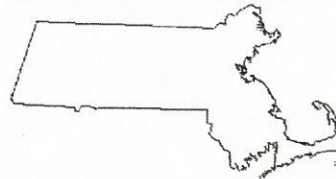


**Association of Town Finance Committees  
One Winthrop Square  
Boston, MA 02110**

Phone: (800)-882-1498 (617)-426-7272

Fax: (617)-695-1314



September, 2014

Dear Finance Committee Chair:

I want to invite you and your committee to the Association of Town Finance Committees' 2013 Annual Meeting. It will be held on Saturday, October 18, at Tri County Regional High School in Franklin from 9 a.m.-3 p.m.

The educational sessions offered this year include some new topics as well as old favorites. The ATFC has worked hard to balance the workshops to offer something for the newcomer as well as the long-serving finance committee member.

The Annual Meeting is YOUR meeting. It's a great opportunity to network with your peers and to learn how other communities are dealing with the same issues. I encourage you to attend and take advantage of this great learning opportunity.

The 2014 edition of the Finance Committee Handbook will be available for the first time at the meeting. Be sure your dues are current so you can pick up copies for you and your committee.

We're inviting new members (first year on the committee) to register for \$45, a five-dollar reduction from the regular member price that is \$50. Non-members will continue to pay \$60. We hope that all new members will take advantage of this learning opportunity.

Enclosed you will find the agenda, registration form and directions. You can also access this information at [www.mma.org](http://www.mma.org). Please share this information with your committee and encourage your colleagues to attend. Any other interested local officials, like selectmen, are also invited to register.

Please feel free to contact Senior Member Services Coordinator Denise Baker at the MMA at 800-882-1498 if you have any questions. I look forward to seeing you in October.

Sincerely,

A handwritten signature in black ink that reads "Jennifer Gonzalez". The signature is fluid and cursive, with the first name and last name clearly legible.

Jennifer Gonzalez  
ATFC President and Holbrook Finance Committee



**Association of Town Finance Committees  
Annual Meeting, October 18, 2014  
Tri County Regional Vocational Technical High School, Franklin  
Agenda**

**8:15-9:30 a.m.**

**Registration, Breakfast, Networking**

*School Foyer, Cafeteria*

Come meet our board members. We'll group tables by region and ATFC board members will be prepared with some discussion starters. During this time, we encourage members to sit with their colleagues from their region to discuss issues they have in common.

**9:30-9:40 a.m.**

**President's Welcome, Jennifer Gonzalez, Holbrook  
Business Meeting**

*Auditorium*

**9:40-10:15 a.m.**

**What's Next in Local Government: A Look to the Next Generation**

**Kate Fitzpatrick**, Needham Town Manager and immediate MMA Past President

**10:15-10:30 a.m.**

**Break**

**10:30-noon**

**Concurrent Workshops**

**1. Budgeting 101**

Ever question what financial information you should be asking for or the format it should come in? This session will review national best practices in public budgeting as promoted by the Government Finance Officers Association through its Distinguished Budget Award program. Whether new to the Finance Committee or a veteran member, this session will provide you with a clear roadmap for building consensus by showing how best to organize and present your community's financial information.

**John Coderre**, Town Administrator, Northborough

**Moderator: Eric Beckerman**, Finance Committee Chair, Avon and ATFC Director

**2. Legal Issues for Finance Committees**

**Matthew G. Feher**, Attorney, Burns & Levinson LLP

**Nicholas Anastasopoulos**, Partner, Mirick O'Connell (tentative)

This interactive session will be an overview of the common legal issues that finance committee members need to know. This includes Open Meeting Law, Conflict of Interest, and the basics of collective bargaining. Bring your questions!

**Moderator: Charles "Buzzy" Baron**, Finance Committee Chair, Westport

**3. True Cost of Development**

As communities throughout the Commonwealth consider mixed-use developments an assessment of the fiscal impact is inherent in the consideration of the scale of any such project. Having a transparent framework for the analysis will set the stage wherein *projections and reality* are more closely aligned.

**Liz Allison**, Planning Board Member, Belmont

**Moderator: Raffi Manjikian**, Belmont Warrant Committee and ATFC Director



#### **4. Financial Policies**

This session will give finance committee members an overview of the value of developing and adhering to financial policies that suit the unique needs and constraints of your municipality. It will provide both a local perspective and the success achieved from establishing and following prudent financial policies, as well as a discussion with a rating analyst on how financial policies factor into the rating and how management practices are assessed and evaluated in determining creditworthiness and fiscal flexibility.

**Victor Medeiros**, Associate Director, Standard & Poors

**Jeff Nutting**, Town Administrator, Franklin

**Moderator: Cinder McNerney**, Managing Director, First Southwest Company, Swampscott Finance Committee and ATFC Director

**Noon**

**Luncheon**  
**12:30 – 1:15**

*Cafeteria*

**Speaker:**

**John Robertson**, Legislative Director, Massachusetts Municipal Association

**1:30-3:00 p.m.**

**Concurrent Workshops**

#### **1. Health Insurance and OPEB**

Other Post Employment Benefits (OPEBs), mainly consisting of retiree health insurance, represent a \$30 billion liability for the cities and towns of the Commonwealth. These benefits will soon crowd out funding for essential municipal jobs and services. This workshop will focus on the importance of managing your OPEB liability for the fiscal health of your community, as well as state and local legislative changes on the horizon.

**Dan Morgado**, Town Manager, Shrewsbury

**Katie McCue**, Senior Legislative Analyst, MMA

**Moderator: Joanne Marden**, Andover Finance Committee and ATFC Past President

#### **2. Saving Money by Sharing Services**

Municipal officials from both the eastern and western areas of the state will share their experiences in sharing the delivery of services with other cities and towns. Most of these are accomplished with inter-municipal agreements and do not involve the creation of costly districts.

**George Pazos**, Information Technology Director, City of Melrose

**Bob Dean**, Director of Regional Services at the Franklin Council of Governments and former selectmen and town administrator in Buckland

**Moderator: Al Tosti**, Arlington Finance Committee Chair and ATFC Treasurer

#### **3. School Building**

This session will give finance committee members an overview of financing construction or renovation of public school buildings for local and regional school districts. It will touch upon the grant programs through the Massachusetts School Building Authority and borrowing options for the local share of costs including the use of short term notes, bonds, or a combination of both, including special considerations for debt exclusions.

**Jennifer Gonzalez**, Director of Finance, Massachusetts School Building Authority and ATFC President

**Cinder McNerney**, Managing Director, First Southwest Company, Swampscott Finance Committee and ATFC Director

**Moderator: Chris Kelley**, East Bridgewater Finance Committee Chair, ATFC Director

**Tri-County High School  
147 Pond Street, Franklin**

If you are traveling north on route 495 take exit 17 and stay to the right as you come to the top of the ramp. Turn right onto route 140 and move into the left hand lane as you approach the traffic signal.

If you are traveling south on route 495 take exit 17 and stay to the left as you come to the top of the ramp. At the traffic signal take a left, crossing over route 495. Proceed straight through the next traffic signal after you cross over the highway. Move into the left hand lane as you approach the next traffic signal.

At the traffic signal (with the shopping plaza on your left) turn left. The access road to Tri-County (Tri-County School Dr.) will be your first right, which will be almost immediately after the traffic signal. Proceed up the hill on the access road and take your first and second rights. Take your first left to park in the parking area. Approaching the building from the parking lot, enter the glass-enclosed area and registration will be to your left.

**ATFC Annual Meeting Registration**  
**Saturday, October 18, 2014**  
**Tri County Regional Vocational High School**

**Registration:**

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Name: \_\_\_\_\_ Title : \_\_\_\_\_

Municipality: \_\_\_\_\_

Contact email: \_\_\_\_\_

**Payment Method:**

☐ Payment enclosed ☐ Bill my credit card

Cardholder's Name \_\_\_\_\_

Cardholder's Billing Address \_\_\_\_\_

Town \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Visa ☐ MC ☐ Discover ☐ AMEX ☐

Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_

3-digit code ☐ ☐ ☐ (see reverse of card)

Cardholder's Signature \_\_\_\_\_

**ATFC Policy: Payment must be made in advance or on the day of the meeting.**

- ☐ **\$45** for first time and new (less than one year on the committee) attendees for all finance committee members of ATFC dues paying communities
- ☐ **\$50** for all finance committee members of ATFC dues paying communities
- ☐ **\$60** per attendee for all other local officials and finance committee members from non-dues paying communities

**This cost includes all meeting materials, continental breakfast and a hot luncheon buffet.**

If you are unsure of your membership status, please call MMA Senior Member Services Coordinator Denise Baker at 800-882-1498 ext.105.

**Cancellation Policy:**

If you register but are unable to attend, please notify us by October 14. Otherwise, you will be billed for the meeting.

**Please return this form by October 8 to:**

ATFC Annual Meeting  
One Winthrop Square, 2<sup>nd</sup> Floor  
Boston, MA 02110  
Fax: 617-695-1314