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CONTINUING PROFESSIONAL EDUCATION

Learning Objectives:
At the conclusion of this conference, participants will be able to:

• Recount changes to the roles and responsibilities of state auditors, state comptrollers and state treasurers as these roles have evolved during the past year.

• Identify and discuss new standards and rules from the government standards setting bodies and regulatory agencies.

• Apply practical information learned through case studies from peer offices and organizations.

• Discuss state government financial management as it relates to the broader, national fiscal outlook.

Level of Knowledge: Overview.

Education or Experience Prerequisite: No prerequisites required.

Advance Preparation: No advance preparation required.

CPE: 15 credits have been recommended for the conference.

Delivery Method: Group-Live. All sessions include Q&A opportunities.

Attendance Requirements: In order to obtain CPE credit for this event, participants must submit attendance verification codes provided during each session.

The National Association of State Auditors, Comptrollers and Treasurers is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: https://www.nasbaregistry.org/.
Dear NASACT Members, Corporate Affiliates and Guests,

It is my honor to be hosting the 104th NASACT Annual Conference in Scottsdale on August 17-21 at the Fairmont Scottsdale Princess Hotel. On behalf of the NASACT Training and Professional Development Committee and my Arizona co-hosts, Auditor General Lindsey Perry and State Treasurer Kimberly Yee, it is my pleasure to welcome you to Scottsdale.

The NASACT Annual Conference brings together state auditors, comptrollers and treasurers from around the nation for in-depth education on government financial management issues. This year we continue the tradition of exciting general sessions. We will kick off the conference with Professor Emeritus of ASU and national ethics expert Dr. Marianne Jennings discussing the value of creating and sustaining an ethical culture. We will hear from William Glasgall, senior vice-president and director of state and local initiatives from the Volcker Alliance, and Dan White, director of government consulting and fiscal policy research at Moody’s Analytics as they discuss looming economic and financial risks to state budgets. Gallup Consulting Director Faith Gaines will engage participants in understanding and applying their strengths to expand leadership capacity. Renowned fraud expert John Hall will present critical actions to proactively manage fraud prevention and detection. A distinguished panel of government technology experts will offer their advice on developing a strong cybersecurity program. And lastly, Beth Pearce, state treasurer of Vermont and incoming NASACT president, will lead the popular Emerging Issues Roundtable on the last morning of the conference.

In addition to these keynote speakers, there will be 28 concurrent sessions covering many of your areas of educational interest and a number of networking events.

Arizona is a beautiful state. With choices like the Grand Canyon, one of the seven natural wonders of the world, enchanting red rock and slot canyons, the beauty of the Sonoran desert, an abundance of fabulous golf courses, and delicious southwestern cuisine, I encourage you to take this opportunity to explore the many natural, historical and cultural offerings you will find in the Phoenix metropolitan area and throughout the state.

Also, don’t forget: NASACT members in good standing (or their designees) are eligible to receive up to $1,500 in travel assistance to attend this conference.

I hope you find value in the conference and that you leave with new friends, new ideas and a new perspective on how to best serve the citizens of your state.

D. Clark Partridge
President of NASACT
State Comptroller of Arizona
Accenture is committed to using innovation to improve the way the world works and lives, and we are honored to sponsor the 2019 NASACT Annual Conference.
### Acknowledgments

NASACT wishes to acknowledge the supporters of the 2019 NASACT Annual Conference. Thank you for your support!

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TREASURER
Manjo Ganeriwala
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Virginia

IMMEDIATE PAST PRESIDENT
Roger Norman
Legislative Auditor
Arkansas

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D. Clark Partridge
State Comptroller
Arizona

Lindsey Perry
Auditor General
Arizona

Kimberly Yee
State Treasurer
Arizona

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Pola Buckley (ME-A)
Suzanne Bump (MA-A)
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HANDOUTS
Session handouts will not be provided at the conference. Presentations will be available via NASACT’s conference app both during and after the conference (except in instances where the speaker does not provide the presentation to us in advance).

If you do not wish to use the app on a mobile device, there is also a website version that can be accessed via a computer browser at https://crowd.cc/nasact2019.

CONFERENCE APP
The NASACT Annual Conference app will place networking tools, schedules and session materials in the palm of your hand. Everything you find in the program brochure you can find on the app – and more.

How to Download
Prior to the conference, you should have received an email invitation containing download links and login information. However, if you did not receive the email, below are the links and instructions. If you want to access the app on multiple devices, you must go through this process for each one.

1. Enter website address or scan this QR code:
   On iPhone, iPad or Android, download & open the NASACT app in the Apple Store or Google Play Store or go to: https://crowd.cc/s/36YOw.

   On PC or Blackberry, go to https://crowd.cc/nasact2019.

2. Download the event, if prompted.

3. Click Log In
   This step is not necessary to see basic information in the app, but it IS necessary if you want to have access to all features in the app (such as networking with other attendees, for example).

4. Enter your First Name and Last Name

5. Enter Confirmation Code
   A 6-digit code will be emailed to you. You may use this code to set the app up once on any device. A separate code will be needed for other devices (request another code or go through steps 1-5 above on the other devices).

6. Continue to set up your profile as prompted.

WIFI
To access wifi in the meeting space, use the following credentials:

Network name: Fairmont Meeting
Password: NASACT2019

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<table>
<thead>
<tr>
<th>ATTIRE</th>
<th>ALLERGIES/DIETARY RESTRICTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>5K Fun Run/Walk: Athletic apparel</td>
<td>Attendees who notified us about food allergies or dietary restrictions that prevent them from eating the standard entree selection will be provided with a vegetarian/gluten-free meal. Substitutions may not be possible. Please make alternative meal arrangements if you have severe food allergies or specific dietary restrictions.</td>
</tr>
<tr>
<td>Pink Jeep Tour: Casual (comfortable shoes recommended)</td>
<td></td>
</tr>
<tr>
<td>Guest Program: Casual (comfortable shoes recommended)</td>
<td></td>
</tr>
<tr>
<td>Conference Sessions: Business casual</td>
<td></td>
</tr>
<tr>
<td>Sunday Night Event: Business casual</td>
<td></td>
</tr>
<tr>
<td>Monday Night Event: Business casual</td>
<td></td>
</tr>
<tr>
<td>Tuesday State Night Dinner: Cocktail or business</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AUDIO / VISUAL</th>
<th>CPE CODES &amp; EVALUATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio visual at the conference is sponsored by: BenefitScape &amp; Pentana Audit (Audit Software Brand)</td>
<td>NASACT is accredited as a provider of continuing professional education by the National Association of State Boards of Accountancy. CPE codes will be provided at the conclusion of each technical session. The code will be required to request CPE credit for the session. Watch for an email at the end of the conference which will include links to the CPE request form and the evaluation.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CELL PHONE POLICY</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Please be considerate of our speakers and other attendees. When you are in sessions, please silence or turn off your phone and leave the room if you need to answer a call.</td>
<td></td>
</tr>
</tbody>
</table>
LOST AND FOUND
If you’ve lost it, perhaps we’ve found it! Stop by the registration desk to turn in or claim lost items.

PHOTO DISCLOSURE
NASACT takes photos during this conference. By participating, you are granting NASACT permission to use your photo and name in association publications.

TRAVEL ASSISTANCE
NASACT members in good standing (or their designees) are eligible to receive up to $1,500 in travel assistance to attend the 2019 NASACT Annual Conference.
All assistance will be provided in the form of a reimbursement after the conference. Download the form at www.nasact.org/2019_nasact_annual.

TRANSPORTATION
Transportation at the conference is sponsored by:
Metaformers & CherryRoad Technologies

PRESENTATIONS & BIOS
Presentations and speaker bios can be found on the conference app. Speakers don’t always make their presentations available in advance.

WIFI
Complimentary wifi is available in the hotel sleeping rooms and the meeting space.
Use the following info to access wifi in the meeting space:
Network name: Fairmont Meeting
Password: NASACT2019

QUESTIONS OR COMMENTS
Questions or comments may be directed to NASACT staff onsite at the registration desk.
Written comments may also be sent to NASACT, 449 Lewis Hargett Circle, Suite 290, Lexington, KY 40503.

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### SATURDAY, AUGUST 17

<table>
<thead>
<tr>
<th>TIME</th>
<th>EVENT</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>2:00 - 5:00 p.m.</td>
<td>Registration</td>
<td>Palomino Foyer</td>
</tr>
<tr>
<td>4:00 - 10:00 p.m.</td>
<td>Welcome Reception #5332</td>
<td></td>
</tr>
</tbody>
</table>

### SUNDAY, AUGUST 18

<table>
<thead>
<tr>
<th>TIME</th>
<th>EVENT</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>5:00 - 7:00 a.m.</td>
<td>5K Fun Run/Walk</td>
<td>Meet in main hotel lobby</td>
</tr>
<tr>
<td>7:30 - 9:30 a.m.</td>
<td>Breakfast</td>
<td>Palomino 6-10</td>
</tr>
<tr>
<td>8:30 a.m. - 5:00 p.m.</td>
<td>Registration</td>
<td>Palomino Foyer</td>
</tr>
<tr>
<td>8:30 - 9:50 a.m.</td>
<td>NASACT Executive Committee</td>
<td>Arabian Room</td>
</tr>
<tr>
<td>10:00 - 10:50 a.m.</td>
<td>NASACT CARA</td>
<td>Arabian Room</td>
</tr>
<tr>
<td>11:00 a.m. - 7:00 p.m.</td>
<td>Pink Jeep Tour</td>
<td>Meet in main hotel lobby</td>
</tr>
<tr>
<td>2:00 - 5:00 p.m.</td>
<td>Hospitality Suite #5332</td>
<td></td>
</tr>
<tr>
<td>7:00 - 9:00 p.m.</td>
<td>President’s Night at Toro</td>
<td>Meet in main hotel lobby beginning at 6:45</td>
</tr>
<tr>
<td>9:00 - 10:30 p.m.</td>
<td>Hospitality Suite #5332</td>
<td></td>
</tr>
</tbody>
</table>

### MONDAY, AUGUST 19

<table>
<thead>
<tr>
<th>TIME</th>
<th>EVENT</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00 - 8:00 a.m.</td>
<td>Breakfast</td>
<td>Palomino 6-10</td>
</tr>
<tr>
<td>8:45 a.m. - 1:00 p.m.</td>
<td>Guest Program</td>
<td>Meet in main hotel lobby at 8:45 a.m.</td>
</tr>
<tr>
<td>8:00 - 9:35 a.m.</td>
<td>Opening Ceremonies &amp; General Session #1</td>
<td>Palomino 1-3</td>
</tr>
<tr>
<td>9:35 - 9:55 a.m.</td>
<td>Break</td>
<td>Palomino Foyer</td>
</tr>
<tr>
<td>9:55 - 11:10 a.m.</td>
<td>Concurrent Sessions #1-4</td>
<td>See pages 17 and 18</td>
</tr>
<tr>
<td>11:20 a.m. - 12:10 p.m.</td>
<td>Concurrent Sessions #5-8</td>
<td>See page 18</td>
</tr>
<tr>
<td>12:10 - 1:25 p.m.</td>
<td>Lunch</td>
<td>Palomino 6-10</td>
</tr>
<tr>
<td>1:25 - 2:40 p.m.</td>
<td>Concurrent Sessions #9-12</td>
<td>See pages 18 and 21</td>
</tr>
<tr>
<td>2:40 - 3:00 p.m.</td>
<td>Break</td>
<td>Palomino Foyer</td>
</tr>
<tr>
<td>3:00 - 3:50 p.m.</td>
<td>General Session #2</td>
<td>Palomino 1-3</td>
</tr>
<tr>
<td>4:00 - 4:45 p.m.</td>
<td>NASC, NSAA &amp; Treasurers’ Meetings</td>
<td>See page 22</td>
</tr>
<tr>
<td>6:30 - 8:30 p.m.</td>
<td>Musical Instrument Museum Event</td>
<td>Meet in main hotel lobby at 6:00 p.m.</td>
</tr>
<tr>
<td>8:30 - 10:30 p.m.</td>
<td>Hospitality Suite #5332</td>
<td></td>
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### TUESDAY, AUGUST 20

<table>
<thead>
<tr>
<th>TIME</th>
<th>EVENT</th>
<th>LOCATION</th>
</tr>
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<tbody>
<tr>
<td>7:00 - 8:30 a.m.</td>
<td>Breakfast</td>
<td>Palomino 6-10</td>
</tr>
<tr>
<td>8:15 a.m. - 1:00 p.m.</td>
<td>Guest Program</td>
<td>Meet in main hotel lobby at 8:15 a.m.</td>
</tr>
<tr>
<td>8:35 - 9:25 a.m.</td>
<td>General Session #3</td>
<td>Palomino 1-3</td>
</tr>
<tr>
<td>9:35 - 10:25 a.m.</td>
<td>Concurrent Sessions #13-16</td>
<td>See pages 22 and 24</td>
</tr>
<tr>
<td>10:25 - 10:45 a.m.</td>
<td>Break</td>
<td>Palomino Foyer</td>
</tr>
<tr>
<td>10:45 a.m. - 12:00 p.m.</td>
<td>Concurrent Sessions #17-20</td>
<td>See pages 24 and 25</td>
</tr>
<tr>
<td>12:00 - 1:05 p.m.</td>
<td>Lunch</td>
<td>Palomino 6-10</td>
</tr>
<tr>
<td>1:05 - 1:55 p.m.</td>
<td>Concurrent Sessions #21-24</td>
<td>See pages 25 and 26</td>
</tr>
<tr>
<td>2:05 - 2:55 p.m.</td>
<td>Concurrent Sessions #25-28</td>
<td>See pages 26 and 27</td>
</tr>
<tr>
<td>2:55 - 3:15 p.m.</td>
<td>Break</td>
<td>Palomino Foyer</td>
</tr>
<tr>
<td>3:15 - 4:05 p.m.</td>
<td>General Session #4</td>
<td>Palomino 1-3</td>
</tr>
<tr>
<td>4:15 - 5:00 p.m.</td>
<td>NASACT Business Meeting</td>
<td>Arabian</td>
</tr>
<tr>
<td>6:00 - 6:45 p.m.</td>
<td>Reception</td>
<td>Palomino Foyer</td>
</tr>
<tr>
<td>6:45 - 8:30 p.m.</td>
<td>Dinner &amp; Awards Ceremony</td>
<td>Palomino 4-7</td>
</tr>
<tr>
<td>8:30 - 11:00 p.m.</td>
<td>Entertainment &amp; Dancing</td>
<td>Palomino 4-7</td>
</tr>
</tbody>
</table>

### WEDNESDAY, AUGUST 21

<table>
<thead>
<tr>
<th>TIME</th>
<th>EVENT</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00 - 8:30 a.m.</td>
<td>Breakfast</td>
<td>Palomino 4-5</td>
</tr>
<tr>
<td>8:35 - 9:50 a.m.</td>
<td>General Session #5</td>
<td>Palomino 1-3</td>
</tr>
<tr>
<td>9:50 - 10:10 a.m.</td>
<td>Break</td>
<td>Palomino Foyer</td>
</tr>
<tr>
<td>10:10 - 11:00 a.m.</td>
<td>General Session #6</td>
<td>Palomino 1-3</td>
</tr>
</tbody>
</table>

Conclusion of Conference
DAILY SCHEDULE

SATURDAY, AUGUST 17

2:00 P.M. – 5:00 P.M.
REGISTRATION (Palomino Foyer)

4:00 P.M. – 10:00 P.M.
HOSPITALITY OPEN HOUSE (#5332)
Attire: Casual

SUNDAY, AUGUST 18

5:00 A.M. – 7:00 A.M.
5K FUN RUN/WALK Pre-registration is required. Attire: Casual
5:15 - 6:00: Race packet pick-up in main hotel lobby; race begins at 6:15.

7:30 A.M. – 9:30 A.M.
BREAKFAST (Palomino 6-10)
Sponsored by CLA (CliftonLarsonAllen) & Wells Fargo

8:30 A.M. – 5:00 P.M.
REGISTRATION (Palomino Foyer)

8:30 A.M. – 9:50 A.M.
MEETING OF NASACT’S EXECUTIVE COMMITTEE (Arabian Room)

10:00 A.M. – 10:50 A.M.
MEETING OF NASACT’S COMMITTEE ON ACCOUNTING, REPORTING & AUDITING (CARA) (Arabian Room)

11:00 A.M. – 7:00 P.M.
PINK JEEP TOUR Pre-registration is required. Attire: Casual
Sponsored by EY
Buses will depart promptly at 11:10; meet in main hotel lobby.

2:00 P.M. – 5:00 P.M.
HOSPITALITY SUITE (#5332)

7:00 P.M. – 9:00 P.M.
PRESIDENT’S NIGHT AT TORO Attire: Business Casual
Sponsored by Deloitte
Buses will run in a loop from the main hotel lobby beginning at 6:45 p.m.

9:00 P.M. – 10:30 P.M.
HOSPITALITY SUITE (#5332)

Concurrent session #26
Tuesday, August 20, 2:05 PM – 2:55 PM

Join speaker
David Natelson

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MONDAY, AUGUST 19

7:00 A.M. – 5:00 P.M.
REGISTRATION (Palomino Foyer)

7:00 A.M. – 8:00 A.M.
BREAKFAST (Palomino 6-10)
Sponsored by Infor

8:00 A.M. – 8:45 A.M.
OPENING CEREMONIES (Palomino 1-3)

Opening Remarks
D. Clark Partridge, President of NASACT and State Comptroller (AZ)

Color Guard & Singing of the National Anthem
Arizona State Troopers Honor Guard
Shelle Soelberg

Pledge of Allegiance
D. Clark Partridge, President of NASACT and State Comptroller (AZ)

Greetings from Mexico Delegation
Alejandro Villarreal, Finance Secretary, State of Morelos, Mexico

Welcome from Arizona
Doug Ducey, Governor (AZ) (video)
Lindsey Perry, Auditor General (AZ)
Kimberly Yee, State Treasurer (AZ)

8:45 A.M. – 9:35 A.M.
GENERAL SESSION (Palomino 1-3)

Keynote Address Sponsored by Kamakura Corporation

GS#1. How Leaders Can Create and Sustain an Ethical Culture
Field of study: Behavioral Ethics

An ethical culture is one that self-sustains and recruits its future leaders. Current research shows that employees stay with an organization when they are comfortable with its values. Ethical leaders have clear ethical values and then create and maintain an ethical culture through their actions, conduct, and decisions. We’ll look at the traits and practices of ethical leaders and how they avoid the treacherous territories of ethical missteps and lapses.

Dr. Marianne Jennings, Professor Emeritus, W.P. Carey School of Business, Arizona State University
Moderator: Lindsey Perry, Auditor General (AZ)

9:35 A.M. – 11:10 A.M.
CONCURRENT SESSIONS

CS#1. Platform ERP: Enabling the Intelligent Back Office (Palomino 4)
Field of study: Information Technology

According to our recent survey, 70 percent of government leaders believe their organization will be disrupted significantly by the pace of technology advancement as well as increasing citizen expectations for more personalized, digitized services. How should government best respond? Using live examples from the government of Alberta, this session will show how the intelligent back office—digitized applications provisioned through platform ERP—can enable precious government resources, capacity and investment to be redirected towards advancing the core mission of government—citizen service.

Martin J. Benison, Director, State and Local Government, Accenture
Pari Sabety, Senior Principal, Accenture
Moderator: Stacy Neal, Director of Accounting (MO)

CS#2. Using Technology Effectively Through Human-Centered Design (Palomino 1-2)
Field of study: Information Technology

In the public sector, success is about making government work for the people. Today, organizations are experiencing the pressure to digitally transform as their stakeholders, leadership, customers and citizens demand more. This session will uncover ways human-centered design helps organizations create engaging experiences through modern technology that addresses critical business needs and ultimately improve experiences and services for employees and citizens.

Angela Dillard, Statewide Accounting System Administrator (AZ)
Howard Dryver, Vice President, U.S. Government and Health Solutions, CGI
Adam Menzies, Vice President, Emerging Practices, CGI
Clark Partridge, State Comptroller (AZ)
Moderator: John Reidhead, Director, Division of Finance (UT)

CS#3. Get Ready Today for Your Workforce of Tomorrow (Palomino 5)
Field of study: Personnel/Human Resources

Technology and other global disruptors are changing the nature of jobs, skills, and work like never before — are you ready? Join this discussion to learn more about what you can do as government finance leaders to define your “Workforce of Tomorrow,” engage proactively with your human resources teams and across your organization and build a roadmap for the future. The time is now to prepare, plan, and lead workforce strategies that can help strengthen your future success.

9:55 A.M. – 11:10 A.M.
BREAK (Palomino Foyer)
Sponsored by Galvanize, SAP Concur & Workday
CS#4. No Customizations: Is That Even Possible? [Arabian]

Field of study: Information Technology

This session will address implementing software applications with minimal or even no customizations. This is critical as customizations add to implementation and maintenance costs and are one of the main reasons why states delay upgrading older systems. This subject is even more critical to understand as new software-as-a-service cloud applications have restrictions on traditional ways of customizing applications.

Bob Sabo, ERP/EPM Cloud Strategic Programs Director, Oracle Public Sector
Anne Godwin, Deputy State Controller, Statewide Accounting (NC)

Moderator: David Von Moll, State Comptroller (VA)

CS#5. Take Me to the Cloud! Idaho’s 30-Year Journey From On-Premise to SaaS [Palomino 4]

Field of study: Information Technology

Like most other states, Idaho has begun a journey to transform its systems infrastructure and support from on-premise to the cloud. The state has taken steps to extend the lives of its core financial systems, added niche applications, and recently acquired a software-as-a-service ERP system. In this session, we will discuss the factors and challenges that led Idaho to move from mainframe systems in the state data center to SaaS systems in the cloud. We will also touch on the functional, technical and contractual issues the state encountered along the way.

Nathan Frey, Partner, ISG Public Sector
Brandon Woolf, State Controller (ID)

Moderator: Cindy Farrell, Assistant Commissioner, Management and Budget (MN)

CS#6. Reduce Risk and Ensure Accuracy and Reliability of Data [Palomino 5]

Field of study: Information Technology

Alaska Division of Legislative Audit along with BerryDunn will discuss the challenges states face when they are tasked with auditing a newly-implemented, statewide ERP system with limited or no technical staff on the audit team. Using Alaska’s recent experience, the team will discuss what IT control tests should be incorporated into your audit plan during the conversion year, along with ongoing testing, so that you can reduce risk and ensure the accuracy and reliability of data reporting.

Brittany Abbott, In-Charge Auditor (AK)
Bill Brown, Principal, BerryDunn
Vanessa Cayer, Manager, BerryDunn
Kris Curtis, Legislative Auditor (AK)

Moderator: April Renfro, Audit Division Manager (ID)

CS#7. Audit Standards Update [Palomino 1-2]

Field of study: Auditing (Governmental)

This session will cover key changes contained in the 2018 Government Auditing Standards as well as key implementation issues. Important developments to audit standards from the AICPA’s Audit Standards Board will also be covered.

Jim Dalkin, Director, U.S. Government Accountability Office

Moderator: Gerry Boaz, Technical Manager, Department of Audit, Office of the Comptroller of the Treasury (TN)

CS#8. Path to Success: Steps Toward Statewide Grant Reporting Compliance [Arabian]

Field of study: Finance

Speakers in this session will share the work both planned and completed to make the state of Illinois compliant with the DATA Act, GREAT Act, and Uniform Grant Guidance through legislation and standardization of grant management data collection inside an enterprise grant management platform. Gain a better understanding of the necessary steps to take in order to centralize grant processes at the state level, as well as for those of state agencies and recipients of state funding.

Adam Roth, Founder and President, AmpliFund
Carol Kraus, Director of the Grant Accountability and Transparency Unit, Office of Management and Budget (IL)

Moderator: John Traylor, Executive Deputy Comptroller for Operations (NY)

CS#9. Fraud and Improper Payments [Arabian]

Field of study: Auditing (Governmental)

First hear about Facing the New Faces of Fraud: Tackling Today’s Biggest Security and Electronic Payment Threats from representatives from the New Mexico State Treasurer’s Office and Wells Fargo. You will hear about various
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fraud threats that pose a risk to your organization like Business Email Compromise (BEC), which continues to be the cyber payment fraud scheme of choice, and Online Account Takeover (ATO). Speakers will share best practices to identify fraud and protect your organization.

Next, speakers from Galvanize and the Arizona Department of Administration will address Fraud: In an Ever-Changing Risk Environment, Get Your Data Talking. Learn how Arizona got started, and how they are using risk-based assessments and analytics to identify trends, patterns, anomalies, and abnormal relationships in data as an effective tool for combating fraud.

Charmaine Cook, State Cash Manager, Office of the State Treasurer (NM)
John Kolar, Vice President and Manager of Fraud Prevention Education, Training and Process, Wells Fargo
Bonnie Lai, Public Sector Product Manager, Galvanize
Crystal M. Messner, Statewide Internal Audit Manager (AZ)
Clark Partridge, State Comptroller (AZ)
Moderator: Dale Folwell, State Treasurer (NC)

CS#10. Demystifying the Cloud (Palomino 4)

Field of study: Information Technology
Learn how governments are successfully moving to the cloud. Issues and challenges (e.g., costs and security), best practices on achieving actual results and effectiveness, and lessons learned from states that have migrated to the cloud will be covered.

Ray Zaso, Principal, Advisory, Enterprise Solutions, KPMG
Doug Cotnoir, State Controller (ME)
Moderator: Pola Buckley, State Auditor (ME)

CS#11. GASB Update (Palomino 1-2)

Field of study: Accounting (Governmental)
As Dave Vaudt enters his last year as the chairman of the GASB, this is an opportunity for the GASB panel to reflect back on how governmental accounting has progressed during his term and to look forward on how governmental accounting may change in the future. In addition to the financial reporting model, revenue and expense recognition, and the disclosure framework, topics that will be addressed include postemployment benefits, fiduciary activities, and leases.

David Vaudt, Chairman, Governmental Accounting Standards Board
David Bean, Director of Research and Technical Activities, Governmental Accounting Standards Board
Kristopher Knight, Deputy Secretary of State (DE) and Governmental Accounting Standards Board Member
Moderator: Alan Skelton, State Accounting Officer (GA), and Vice Chair of the Governmental Accounting Standards Advisory Council

CS#12. Federal Issues (Palomino 5)

Field of study: Finance
This session will address a variety of important federal issues. First, representatives from U.S. Treasury’s Do Not Pay Program and the Oregon Division of Audits will discuss how they are partnering to determine how best to address improper payments in state-administered, federally-funded programs using data analytics. Next, learn about the latest developments in the Treasury Offset Program (TOP), including a change to real-time reporting of new debts submitted and any offsets taken. This session will conclude with an update from OMB on a myriad of issues impacting federal grant recipients including results-oriented accountability goals contained in the President’s Management Agenda.

Ian Green, Principal Auditor, Audits Division (OR)
Glenn Flowers, Program Manager, Analysis and Program Implementation Branch, U.S. Treasury Bureau of Fiscal Services
Tricia Long, Director, Do Not Pay Business Center, U.S. Treasury, Bureau of Fiscal Services
Gil Tran, Senior Policy Analyst, Office of Federal Financial Management, U.S. Office of Management and Budget
Moderator: Suzanne Bump, Auditor of the Commonwealth (MA)

2:40 P.M. – 3:00 P.M.
BREAK (Palomino Foyer)
Sponsored by Bank of America Merrill Lynch, BerryDunn & RSM

3:00 P.M. – 3:50 P.M.
GENERAL SESSION
GS#2. Risks to State Budgets in FY 2020, 2021 and Beyond: Identification, Quantification and Improvement (Palomino 1-3)

Field of study: Economics
This panel will discuss looming economic and fiscal risks to state budgets, as identified by the Volcker Alliance and Moody’s Analytics, as well as opportunities to improve budgetary practices. The presentations will draw upon the Volcker Alliance’s exclusive state budget grades and other assessments as well as Moody’s Analytics’ economic forecasts and broad experience working with states and municipalities.

William Glasgall, Senior Vice President and Director, State and Local initiatives, The Volcker Alliance
Dan White, Director, Government Consulting and Fiscal Policy Research, Moody’s Analytics
Moderator: Kimberly Yee, State Treasurer (AZ)

3:50 P.M. – 4:00 P.M.
ROOM CHANGE
TUESDAY, AUGUST 20

7:00 A.M. – 5:00 P.M.
REGISTRATION (Palomino Foyer)

7:00 A.M. – 8:30 A.M.
BREAKFAST (Palomino 6-10)
Sponsored by OpenGov

8:30 A.M. – 8:35 A.M.
OPENING REMARKS (Palomino 1-3)
   D. Clark Partridge, NASACT President and State Comptroller (AZ)

8:35 A.M. – 9:25 A.M.
GENERAL SESSION (Palomino 1-3)
GS#3. Start with Talent, Finish with Strength
Field of study: Personnel/HR

In this engaging discussion, Gallup Consulting Director Faith Gaines will lay the foundation for attendees to not only understand strengths-based development, but how to take immediate and meaningful action with their unique talents. From Gallup’s State of the American Workplace report, the dominant performance challenge facing leaders in the U.S. is transitioning their role from a “boss” to that of a “coach”, and leaders must first understand their own unique talents in order to coach their employees. This keynote will lay the foundation for attendees to take meaningful steps in that important direction. This talk will outline the core philosophy of Strengths based development, how to productively apply one’s own unique talents and how to understand one’s CliftonStrengths® profile. Most importantly, this keynote will shift attendee understanding of their role as leaders in their workplaces, communities and families.

Faith Gaines, Director of Consulting, Gallup
Moderator: D. Clark Partridge, NASACT President and State Comptroller (AZ)

9:25 A.M. – 9:35 A.M.
ROOM CHANGE

9:35 A.M. – 10:25 A.M.
CONCURRENT SESSIONS

CS#13. Economic Risks on the Horizon? Red Flags and Mitigation
(Arabian)
Field of study: Economics

Kamakura Corporation’s monthly Troubled Company Index® is based on a quantitative model that incorporates macroeconomic, market and financial inputs to create a term structure of default probability. This macroeconomic model indicates a heightened risk of a credit downturn ahead of us. Hawaii’s Department of Business, Economic Development and Tourism produces economic forecasts that contribute to short-term and long-term statewide planning incorporating microeconomic modeling techniques. This session will discuss these respective economic modeling approaches, the implications of the results and their implications for policy makers, businesses and investors.

Martin M. Zorn, President and Chief Operating Officer, Kamakura Corporation
Dr. Eugene Tian, Chief Economist, Department of Business, Economic Development and Tourism (HI)
Moderator: Lynne Riley, State Treasurer (GA)

CS#14. Robotic Process Automation in the Public Sector: Achieving Results
(Palomino 1-2)
Field of study: Finance

By now, you have likely heard of robotic process automation (RPA), but do you know what RPA really is and how your organization can benefit from it by growing your digital workforce? From automating financial processes to automating human resource practices, RPA can transform your everyday business activities. Join this session to learn more about RPA, how it can transform your organization and the steps you can take to get started with RPA today.

Chris Wetmore, Principal, RSM
Ernie Almonte, Partner, RSM
Speaker & Moderator: Beth Wood, State Auditor (NC)
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CS#15. GASB 87: Are You REALLY Ready? (Palomino 4)
Field of study: Accounting (Governmental)
Learn about the nuances and challenges implementing GASB 87 will bring to the preparation of the annual CAFR as well as the impact on component units. Included will be helpful tips to consider before getting started, including software tools, review of policies and procedures, etc.
- Tera Klutz, Auditor of State (IN)
- Katherine Lai, Partner, Crowe LLP
- Tom Reznicek, Principal, Crowe LLP
Moderator: Mike Corricelli, Chief of Accounts (TN)

CS#16. The Talent Imperative: Recruiting, Retaining, and Motivating Employees (Palomino 5)
Field of study: Personnel/HR
Several forecasts have shown the U.S. will fall short for workers with postsecondary education by 2020, with accounting and finance already sitting at number five of the Top 10 jobs employers are having difficulty hiring for. This session will explore best practices for a comprehensive talent management system, including recruiting, onboarding, developing, and motivating employees.
- Matt Ceppi, Consulting Principal, CLA
- Scott Frank, Director of Performance and IT Audit, Office of the State Auditor (WA)
Moderator: Kelly Rogers, Deputy Treasurer for Policy and Public Finance (RI)

10:25 A.M. – 10:45 A.M.
BREAK (Palomino Foyer)
Sponsored by First Data, Tyler Technologies & Workiva

10:45 A.M. – 12:00 P.M.
CONCURRENT SESSIONS
CS#17. Economic Report for the States (Palomino 1-2)
Field of study: Economics
This session will address a variety of economic trends and emerging issues impacting the states. First, hear an overview of the current fiscal situation in the states and the serious financial management problems state government leaders must face in the coming years.
S&P Global Ratings has ratings on all states, but not all states are facing the same credit conditions. This session will explore the impacts economies have on states and highlight emerging risks driving discussions of credit.
GAO’s 2018 State and Local Government Fiscal Outlook Update suggests the state and local sector will face challenges during the next 50 years. This presentation will discuss these findings, recent federal policy changes and their potential implications for state and local policymakers.
- John T. Hicks, Executive Director, National Association of State Budget Officers
- Geoffrey E. Buswick, Managing Director and Sector Leader, U.S. Public Finance, S&P Global Ratings
- Michelle Sager, Director, Strategic Issues, U.S. Government Accountability Office
Moderator: Manju Ganeriwala, State Treasurer (VA)

CS#18. Transparency 2.0: Leveraging Transparency Initiatives to Enhance Outcomes (Arabian)
Field of study: Finance
Transparency initiatives are foundational to building public trust and achieving your communication objectives. However, tremendous value lies in utilizing this data to better achieve statewide efficiencies and monitor financial health. This session focuses on how you can further extend transparency initiatives to analyze your state’s financial health, monitor fiscal indicators, reduce FOIA requests, and streamline report generation to further improve key outcomes.
- John Dougall, State Auditor (UT)
- Tim Melton, Vice-President for Sales, OpenGov, and Former State Representative (MI)
- Brandon Woolf, State Controller (ID)
Moderator: Catherine Byrne, State Controller (NV)

Field of study: Finance

Intelligent Automation is unlocking the most valuable asset, your time. As a collection of capabilities, from Robotics Process Automation (RPA) to Artificial Intelligence (AI), Intelligent Automation is redesigning how work is performed. Delivering a portfolio of benefits, Intelligent Automation is not only creating capacity for your team members, but allowing them to focus on more strategic, stimulating, and customer-facing activities.

This presentation will cover Intelligent Automation overview and trends; demonstration and videos; what the states are doing; implementation considerations; and tips to getting started.

Brad Duncan, Principal, U.S. State and Local Leader, EY
Andrew Maylor, Comptroller of the Commonwealth (MA)
Aaron Rakes, Intelligent Automation Leader, EY
Alan Skelton, State Accounting Officer (GA)
Moderator: John Geragosian, State Auditor (CT)

CS#20. Importance of Security and Financial Controls in the Age of SaaS (Palomino 5)

Field of study: Auditing (Governmental)

As state organizations evaluate and plan their move from legacy on-premise business applications to next-generation cloud platforms, risks around compliance and security are heightened. Most public sector organizations share these concerns and require proven options before taking the leap to the cloud. To further reduce risk, many organizations are considering the benefits of a federal program that provides a standardized approach to security assessment and authorization including automated financial controls. The Federal Risk and Authorization Management Program, or FedRAMP, ensures cloud offerings are secure enough for even the strictest agencies, and has application at all levels of government.

The panel will discuss the rationale for states to consider financial controls applications that are authorized, secure cloud applications that are integral to cloud migration strategies.

Bob St. Ledger, Director, Infor
Hardik Bhatt, Leader, Digital Government, Amazon Web Services
Emmanuel Twum, Vice President, New River Systems
Chris Ballister, Director, Grant Thornton
Moderator: Greg Griffin, State Auditor (GA)

12:00 P.M. – 1:05 P.M.
LUNCH (Palomino 6-10)
Sponsored by KPMG

1:05 P.M. – 1:55 P.M.
CONCURRENT SESSIONS


Field of study: Auditing (Governmental)

The importance of performance audits continues to gather momentum. Best practices and “game changers” in performance auditing will be covered in this informative session.

Eric Berman, Partner, Eide Bailly
Jodi Daugherty, Director of Government Services, Eide Bailly
Speaker & Moderator: Justin Stowe, Legislative Post Auditor (KS)

CS#22. Navigating Your Way Through the Relationship Between Bond Documents, Financial Statements and Transaction Cashflows (Arabian)

Field of study: Finance

Whether you work in the Debt Management Department, Comptroller’s Office, Auditor’s Office or Legal Department, this session is for you! We will provide a crash course in understanding key bond documents involved in a bond issuance, including a review of the purpose of each document, key sections and how bond documents are integrated with financial statement and transaction related cashflows.
Maulin Shah, Director – Municipal Markets, Bank of America Merrill Lynch
Poonam Patidar, Partner, Mintz, Levin, Cohn, Ferris, Glovsky and Popeo
Sue Perez, Deputy Treasurer, Office of the State Treasurer (MA)
Moderator: James MacDonald, First Deputy Treasurer, Office of the State Treasurer (MA)

CS#23. Moving State Government Effectively to the Cloud
(Palomino 4)

Field of study: Information Technology
In this session, presenters will describe how state governments can move effectively to the cloud. Multi-tenant SaaS considerations and government business processes re-engineering and re-design will also be covered.

Lawrence Fitch, Principal Value Manager, Workday
J.R. Sloan, Chief Technology Officer and Deputy CIO, ADOA - Strategic Enterprise Technology (AZ)
Moderator: Cheryl Grey, Administrator, State Financial Services Division (MT)

CS#24. Operational Efficiency Opportunities in State Government Payments: An In-Depth Review of the State of New York Payment Flow Study
(Palomino 5)

Field of study: Information Technology
New York recently embarked on a detailed statewide analysis of current payment flows, methods of payment and recipient types to identify opportunities to enhance security, lower cost, increase convenience and provide better data. This session will detail those findings and provide opportunities to modernize payments across state agencies.

John Corbett, Director of Financial Operations (NY)
Greg Hamilton, Director, Mastercard
Theodore Iacobuzio, Managing Director, Custom Research and Consulting, Mercator Advisory Group
John Traylor, Executive Deputy Comptroller for Operations (NY)
Moderator: Jay Cleveland, Chief Operating Officer (IA)

1:55 P.M. – 2:05 P.M.
ROOM CHANGE

2:05 P.M. – 2:55 P.M.
CONCURRENT SESSIONS

CS#25. How Data and Insights Improve Operations and Transparency
(Palomino 5)

Field of study: Finance
Auditors, comptrollers, and treasurers are among the public sector professionals who face increasing pressure to do more with less. Join this panel discussion and hear from finance leaders who have leveraged data to connect performance to outcomes, improve financial oversight, and share operational insights across departments and agencies. Using data is not only more doable than many people think, it is the key to overcoming challenges and solving problems at all levels of government (and in governments of all sizes) through increased insight and improved operations.

Kevin Lembo, State Comptroller (CT)
Kyle Hall, Senior Product Manager, Data and Insights, Tyler Technologies
Moderator: Roger Norman, Legislative Auditor (AR)

CS#26. Cybersecurity: Are You Prepared?
(Palomino 4)

Field of study: Information Technology
This presentation reviews recent trends related to cyber security incidents ranging from denial of service, privileges/data access, malware and ransomware, physical security, mobile device security, hardware vulnerabilities, and nation-state actors, and will include a review of risk, audit and technologies that are used to secure the lifecycle for handling payment and other sensitive data. Representatives from Arizona and California will also provide perspectives from experiences in their states.

David Natelson, Vice-President, Government Solutions, Education, Non-Profit and Utility Vertical (East USA), First Data
David Duarte, CIO, Office of State Treasurer (CA)
Tim Roemer, CISO, ADOA - Strategic Enterprise Technology (AZ)
Moderator: John Dougall, State Auditor (UT)

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Field of study: Auditing [Governmental]

As spending becomes increasingly decentralized and employees across your organization are empowered to make more and more spending decisions on their own, your risk of fraud increases. Manual processes and a lack of integration between systems make it nearly impossible to manage regulatory compliance, policy compliance and fraud. Does your auditing process catch 100% of expense fraud? Is your organization able to successfully track all of your spend to detect and manage fraud and ensure compliance? Learn how to address these critical issues in this session.

Mike Dover, Director, Client Development Public Sector, SAP Concur
Kathleen Baxter, State Comptroller (AL)
Moderator: Daryl Purpera, Legislative Auditor (LA)


Field of study: Finance

As a leader, a big part of your job is managing partnerships with multiple departments and agencies that have the data your team needs to be effective. Join this session to learn about best practices for implementing data sharing initiatives, how the state of Georgia is addressing the challenge, and FAQs.

Dan Hughes, Government Services Manager, Bronner Group, LLC
Michael Johansen, Senior Manager of Product Marketing, Workiva
Alan Skelton, State Accounting Officer (GA)
Moderator: Andrew Maylor, Comptroller of the Commonwealth (MA)

2:55 P.M. – 3:15 P.M.
BREAK [Palomino Foyer]
Sponsored by Crowe LLP, Mastercard & Amplifund Public Sector

3:15 P.M. – 4:05 P.M.
GENERAL SESSION [Palomino 1-3]

GS#4. Fraud Prevention and Detection: Three Critical Actions
Field of study: Auditing (Governmental)

The fraud risk management expectations on state audit, comptroller and treasury professionals grow every day. And with everything else that’s on our plates, there’s a genuine fear that fraud will slip through the cracks in our prevention efforts and blossom into major events if not found right away.

In this session, participants will identify how to manage fraud risks efficiently – without adding to your existing workload; discover the three most critical actions to take to deter and prevent wrongdoing and fraud; explore common sense steps to find fraud fast; and learn exactly what you need to do every day to manage your fraud risks.

John Hall, President, Hall Consulting, Inc.
Moderator: Elaine Howle, State Auditor (CA)

4:05 P.M. – 4:15 P.M.
ROOM CHANGE

4:15 P.M. – 5:00 P.M.
NASACT BUSINESS MEETING [Arabian]

Open to Members and Members’ Staff Only

NASACT members and members’ staff are encouraged to attend the business meeting. Reports will be given by chairs of NASACT’s committees and the 2019-20 Executive Committee will be elected by the membership.

Presiding: D. Clark Partridge, President of NASACT and State Comptroller (AZ)
6:00 P.M. – 11:00 P.M.
STATE NIGHT DINNER (Palomino Foyer/4-7) Attire: Cocktail or Business
Sponsored by Accenture
Join us for the State Night Gala! NASACT awards will be presented and the 2019 class of the NASACT Hall of Fame will be announced.

6:00 p.m. Reception
6:45 p.m. Dinner
2020 Host State Drawing
2019 NASACT Awards
Hall of Fame Induction Ceremony
8:30 p.m. Entertainment & Dancing

WEDNESDAY, AUGUST 21

7:00 A.M. – 8:30 A.M.
BREAKFAST (Palomino 4-5)
Sponsored by Eide Bailly & ISG Public Sector

8:30 A.M. – 8:35 A.M.
OPENING REMARKS (Palomino 1-3)
D. Clark Partridge, State Comptroller (AZ)

8:35 A.M. – 9:50 A.M.
GENERAL SESSION (Palomino 1-3)
GS#5. Doomed by Design or Poised for Success: Assessing the Foundation of your Cybersecurity Program
Field of study: Information Technology
Effectively managing cyber risks requires strong technical leadership and a government-wide commitment to success. Cybersecurity leaders are in high demand because they must have the knowledge and skills to bring together talented professionals, sophisticated tools, and processes in an environment where threats change daily. Leading a government security program is a daunting challenge, but program success also requires financial and organizational support from executive branch and legislative leaders.

The objective of this session will be to help the audience address whether their cybersecurity program is poised for success. Our expert panel will share their insights into critical security program design, governance, and funding issues.

Chris Buse, Deputy Legislative Auditor and Former Chief Information Security Officer (MN)
Dan Lohrmann, Chief Strategist and Chief Security Officer, Security Mentor, and Former Chief Information Security Officer (MI)
Aaron Munn, Chief Information Security Officer, Office of State Auditor (WA)
Doug Robinson, Executive Director, National Association of State Chief Information Officers
Moderator: Pat McCarthy, State Auditor (WA)

9:50 A.M. – 10:10 A.M.
BREAK (Palomino Foyer)
Sponsored by American Express, Bronner, Plante Moran, S&P Global Ratings

10:10 A.M. – 11:00 A.M.
GENERAL SESSION (Palomino 1-3)
GS#6. Emerging Issues Roundtable
Field of study: Finance
Always one of the most popular sessions of the conference, the emerging issues roundtable provides NASACT members the opportunity to discuss the most pressing, cross-cutting issues of the day.

Moderator: Beth Pearce, State Treasurer (VT)

11:00 A.M. – 11:10 A.M.
CLOSING REMARKS (Palomino 1-3)
Beth Pearce, State Treasurer (VT)

NASACT HALL OF FAME
The NASACT Hall of Fame was created in 2015 to recognize an elite group of individuals who over their professional careers have made major and enduring impacts on state government financial management.

2018 Inductees
James F. Antonio
Tom L. Allen
Minnie Mitchell
J.D. Williams

2017 Inductees
Robert H. Attmore
Harlan E. Boyles
Harvey C. Eckert

2016 Inductees
W. Daniel Ebersole
Nancy K. Kopp
Edward J. Mazur

2015 Inductees
Louis G. Goldstein
Frank L. Greathouse
William R. Snodgrass
Relmond P. Van Daniker
MONDAY, AUGUST 19
TALIESEN WEST & LUNCH AT OREGANO’S

8:45 a.m. – Meet in main lobby of the hotel
9:00 a.m. – Buses depart
9:30 - 11:15 a.m. – Tour Taliesen West
11:30 a.m. - 12:45 p.m. – Lunch at Oregano’s
1:00 p.m. – Estimated return to hotel
Afternoon – Free time at the resort

TUESDAY, AUGUST 20
DESERT BOTANICAL GARDEN

8:15 a.m. – Meet in main lobby of the hotel
8:30 a.m. – Buses depart
9:30 - 10:30 a.m. – Tour Desert Botanical Gardens
10:30 - 11:30 a.m. – Shopping in Old Scottsdale
11:30 - 12:45 – Lunch at Arcadia Farms
1:00 p.m. – Estimated return to hotel
Afternoon – Free time at the resort

Please wear cool clothing and comfortable shoes. We suggest bringing an umbrella for shade, especially for the Tuesday excursion.

Registered guests may also attend all conference breakfasts, social events and the hospitality suite.

Taliesen West

Lunch in downtown Scottsdale.

Cactus flowers in bloom at the Desert Botanical Garden.
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UPCOMING EVENTS

2019

NSAA IT Workshop & Conference
September 24-27, Grand Rapids, Michigan

Webinar: Demystifying the Cloud
October 3

2020

NASC Annual Conference
March 17-19, Branson, MO

NASACT Training Issues Workshop
April 20, Tacoma, Washington

NASACT Emerging Leaders Conference
April 21-23, Tacoma, Washington

NSAA Annual Conference
June 2-5, Boston, Massachusetts

NASACT Annual Conference
August 22-26, Burlington, Vermont

NSAA IT Workshop & Conference
September 28-October 1, Salt Lake City, Utah