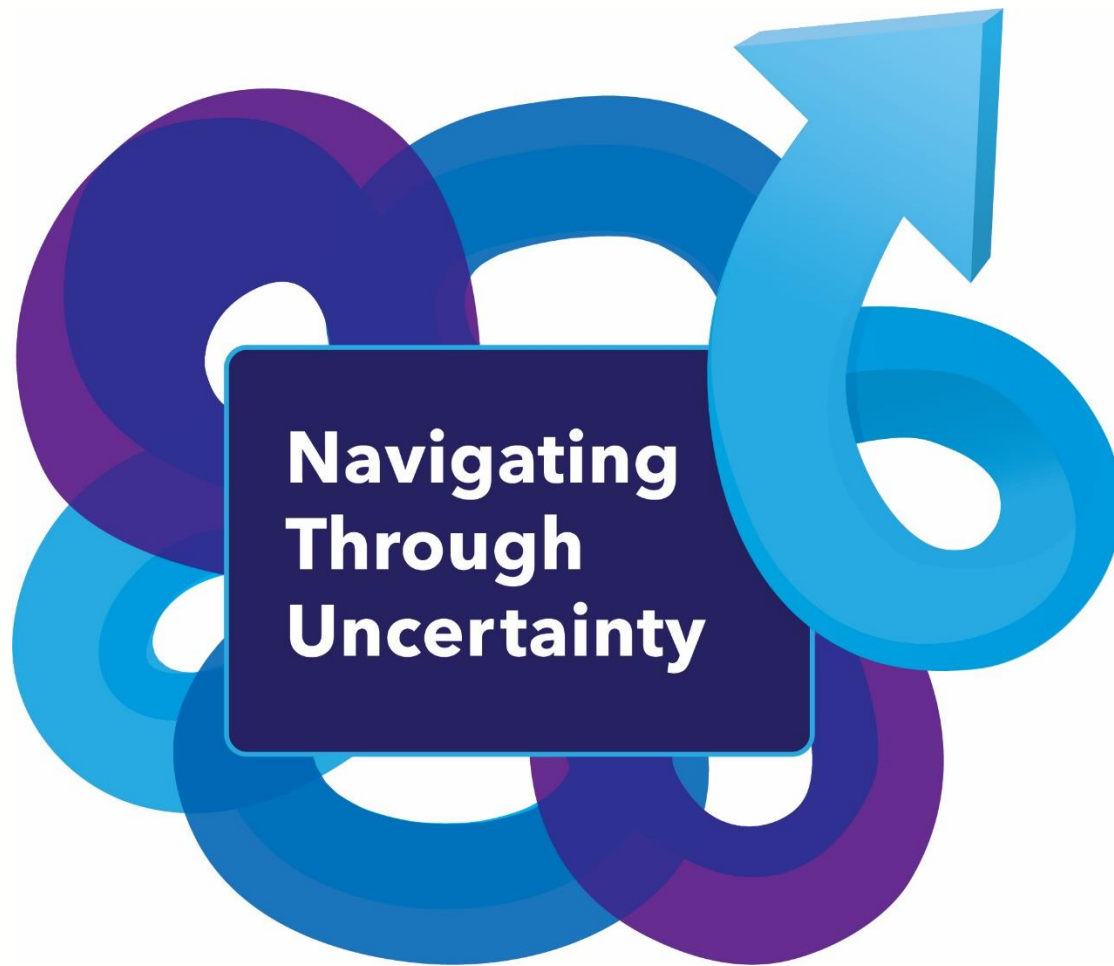


MFOA: What Have We Done for You Lately?

2019 Annual Conference

An Ensemble Cast of MFOA Staff

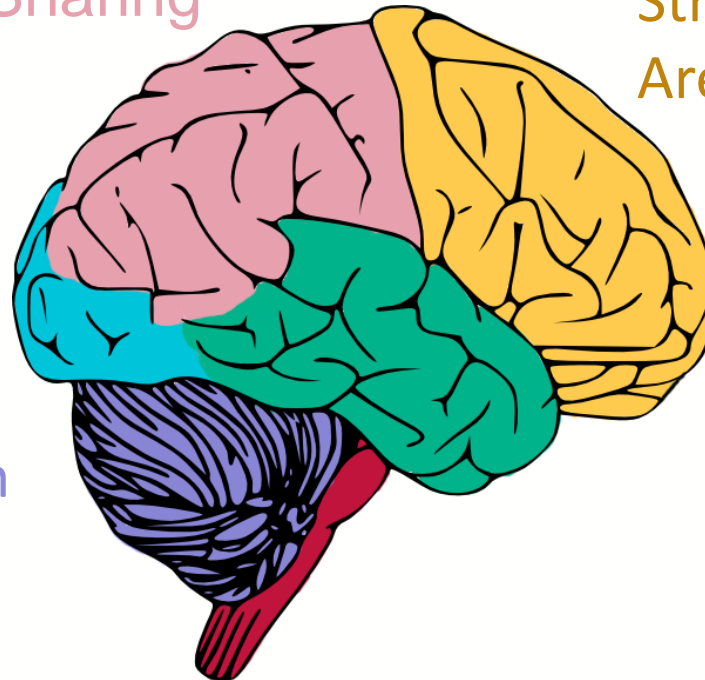




Serving Your Needs... Emerging Themes

Learning Through Sharing

Leveraging **YOUR**
Strengths, Capacity &
Areas of Expertise



MFOA Strategic Plan

Your Management Team



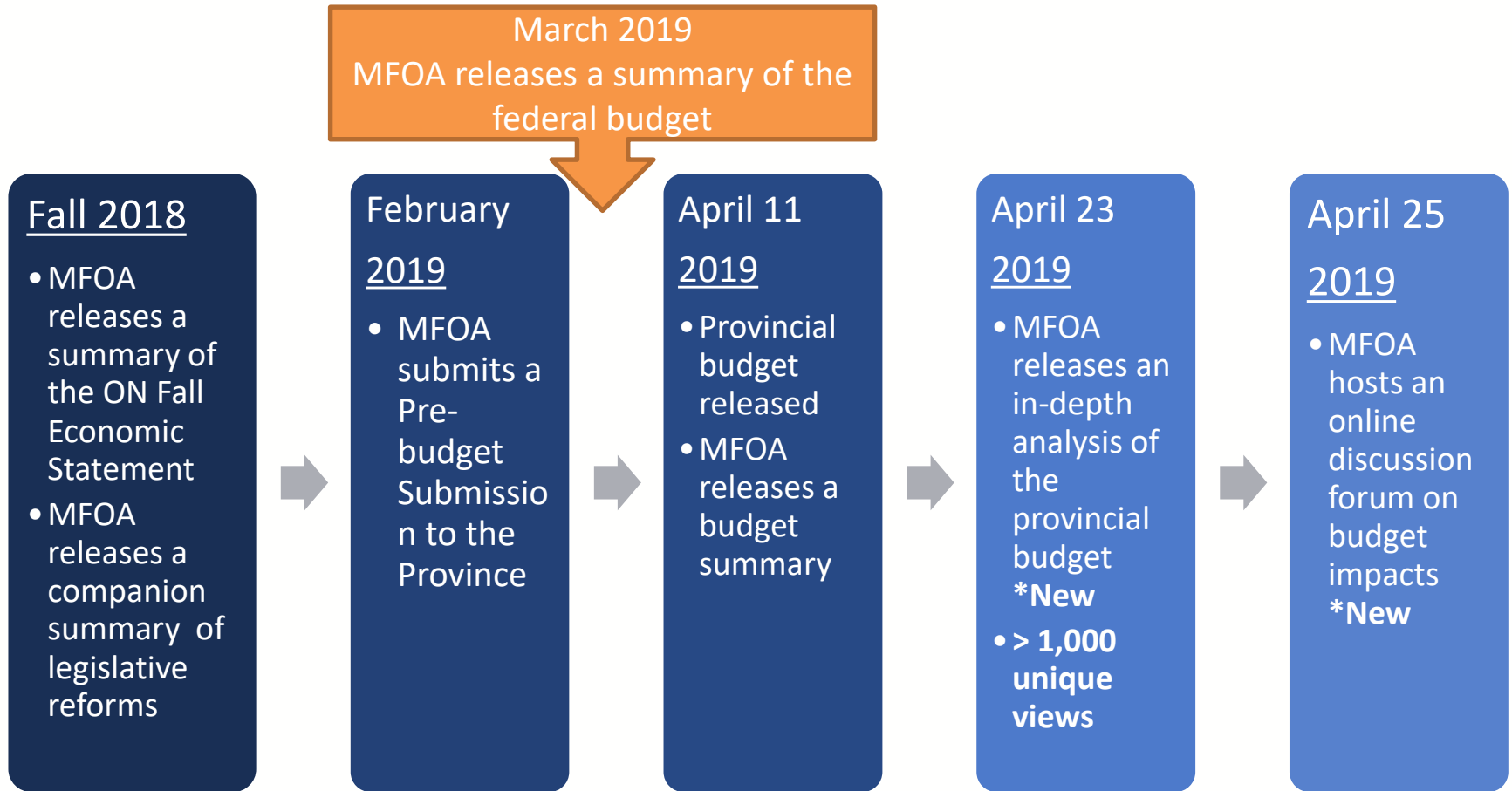
Policy

MFOA Policy

Builds capacity and champions members' perspectives on municipal finance issues through:

- **Sector Support and Engagement**
 - Share information, connect and advise members
- **Intergovernmental Relations**
 - Engage the government and other organizations publicly and behind the scenes
- **Research and Analysis**
 - Contribute to informed discussions

Provincial Budget



Housing Supply Action Plan (Bill 108)

Hosted two online discussion forums

Presented MFOA Position to the Standing Committee on Justice Policy

Created an online hub – close to 2000 unique views and counting

Developed a popular infographic

Coordinating a MFOA working group dealing the most pressing issues

Submissions on:

- Initial consultation
- Bill 108
- Proposed reg changes

Participated in two MMAH technical groups

Published a line-by-line review of *Bill 108 More Homes, More Choice Act, 2019*

MFOA positions received endorsements by Councils and by the Boards of AMO & AMCTO

Wastewater Development Charges



Ministry of Municipal Affairs and Housing
Office of the Minister
777 Bay Street, 17th Floor
Toronto, ON M5G 2E5

December 7, 2018

Dear Minister Clark,

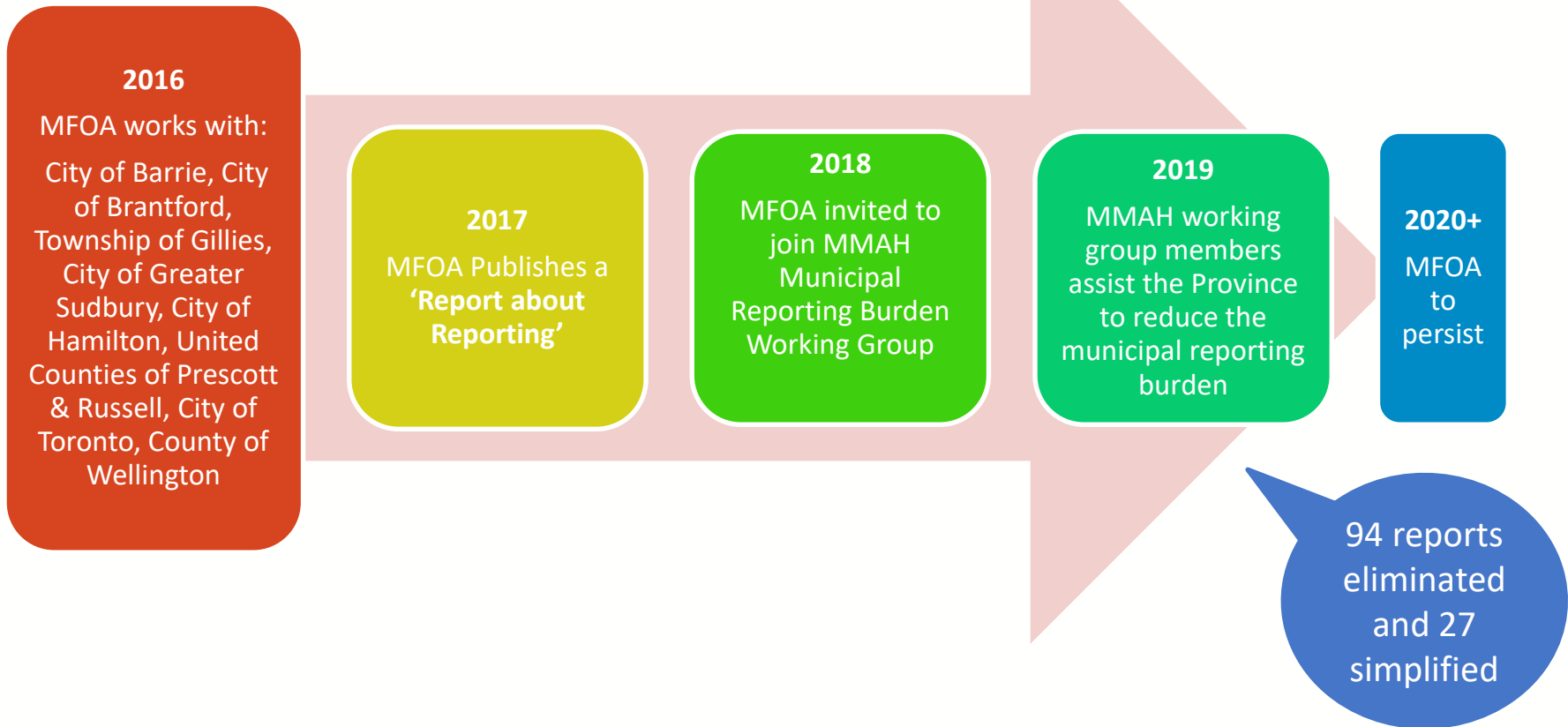
In view of the launch of consultations with respect to the government's Housing Supply Action Plan, we are writing to respond to a recent proposal to eliminate water and wastewater development charges coming from a C.D Howe report titled *Hosing Homebuyers: Why Cities Should Not Pay for Water and Wastewater Infrastructure with Development Charges*.

“We listened when it comes to wastewater capital costs — they will remain 100-per-cent recoverable through development charges.”

Minister Clark, 2019 AMO Conference



Municipal Reporting Burden



Accounting and Financial Reporting

Highlights:

- MFOA's Accounting and Financial Reporting Committee collaborated with AMO to respond to PSAB's consultation on Nontraditional Pension Plans (i.e. OMERS)
- Championed and shared MFOA member's pursuit for clarification on changes to expense deductions for municipal officers



Comprehensive Review

MFOA'S RESPONSE TO OMERS' COMPREHENSIVE PLAN REVIEW

Contents

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- Who We Are 3
- MFOA Policy Positions 3
 - Plan Sustainability 3
 - Affordability 4
 - Administrative simplicity 4
 - Recruitment and Retention 4
 - Principles alignment with OMERS Comprehensive Review principles 4
- MFOA's Position on Proposed Changes 5
 - Pension Formula 5
 - Service Limit 5
 - Normal Retirement Age 60 for paramedics 5
 - Mandatory non-full time 6
 - Early Retirement 8
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MFOA'S RESPONSE TO OMERS' COMPREHENSIVE PLAN REVIEW

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MFOA'S RESPONSE TO OMERS' COMPREHENSIVE PLAN REVIEW: AN EMPLOYER'S PERSPECTIVE



Twitter



MFOA @MFOAOntario · Apr 1
 This is no joke, MFOA's twitter account is back in action! Follow us for current news in #localgov and municipal finance in Ontario. #onpoli

2 3 1



MFOA @MFOAOntario · Aug 18
 Always great to see MFOA members at @AMOPolicy annual conference! Be sure to check our booth in the trade show #AMOConf19



MFOA @MFOAOntario · May 31
 Our submission on Bill 108, More Homes, More Choice Act is now available online. We believe there are development charges and concerns mfoa.on.ca/mfoa

MFOA Retweeted
Rob Ferguson @robferguson1 · Jun 20
 BREAKING: full story on Ford cabinet shuffle. Big make-up.



Ford scrambles to reboot Tory government with massive shuffle | The Star
 Premier Doug Ford replaces Vic Fedeli at Finance with Rod Phillips and demotes other underperforming ministers in a massive cabinet shuffle
 thestar.com

1 9 6



en VanOfwegen

9

The municipal sector needs:

- a) Legislation that permits... through the DCA or... that the tools allow for
- b) Tools to recover growth... municipal residents... hard and soft services... (residents, business)
- c) Streamlined administration... and money. It also includes
- d) Enabling legislation... prescriptive legislation... undesirable and unworkable

5

Policy Committee & Working Groups

Standing Committees:

- Accounting and Financial Reporting
- Policy and Research

Working Group:

- Community Benefits Charge (CBC)

Partnerships



MUNICIPAL
PROPERTY
ASSESSMENT
CORPORATION



Ontario Municipal Tax
and Revenue Association
Ontario's Municipal Revenue Specialists



What to Expect in 2020

- Continuing to support members and champion their views with the Province of Ontario
- Resources to help implement PSAB changes on:
 - Asset Retirement Obligations
 - Financial instruments (**This includes Accounts Receivable, not just Investments**)

Education and Training

Education and Training

- Builds capacity and provides continuous professional development



- Topics are prioritized based on your input

Benefits

Now Available! e-Learning: learn at your own pace from your computer at a time and location that is convenient for you!

- First up...*Municipal Finance 101 – A Fundamentals Course.*

Staff

- Learn at your own pace
- Personalized learning plan
- Flexible around your schedule
- Save on travel time



Municipality

- Onboard training readily available for new/existing staff
- Time savings
- Eliminate travel and accommodation costs

2018 Highlights

> 125

Municipal staff registered
for MF101 e-Learning

97% 

Reported high level of
satisfaction with MF101

Annual Conference Exclusive Promo Offer!



+



eLearning MF101

When 3 or more staff register from same municipality (members only)

Expires **Monday, September 30, 2019**

Register on our [website](#)

Contact Eunice Leung (Eunice@mfoa.on.ca) for any questions

Upcoming Training

Reserve and Reserve Funds workshops 101 & 201

101 Workshops:

Thursday, Oct 17 - Kingston

Tuesday, Oct 22 - Brampton & Livestream

Thursday, Oct 24 - London

201 Workshops:

Tuesday, Nov 5 - Kingston

Thursday, Nov 7 - Brampton & Livestream

Tuesday, Nov 12 - London

Upcoming Training

Investment Basics 101 workshops

Thursday, October 3 – London

Friday, October 11 - Orillia

Friday, November 1 - Peterborough

Friday, November 8 - Brockville

Accounting and Corporate Services

MFOA Municipal Members



Membership...Just the Facts

- Municipalities are member
 - **ALL** your municipal staff ARE MEMBERS!!!!
- Many classes of memberships
- Retirement membership are available

Asset Management



Asset Management Resources

In partnership with Asset Management Ontario, the Asset Management Resources webpage is a central source for important documents, videos, and policies related to asset management. Based on the 12 sections of MFOA's asset management Self-Assessment Tool (SAT), the resources on this page have been carefully selected to suit your municipality's asset management needs.

How to Use

To the right of your screen are all the documents available on our Resource page. Each resource includes a date of publication, author information, and a brief description. Click on the title to access the document.

To filter the resources, select items on the left by checking off characteristics of the resource you are looking for. The results of your search will appear on the right.

Subject Area

MFOA Self-Assessment Tool

Chapters

Introduction

Starting the asset management conversation with your municipal council

(2018-10-01)

This resource is a communication tool (presentation) that is ready to use as-is. It includes slides and speaking notes that can be personalized to you community's needs and a particular
[Show more](#)

MFOA Article in
June 2019 edition
of Municipal World

Strategic asset management policies

Champions, advisors, doers, and dreamers all required to keep your assets in a state of good repair



Asset Management – Tools and Supports

ontario.ca/page/municipal-asset-management-planning#section-3



Municipal asset management

Get information, tools and support to develop

On this page

1. [Asset management planning](#)
2. [Key components of the municipal asset management planning regulation](#)
3. [Tips and best practices](#)

ontario.ca/page/municipal-asset-management-planning#section-3

Tools and supports

Developing asset management plans may be challenging for some municipalities, especially the smallest ones. We have tools and supports in place to help municipalities.

Community of Practice Activities

Communities of practice provide valuable opportunities to share best practices in the field of asset management. Asset Management Ontario has developed a successful community of practice network throughout Ontario. With our support, it is expanding its successful peer network to reach more municipalities and help them meet the requirements of the new regulation within the prescribed timelines. Community of practice initiatives include small group hands-on seminars, online forums, peer reviews, asset management planning readiness assessments, benchmarking, and other training opportunities.

[Learn more about these initiatives.](#)

Communities of Practice Guide

With our support, the Municipal Finance Officers' Association (MFOA) prepared a guide to provide practical recommendations intended to assist municipal staff in developing and maintaining their own communities of practice to best meet their needs.

[Read more about the Asset Management Communities of Practice Guide.](#)

Strategic Asset Management Policy Toolkit

The strategic asset management policy toolkit is available to all municipalities. It provides valuable guidance to help municipalities meet the requirements and recommendations set out in the regulation. It also provides additional context and highlights the main elements of each component to be included in a municipality's policy.

[Read more about the Strategic Asset Management Policy Toolkit.](#)

Asset Management Self-Assessment Tool

The online Asset Management Self-Assessment Tool and Maturity Framework supports municipalities in their evaluation of their asset management planning readiness. It also allows municipalities to explore potential approaches for moving to higher levels of maturity.

[Read more about and access the Asset Management Self-Assessment Tool and Maturity Framework.](#)

Asset Management Plan Assessments

In 2016, MFOA introduced a pilot project known as AMP It Up. The goal of this initiative was to improve the asset management plans and practices of small municipalities by sending expert teams into the field. We are collaborating with MFOA to expand the initiative to reach even more municipalities in a second phase known as AMP It Up 2.0.

[Click here to visit the webpage](#)

AMP It Up 2.0

Funded by MOI & MFOA

- In-person expert Asset Management Plan assessment and localized action plan developed for each municipality (Municipal Action Plan)
- All municipalities under 25,000 population are eligible.
- 93 municipalities participated in AMP 1.0

Rollout

- **Group 1**
58 municipalities launched January 2019
- **Group 2**
65 municipalities launched June 2019
- **Group 3**
25+ municipalities set to launch end of September 2019
- **Group 4**
100 municipalities still qualify – need to sign up, launch and commence work with consultants by December 31, 2019

Direct AM Resources in Your Municipality

- Population under 25,000
- Not already in AMP It Up
- Contact:

Calvin Barrett

Calvin@mfoa.on.ca

Rose Carino

Rose@mfoa.on.ca

Thinking About Retiring...



MFOA NEEDS YOU!!



Temporary Finance Professionals

A program to **link qualified municipal finance professionals** with municipalities looking to fill financial positions on a part-time or temporary basis.

- Employee and employer portal launched in 2018. **Sign up today!**
- If you are retiring in 2020 and considering consultant work, we want to hear from you.

Investment Services

ONE Investment



Purpose:

- “**facilitate investment** by municipalities and public sector bodies in investment products and vehicles
- to make available, **and lower the cost of**, such products and services **in a manner consistent with the investment objectives of such municipalities** and public sector bodies.”

NEW in 2018/19

- Incorporated **ONE Investment** as a not-for-profit organization
- Obtained an Ontario Securities Commission exemption to be able to provide investment advice to clients
- Hired a CFA Charterholder (Keith Taylor) to provide investment advice and expertise to municipalities
- MFOA introduced a full-time resource to provide dedicated Municipal Finance expertise

New Service Delivery Model



What to Expect in 2019/2020

Prudent Investor - **NEW**

- A Prudent Investor turnkey solution in full compliance with the recently introduced legislation
- Two **NEW** funds to expand into investments not permitted under the legal list

Legal List

- Redesigned custom quarterly investment reports
- Ongoing efforts to seek the best rates for our pooled accounts