

2016 State Controller's Conference with County Auditors



Daily Agenda

Host County Monterey ~ Hyatt Regency Monterey

Friday, November 4, 2016

Host Updates

8:45am • 9:30am

Property Assessed Clean Energy (PACE): How it Works

James Hamill

Managing Director

California Statewide Communities Development Authority

Donna Segura

Vice President

David Taussig and Associates, Inc.

In 2008, California adopted Assembly Bill 811 to allow local governments to offer Property Assessed Clean Energy (PACE) financing as an option to its residents and businesses. This discussion will cover how PACE financing works from start to finish and the mechanics behind a PACE Assessment.

9:30am • 10:30am

California State Auditor Local High Risk Program

Paul Navarro

Chief of Legislative and Government Affairs

California State Auditor's Office

The California State Auditor has developed a high-risk local government agency audit program for the purpose of identifying, auditing, and issuing reports on any local government agency at high risk for the potential of waste, fraud, abuse, and mismanagement. This presentation will provide an overview on this audit program focused on local government entities.

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15 Minute Break

10:45am • 11:45am Priority Based Budgeting

Andy Heath
Assistant CEO
County of Placer

Assistant CEO Andy Heath will provide an update to the County of Placer's continuing effort to implement Priority Based Budgeting concepts. This presentation will also cover the relationship between the County Executive Office and the County Auditor Controller's Office during this effort.

Lunch

1:00pm • 2:00pm Financial Reporting in the Cloud

Cathlyn A. Coons
Subject Matter Expert
Workiva

Joe Paul Gonzalez
County Clerk/Auditor/Recorder
County of San Benito

In the 2016 NASACT Survey, State Comptrollers have noted numerous concerns, errors, and problem areas in the financial reporting process. This presentation will discuss how government agencies can use Cloud technology to address these issues and implement solutions to improve overall productivity. County of San Benito's Clerk/Auditor/Recorder Joe Paul Gonzalez will discuss recommended budget and CAFR preparation and presentation techniques using Cloud computing.

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2:00pm · 3:00pm Updates by the State Controller's Office

Anita Dagan
Manager, Local Government Policy Section
California State Controller's Office

Gene Hughes
Fiscal Analyst, Local Government Policy Unit
California State Controller's Office

Phillip Pangilinan
Supervisor, County Cost Plans Unit
California State Controller's Office

Renee Hszieh
Manager, Local Government Reporting Section
California State Controller's Office

The State Controller's Office Division of Accounting and Reporting will provide an updates on the status of: the Accounting Standards and Procedures Manual for Counties, County Cost Plan matters, and Local Government Reports.

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Friday, November 4, 2016 (*Continued*)

2:00pm · 3:00pm Updates by the State Controller's Office (cont.)

Elizabeth Gonzalez
Chief, Compliance Audits Bureau
California State Controller's Office

Jim L. Spano, CPA
Chief, Mandated Cost Audits Bureau
California State Controller's Office

The State Controller's Office Division of Audits will provide updates on the status of: Property Tax Audits, Court Revenue Audits, and Mandated Cost Audits.

Closing ~ Conference Adjourned

Thank You for Attending!