

**Vermont Government Finance Officers Association**

The Vermont Government Finance Officers Association is pleased to present our 2018 Winter workshop. Please join us as we present three informative sessions offering a total of 5.0 hours of continuing education credit. This winter's workshop is being presented at the Capitol Plaza Hotel and Conference Center in Montpelier, Vermont.

**Best Practices, Policies and Procedures for Municipal Governments**

William Hall from the Vermont League of Cities and Towns and a panel of local government finance officials will present a series of resources aimed at providing you with assistance in helping you craft best practices and procedures for your municipal government.

**Effective Project Management**

Joseph Eriole of OnPont Management Consulting provides organizational management services and consulting to state and local governments and not-for profits. This session will cover the tools of effective project management.

**Records Retention for Vermont Municipalities**

This presentation will explore the complexities of the various requirements in Vermont Statutes for records retention by municipal finance officials.

Please come and share some time with your colleagues.



**2018 WINTER WORKSHOP**

*WEDNESDAY,  
FEBRUARY 21, 2018*

CAPITOL PLAZA  
HOTEL AND  
CONFERENCE  
CENTER,  
MONTPELIER,  
VERMONT

**VERMONT GOVERNMENT FINANCE  
OFFICERS ASSOCIATION**

89 Main Street, Suite 4  
Montpelier, VT 05602  
[www.vtgfoa.org](http://www.vtgfoa.org)

Tel: 802-229-9111  
[www.vtgfoa.org](http://www.vtgfoa.org)

**VTGFOA WINTER WORKSHOP  
FEBRUARY 21, 2018  
AGENDA**

**Come and network with  
your colleagues!**

**VTGFOA WINTER WORKSHOP  
FEBRUARY 21, 2018  
REGISTRATION FORM**

8:30 AM **Registration**

8:55 AM **Welcome** Sarah Macy, VTGFOA  
President

9:00 AM **Best Practices, Policies and  
Procedures for Municipal  
Governments**

Municipal governments have long been encouraged to adopt best practices and financial policies for their governments. This session will explore some of the resources that are available for this process. First, the presentation will explore the various resources available on the Government Finance Officers Association webpage. Then, we will have a panel of local finance officials discuss some of the practices they have adopted.

**William Hall, Chief Financial Consultant, Vermont League of Cites and Towns**

**Panel: Angela Aldieri, Staff Accountant, City of Winooski VT; Lauren Morrissette, Finance Director, Town of Essex VT; Aaron Frank, Asst. Town Manager and Chief Financial Officer, Town of Colchester VT**

10:15 AM **Break**

10:30 AM **Essential Methods for Effective  
Project Management—Valuing  
Persons, Not Personnel**

This session will cover the tools of effective project management through the dual lens of planning and implementation, as well as human relationship management skills. Topics will include establishing project management

protocols, monitoring productivity, maximizing morale, and navigating barriers to change.

**Joseph P. Eriole, Esq., Chief Operating Officer, OnPoint Management Consulting**

12:10 PM **Lunch**

1:10 PM **Vermont Records Retention for  
Municipal Governments**

Vermont Statutes contain many provisions requiring retention of public records by finance officers and clerks. Because times change, it is often unclear what needs to be retained and for how long. With storage space at a premium it is important to take steps to make sure you are retaining the records you are required to retain, but you are not using up space storing records you are not required to retain. The Vermont State Archives and Records Administration will present information that will assist you.

**Megan Wheaton-Book, Records Management Specialist, Vermont State Archives and Records Administration**

2:15 PM **Safe Journey Home!**

These programs are designed to qualify for 5.0 hours of continuing professional education credit under the standards contained in Rule 9.2 of the Office of Professional Regulation of the State of Vermont.

The Capitol Plaza Hotel and Conference Center is located at 100 State Street in Montpelier VT. Take Exit 8 off I-89 and merge onto Memorial Drive. At the second stoplight, take a left onto Bailey Avenue. The Capitol Plaza parking lot is on your right.

Name/Title

Muni/Address

Phone/Email

**Registration Fees:**

- \$50.00 VTGFOA members  
 \$75.00 Non members

**Please check here for a vegetarian meal**

No refund is available if cancellations are made within seven days of the workshop.

**Method of Payment**

- Check Enclosed  Pay at the Door

Amount \$ \_\_\_\_\_

Check # \_\_\_\_\_

**Registration deadline: Wednesday, February 14.**

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