

ON DEMAND WEBINAR SERIES

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CURRICULUM

Audit Essentials

- ✓ Review of audit theory and best practices
- ✓ Project plan/audit calendar overview
- ✓ What questions will the auditor have and how to be prepared for them
- ✓ Review of key working papers

Developing a Long-Term Tax Strategy

- ✓ New MGA changes related to commercial subclasses and the residential/commercial split ratio
- ✓ Developing a Tax Rate Bylaw
- ✓ Tax Rate Bylaw math explained (assessment, mill rate, taxation revenue)
- ✓ How to develop a long-term tax strategy
- ✓ Public engagement, measuring and justifying tax increases and presenting tax increases/strategies to Council and the public.



Reporting: Management and Year End

- ✓ Management and financial reporting best practices
- ✓ Key concepts and techniques for a successful and complete cut off
- ✓ A year-end project plan and calendar
- ✓ Quality monthly and year-end reporting for Executive Administration, Council and the public

Inter-municipal Collaboration Framework

- ✓ New MGA requirements –legislation
- ✓ Urban/rural perspective (regional outlook)
- ✓ Finance implications
- ✓ Inter-municipal operating agreements (fire, recreation, FCSS, economic development etc.)
- ✓ Shared capital costs for regional projects (cost models, analysis, negotiation)
- ✓ Communicating the framework with administration, Council and the public

CURRICULUM

Capital Budgeting 101

- ✓ Best practices for capital planning
- ✓ What is required in a long-term capital plan and capital budget.
- ✓ Short and long-term funding concepts explained
- ✓ Developing a capital plan with a strategic emphasis
- ✓ Capital budget decision-making (how-to's and best practices)



Treasury and Risk Management 101

- ✓ Best practices for financial controls
- ✓ Tax collection
- ✓ Cash flow management
- ✓ Banking RFP. Importance and how to's
- ✓ Investment strategies for municipal financial assets
- ✓ Reserves and restricted/un-restricted surplus strategy/policy

Leadership and Management: Skills critical for success

- ✓ Review of best practices for both leadership and management – Municipal specific
- ✓ Leading and managing to success
- ✓ The key differences between leadership and management and why both are critical
- ✓ How leadership and management can be utilized by the finance officer to enhance organizational and career success
- ✓ Based on the popular "Leadership Challenge"

Developer Levies 101

- ✓ Development levy theory and best practices
- ✓ Advantages and risks associated with development levies
- ✓ What key inputs are required
- ✓ How to calculate development charges
- ✓ How to write and administer a Development Levy Bylaw
- ✓ Changes to the MGA (allowances for service capital – Fire, Recreation, Police)



CURRICULUM

Project Planning and Management

- ✓ Key concepts related to project planning
- ✓ Developing a project plan (resources, timelines, responsibilities, challenges)
- ✓ Using project planning in your daily work to enhance success
- ✓ How to use project planning to motivate a team
- ✓ Developing a process for prioritizing projects

Financial Policy Development 101

- ✓ Review of best practices related to policy development
- ✓ Fundamentals of writing and concise policies
- ✓ Critical financial policies for municipalities
- ✓ The webinar will cover the requirements for 3 main policies:
 1. Debt Management, 2. Restricted Surplus/Reserves, 3. Year-End Surplus
- ✓ Templates for policy writing will be provided

<https://www.gfoa.ab.ca/events.php#workshops>

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