate for anyone interested in brushing up on basic government accounting skills. Each attendee will earn 8 CPE credits, and will receive a certificate of completion at the conclusion of the class.

The Workshop will be presented in five phases:

- Overview of Governmental Financial Statements
- Oversight Agencies
- Grant Accounting
- Year-end Close
- Current Events and Questions from the Class

Course Instructor: Susan Mayer

Susan Mayer is a retired municipal finance professional with twenty five years of public agency, auditing, and corporate accounting experience. She currently maintains a consulting practice providing financial project support to California Cites.

Susan received her Bachelor of Business in Accounting from the University of Minnesota and her Masters of Business Administration from Drake University. She started her professional career as a corporate financial analyst and earned her CPA license while auditing with Macias, Gini, and O’Connell, LLP. She has also worked for the Cities of Sacramento, Napa, Vallejo, and Stockton.

Susan is a member of the California Society of Certified Public Accountants and serves on its Government Accounting and Auditing Committee. She was appointed by the League of California Cities to the California Committee on Municipal Accounting. The Government Finance Officers have awarded her the designation of Certified Public Finance Officer.

Instruction Time: 8:00am – 5:00pm – 8 CPE units

Cost: $150 (includes seminar, materials and lunch)
STRENGTHEN YOUR FINANCIAL MANAGEMENT SKILLS
(Minimum class size is 10 participants)

Course Description: Each of these half-day training programs will provide you with practical tools on how you can strengthen your agency’s financial condition and improve fiscal decision-making through the power of policies and long-term financial planning.

Morning Session: 8:30am to 12:00pm: The Power of Fiscal Policies  Good times come and go, but your values shouldn’t – which is what fiscal policies are all about. Setting clearly articulated fiscal policies builds a strong foundation for protecting your agency’s long-term fiscal health. As recent economic events have shown, no agency is immune to economic downturns. But agencies with clear fiscal policies in place with a tradition of following them have a significant strategic edge over those that don’t. Policies make tough decisions easier by providing guidance both when times are good by preventing problems to begin with, as well as when the inevitable tough times do arrive.

Every agency is different, so when it comes to policies, “one size” is unlikely to fit all. This means there are no right answers, but there are “right questions.” This half-day session will discuss the key areas that fiscal policies should cover and approaches for approval and ongoing review. It will also provide sample policies and tips on getting started in preparing or updating fiscal policies.

Afternoon Session: 1:00pm to 4:30pm: Long-Term Financial Planning  In these challenging and ever-changing fiscal times, it seems like it’s hard to predict what’s going to happen next week, let alone next year – or even more daunting, five or ten years from now. So, why should local governments take the time and effort to prepare long-term financial plans? Stated simply, because making good resource decisions today requires taking into account their impact on your fiscal condition tomorrow. Developing good solutions requires knowing the size of the problem you are trying to solve: you can’t fix a problem you haven’t defined. And in this economic and fiscal environment, looking only one year ahead is almost certain to misstate the size and nature of the fiscal challenges ahead of you.

This half-day session will provide insights on how long-term financial planning will help you better navigate the fiscal challenges ahead of your agency and provide practical tips on how to prepare meaningful forecasts in light of uncertainty about economic and fiscal trends. The session will also provide useful examples of how to prepare long-term financial plans and present the results to policy makers.

Course Instructor: Bill Statler, former Director of Finance & Information Technology for the City of San Luis Obispo

Instruction Time:  Morning session: 8:30am – 12:00pm – 4 CPE  Afternoon session: 1:00pm – 4:30pm – 4 CPE

Cost:  One half-day seminar: $100 (includes seminar, materials)  Full-day seminar - morning and afternoon session: $150 (includes seminar, materials)  Lunch is on your own