

# **2019 A DAY WITH MFOA AND MTE**

## **DRAFT AGENDA**

MUNICIPAL FINANCE OFFICERS' ASSOCIATION OF ONTARIO AND MUNICIPAL TAX EQUITY  
NORTHBURY HOTEL, SUDBURY, ON  
THURSDAY, OCTOBER 17, 2019 AND FRIDAY, OCTOBER 18, 2019

### **THURSDAY, OCTOBER 17, 2019**

<b>5:00 to 7:30 p.m.</b>	<b><u>Beer &amp; Wings</u></b> Over refreshments, wings and snacks, Come and Learn Why You Are Richer Than You Think and Why You should AMP It Up?
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### **FRIDAY, OCTOBER 18, 2019**

<b>7:00 to 8:15 am</b>	<b><u>Breakfast Buffet</u></b> Northbury Hotel Dining Room
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<b>8:15 to 8:30 am</b>	<b><u>Registration</u></b> Coffee and Tea provided
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<b>8:30 to 8:45 am</b>	<b><u>Welcome/Intro &amp; Overview</u></b> <b>Speakers:</b> Donna Herridge, Executive Director, MFOA Heather B. Brown, Manager of Accounting & Corporate Services, MFOA
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<b>8:45 to 9:00 am</b>	<b><u>MFOA What Have We Done For You Lately</u></b> MFOA works to anticipate current and future resource and training needs of municipal finance staff. Learn more about current MFOA initiatives and ideas that we have in the pipeline for you. <b>Speaker:</b> Donna Herridge, Executive Director, MFOA
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<b>9:00 to 9:45 am</b>	<b><u>Informing the Decision-Making Process: Tax and Tax Policy Discussions</u></b> This session will look at how Municipal Finance Staff can bring more to annual tax policy discussions and decision-making processes. We will outline strategies for advancing clear, concise and meaningful information to better inform Council as to how the landscape is changing and the potential impact various decisions might have. In particular we will cover how to distinguish and report on the independent and distinct implications of growth, loss, reassessment/phase-in, policy decisions and budgetary changes. <b>Speaker:</b> Peter Frise, Vice President, Corporate and Client Services, Municipal Tax Equity
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**FRIDAY, OCTOBER 18, 2019**

<b>9:45 – 10:45 am</b>	<p><b><u>What's Next in Asset Management – Levels of Service</u></b> What's your AM GMT? The Next Goal, Milestone and Task in Asset Management. You've met the July 1st, 2019 strategic asset management policy deadline. Now what? This session will review the Province's asset management planning milestones for municipalities, focusing on the next big step - current levels of service for core assets. Participants will participate in a hands-on exercise reviewing their own Levels of Service.</p> <p><b>Speakers:</b> Colin Macdonald, Manager Investment Services, MFOA Heather B. Brown, Manager of Accounting and Corporate Services, MFOA</p>
<b>10:15 – 10:30 am</b>	<p><b>Break (as part of previous session)</b></p>
<b>10:45 – 11:30 am</b> <b>(45 minutes)</b>	<p><b><u>Reserves and Reserve Funds --Managing Risks with Reserves and Reserve Funds</u></b> How Reserves and Reserve Funds can support levels of service and long-term financial planning. This session will explore how to use reserve and reserve funds to deal with your municipality's next big challenge.</p> <p><b>Speaker:</b> Calvin Barrett, AMP It Up Program Manager, MFOA</p>
<b>11:30 to 12:00 pm</b>	<p><b><u>Funding the Future using Investments</u></b> Property tax and provincial transfers are often not enough to deliver the services expected by residents and required by the Province. Learn more about how to leverage what your municipality has to deliver what your municipality needs.</p> <p><b>Speakers:</b> Colin Macdonald, Manager Investment Services, MFOA Calvin Barrett, AMP It Up Program Manger, MFOA</p>
<b>12:00 to 12:45 pm</b> <b>(45 minutes)</b>	<p><b><u>Lunch &amp; Networking</u></b></p>
<b>12:45 to 1:30 pm</b>	<p><b><u>Changing How We Plan: A New Era in Budgeting for Taxes at Risk</u></b> Due to the combined implications of a four-year assessment cycle, extended appeal schedules and historic write-off levels, municipalities must look at new ways to estimate and budget for at risk taxes. This session will highlight a number of critical systemic changes that have made traditional methods of budgeting for potential loss less informative and riskier. We will also look at how to adapt to these changes and prepare more deliberate and robust estimates to better inform and substantiate reserve allocations.</p> <p><b>Speaker:</b> Peter Frise, Vice President, Corporate and Client Services, Municipal Tax Equity</p>
<b>1:30 to 2:30 pm</b>	<p><b><u>Risky Business: OMPF and Your Municipality</u></b> Premier Ford announced at the AMO Conference this summer that there would be no changes to the structure of the Ontario Municipal Partnership Fund for 2020. The question is what does that announcement actually represent for your municipality? Today and into the future? This interactive session will review the past and present of the OMPF, before exploring what changes could mean for your municipality.</p> <p><b>Speaker:</b> Shira Babins, Manager of Policy</p>
<b>2:30 to 2:45 pm</b>	<p><b><u>Wrap Up, Evaluations and Prize Draws</u></b></p>

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