



LEAGUE OF
**CALIFORNIA
CITIES**

MUNICIPAL FINANCE INSTITUTE

NAPA, CA

December 11-12, 2024



WEDNESDAY, DECEMBER 11

8:00 a.m. - 5:30 p.m.	Registration Open Vineyard Prefunction
8:00 a.m. - 5:30 p.m.	Premium Sponsor Tables Open Vineyard Prefunction
8:00 - 9:00 a.m.	Networking Breakfast Salon IV+VI, Meritage Ballroom
9:00 - 10:30 a.m.	2024 Playbook for Developments in Municipal Finance Law and Policy Salon IV+VI, Meritage Ballroom Hear the latest major developments for California city revenues. Learn about new laws, legal developments, risks, and opportunities that will affect your agency's finances. Opening Remarks: Daniel Choe, President, Fiscal Officers Department and Deputy Director of Administrative Services, Rocklin Moderator: Ben Triffo, Legislative Representative, League of California Cities Speakers: Michael G. Colantuono, Managing Shareholder, Colantuono, Highsmith & Whatley, PC Michael Coleman, Fiscal Policy Advisor, CaliforniaCityFinance.com
10:30 - 10:45 a.m.	Premium Sponsor Break Vineyard Prefunction
10:45 a.m. - 12:00 p.m.	The State of the Fund: An Update on the California Public Employees' Retirement System Salon IV+VI, Meritage Ballroom CalPERS Chief Financial Officer and Deputy Chief Actuary will provide an update on the current state of the pension fund and provide an overview of major issues facing the system. Moderator: Lisa Soghor, First Vice President, Fiscal Officers Department and Chief Financial Officer, Culver City Speakers: Randall J. Dziubek, Deputy Chief Actuary, CalPERS Michele Nix, Chief Financial Officer, CalPERS Simone Parker, Assistant Division Chief, Stakeholder Relations, CalPERS
12:00 - 1:00 p.m.	Networking Lunch Fountain Courtyard
1:00 - 2:15 p.m.	Cybersecurity Essentials for Cities Salon IV+VI, Meritage Ballroom In an era where digital threats are constantly evolving, the role of city finance directors in safeguarding public funds has become increasingly complex. This panel will provide city finance directors with essential insights into cybersecurity risks and strategies specifically tailored for cities large and small. Hear from private sector and city voices on recent trends in cybersecurity and AI. Panelists will discuss their experience working with state and federal partners to protect municipalities from cyberattacks and ransom. Moderator: Karin Schnaider, Assistant City Manager, Tracy Speakers: Benjamin Buecher, IT Business Solutions Manager, San Joaquin Regional Rail Marc Coopwood, VP, Public Sector Assistant Chief of Police (RET), Apex Technology Management Chris Hardy, Chief Technology Officer, Truckee George Passidakis, Director of Sales & Marketing, Apex Technology Management Norbert Ruijling, Chief Innovation Officer, Tracy

Find session materials online at www.calcities.org/MFI

WiFi Network: Cal Cities **Passcode:** League24

WEDNESDAY, DECEMBER 11

- 2:15 - 2:30 p.m. **Premium Sponsor Break**
Vineyard Prefunction
- 2:30 - 3:45 p.m. **Strategies for Sustainable City Funding: Exploring Innovative Solutions**
Salon IV+VI, Meritage Ballroom
This session addresses the critical challenge cities face in securing adequate funding for essential services and infrastructure. As financial pressures mount, exploring a diverse mix of funding opportunities becomes imperative. Panelists will delve into traditional and innovative funding mechanisms, including Parcel Taxes, Mello-Roos, Assessments, and the TIFIA 49 Initiative, focusing on transit and transit-oriented development projects. Gain a comprehensive understanding of these tools, including their application scope, implementation requirements, and ongoing management necessities. This practical session aims to equip city officials with the knowledge to navigate funding complexities confidently, ensuring long-term sustainability and growth for their communities.
Moderator and Speaker: Heidi Schrader, Administrative Services Director, Wildomar
Speakers: Bradley Neal, Partner, Stradling Yocca
Anna Sarabian, Principal, Fieldman, Rolapp & Associates, Inc.
Heidi Schoeppe, President/Managing Director/Chief Compliance Officer, Webb Municipal Finance, LLC
- 3:45 - 4:00 p.m. **Premium Sponsor Break**
Vineyard Prefunction
- 4:00 - 5:15 p.m. **The Role of the Public Sector CFO**
Salon IV+VI, Meritage Ballroom
The role of a city finance director is changing, more and more this role serves as the “CFO” of a city. City managers are looking for a skillset beyond managing the budget process. The public sector CFO must focus on economic development, revenue growth, expenditure management, project evaluation, and alternative financing methods. In addition to technical skills, those in this role must be able to communicate effectively with their city council. This session will discuss what is expected of the new public sector CFO from people that currently, or previously, served in that role, and provide career advice and insights into how to enhance your skillset to better serve in this capacity.
Moderator: Nick Kimball, City Manager, San Fernando
Speakers: Jessica Brown, Chief Financial Officer, Fontana
Julio Morales, Senior Managing Consultant, Kosmont Financial Services
- 5:15 - 6:15 p.m. **Joint Networking Reception with City Clerks and Fire Chiefs**
Estate Cave
Make new friends and catch up with old ones while enjoying delicious appetizers and tasty no host beverages during the evening networking reception. This joint reception is open to attendees from the Municipal Finance Institute, Fire Chiefs Leadership Seminar, and City Clerks New Law and Elections Seminar. It's the perfect opportunity to form support networks inside and outside your profession.

SHARE YOUR THOUGHTS!

Send us your feedback
on the Institute by
scanning this QR code.

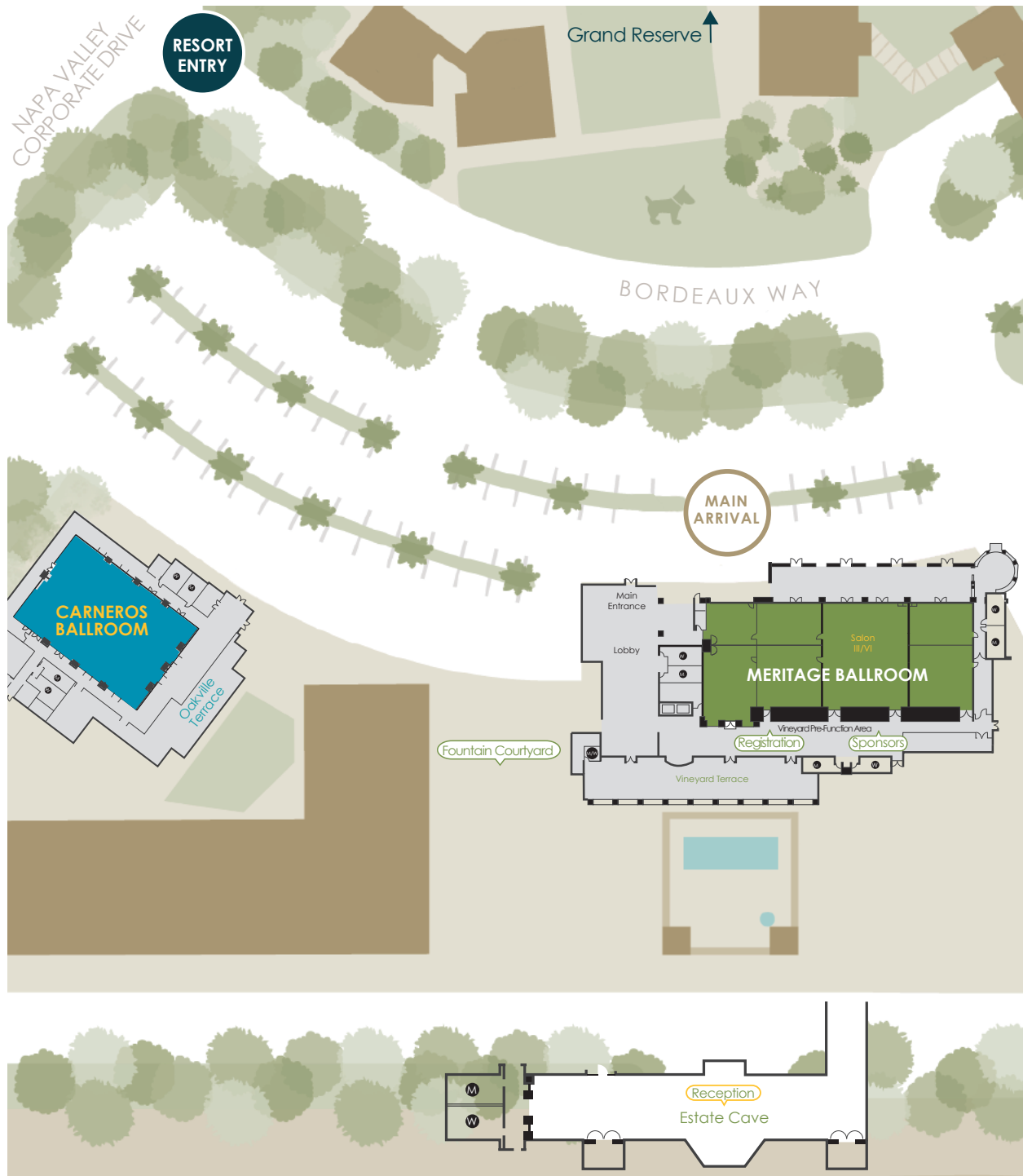


THURSDAY, DECEMBER 12

8:00 - 11:30 a.m.	Registration Open Vineyard Prefunction
8:00 a.m. - 12:30 p.m.	Premium Sponsor Tables Open Vineyard Prefunction
8:00 - 8:45 a.m.	Networking Breakfast Vineyard Terrace, Meritage Ballroom
8:30 - 9:00 a.m.	Cal Cities Sales Tax Working Group Update Salon IV+VI, Meritage Ballroom Hear the latest updates from the Cal Cities Sales Tax Working Group. Opening Remarks: Lisa Soghor, First Vice President, Fiscal Officers Department and Chief Financial Officer, Culver City Introductory Remarks: Robert Shull, Senior Director, Public Trust Advisors Speaker: Ben Triffo, Legislative Representative, League of California Cities
9:00 - 10:30 a.m.	Ethics for Fiscal Officers Salon IV+VI, Meritage Ballroom This session explores the ethical responsibilities of municipal fiscal officers in driving financial transparency and accountability. Attendees will examine the technical skills needed to discuss and align strategies with the city's long-term goals. The session will also address the importance of clear, ethical communication with both city staff and residents, fostering trust and understanding in budgetary decisions. Participants will leave with an enhanced understanding of how to make strategic, ethical choices that benefit their community. Opening Remarks: Daniel Choe, President, Fiscal Officers Department and Deputy Director of Administrative Services, Rocklin Moderator: Patricia Martel, West Coast Regional Director, ICMA Speakers: Anil Comelo, City Manager, St. Helena Paul Dohring, Mayor, St. Helena
10:45 - 11:30 a.m.	What is CalPERS Up to Now? Discussing Legal Trends, New Interpretations, and Areas to Watch in CalPERS Compliance Salon IV+VI, Meritage Ballroom With employers now held financially responsible for misreported compensation disqualified by CalPERS, compliance with the complex statutory, regulatory, and administrative guidance regulating pension benefits is more important than ever. This session will discuss common compliance issues, new administrative and informal guidance, interpretations, and trends to watch. The discussion will cover specific areas including compliance issues with special compensation items, the consequences of misreporting compensation, and emerging interpretations from CalPERS. Moderator: Scott Pettingell, Past President, Fiscal Officers Department and Assistant Finance Director, Roseville Speaker: Michael Youril, Partner, Liebert Cassidy Whitmore
11:30 a.m. - 12:30 p.m.	Closing General Session: Navigating California's Economy: An Expert Forecast with Dr. Jerry Nickelsburg Salon IV+VI, Meritage Ballroom, Meritage Ballroom For 60 years, UCLA Anderson Forecast has provided forecasts for economies across the country and is one of the most accurate, widely followed, and frequently cited in California. We are excited to announce that Dr. Jerry Nickelsburg, faculty director of the UCLA Anderson Forecast and renowned expert in economics, will close the 2024 Municipal Finance Institute with an economic update, specific to California. Closing Remarks: Daniel Choe, President, Fiscal Officers Department and Deputy Director of Administrative Services, Rocklin Keynote Speaker: Dr. Jerry Nickelsburg, Professor of Economics & Director UCLA Anderson Forecast, UCLA Anderson School of Management



FLOOR PLAN



2024 – 2025 Fiscal Department Officers

President, Daniel Choe, Deputy Director of Administrative Services, Rocklin

First Vice President, Lisa Soghor, Chief Financial Officer, Culver City

Past President, Scott Pettingell, Assistant Finance Director, Roseville

SAVE THE DATES:

2025 ANNUAL CONFERENCE AND EXPO
OCTOBER 8-10 | LONG BEACH CONVENTION CENTER

2025 MUNICIPAL FINANCE INSTITUTE
DECEMBER 10-11 | RENAISSANCE PALM SPRINGS HOTEL



LEAGUE OF CALIFORNIA CITIES

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