

**20** **MAY TRAINING**  
**21** **MAY 12 & 13 | VIRTUAL**



# SPEAKERS

**May 12**

## **Arizona Pension Bonds Update**



**Siri Mullaney,**  
*Chief Financial Officer, Coconino County*

Siri Mullaney has over 18-years of Arizona governmental accounting and finance experience. Siri started her career working for Coconino County, and has served as the Budget Director for Northern Arizona University and the Dean of Finance for Coconino Community College prior to returning to Coconino County as the CFO in 2020. She is a Certified Public Accountant licensed in Arizona. Ms. Mullaney graduated from Grand Canyon University in 2015 with a Master's in Business Administration, and from Northern Arizona University with a Bachelor of Science in Accountancy in 2001.



**Rushda Mustafa,**  
*Nicolaus & Company, Incorporated*

Rushda Mustafa, Vice President, joined Stifel's Public Finance Department in 2012 and provides quantitative expertise, general transaction support and analysis for the Chicago Public Finance Office. She provides coverage of state and local government credits and has senior management level experience with sophisticated state and local government issuers of all sizes including numerous cities and counties within the State of Arizona such as Flagstaff, Tucson, and Coconino among others as well as the States of Michigan, Illinois, Indiana, and Wisconsin among others. Ms. Mustafa graduated from the University of Chicago with an M.A. in Humanities in 2012 and from the University of Waterloo with a Bachelor of Mathematics (Honors Actuarial Science and Finance) in 2009. She is a Registered Municipal Securities Representative (Series 52) of FINRA.



**Mark Reader,**  
*Nicolaus & Company, Incorporated*

Mr. Reader is a Managing Director with over 32-years of Arizona public finance experience, starting in 1989. His primary focus is Arizona Cities/Towns/CFDs and Counties where he has developed a passion and expertise within this specialized area of Public Finance, consistently managing approximately 40 Arizona financings per year. During this time, he has structured and managed a wide variety of traditional tax-exempt bond transactions including general obligation bonds, excise tax revenue bonds, water and sewer utility revenue bonds, special assessment bonds, WIFA Loan transactions, HURF bonds, CFDs and Certificates of Participation.

In the past 12 months, Mr. Reader has been one of the lead bankers in Arizona in the innovative development of the PSPRS Refunding bond transactions, working closely with his Stifel colleagues out of our Chicago office. Of the 12 transactions completed to date in Arizona, Stifel has been involved in all of them as Senior Managing Underwriter (10 – 12) or as Co-Manager (2 out of 12).

Mr. Reader's Financial Advisor or Underwriter clients include the City of Avondale, City of Buckeye, City of Peoria (previous CFD engagements, City of Goodyear (CFDS), City of Flagstaff, Town of Florence, City of Yuma, Town of Marana, Town of Oro Valley, Regional Transportation Authority of Pima and Pinal County, Metropolitan Domestic Water Improvement District and Lake Havasu City and Pinal County, to name a few.

Mr. Reader graduated from the University of Arizona with a bachelor of science in Finance and Accounting. He holds his Series 7, Series 50 and Series 63 licenses. Mr. Reader is a University of Arizona Eller Associate where he has participated in interviewing and assisting undergraduate business students. He is also a member of GFOA, GFOAz and ACMA (and volunteer for the Harvard Scholarship Program). Mr. Reader is a passionate advocate for Arizona Cities and Towns and is actively involved in legislative issues as requested by his clients and other organizations such as the League and County Supervisors Association.



**Philip Rodriguez,**  
*City Manager, City of Yuma*

Philip Rodriguez has over 20 years of professional experience, with the past 13 encompassing nearly every level of government administration. Although he enjoyed success serving as a consultant to non-governmental organizations and not-for-profits in the first phase of his career, he found his true passion to be in local government service. Philip currently serves as the City Administrator in Yuma, Arizona, a diverse community of 108,000 permanent residents that swells to over 200,000 during the winter months due to Yuma's unparalleled winter weather. In Yuma, Philip helped create and now oversees the city's first strategic plan, a fiscal year budget of \$250 million, and is honored to lead a dynamic staff of over 1,100. He was appointed in 2019 by the City Council who operate under the City's Charter and the Council-Manager form of government. After earning his Master of Public Administration degree from the top-ranked program at The University of Kansas and his Bachelor of Science in Organizational Management from Colorado Christian University, Philip went on to serve several cities in Texas and one in northern Colorado. Philip is married to his high school sweetheart and he and his wife are proud parents to two daughters and future leaders; a law student and a high school junior.

# May 12

## American Rescue Plan and Implementation Resources



**Michael Belarmino,**  
*Senior Policy Advisor, GFOA*

As Senior Policy Advisor of GFOA's Federal Liaison Center, Michael leads coalition and grassroots advocacy efforts in the areas of public pensions, internet sales tax, federal preemption legislation and healthcare reform. Additionally, Michael supports the FLC's Director on legislative and regulatory advocacy related to tax reform, infrastructure investment and federal appropriations and budget legislation. Michael also serves as staff on GFOA's CORBA Committee. Prior to joining GFOA, Michael was an Associate Legislative Director for Finance, Pensions and Intergovernmental Affairs at the National Association of Counties (NACo). At NACo, he was responsible for all policy development and lobbying for the association in the areas of municipal finance and tax, elections, pensions and county and tribal government relationships. He also served as Associate General Counsel for NACo.

Michael has a BBA in Computer Information Systems from Georgia State University and a JD/MBA from Western New England University. He is a Member of the Pennsylvania State Bar.



**Michael Thomas,**  
*Federal Policy Associate, GFOA*

Michael provides general support to the Federal Liaison Center on legislative initiatives specifically on issues involving infrastructure and transportation. Having formerly worked in the private sector as a financial consultant and stock broker, Michael brings a working knowledge on fiscal issues that spans a wide spectrum of topics.

Michael holds a B.S. in Economics from the University of Tennessee and an M.P.P. from George Mason University.

# May 13

## Leveraging Emotional Intelligence for Team Success



**Michele Dotson,**  
*Senior Manager, BerryDunn*

Michele Dotson is a senior manager at BerryDunn, a management and IT consulting and CPA firm. She specializes in project management and change management services for local government organizations undergoing large-scale business transformation projects, and is passionate about helping public servants obtain better tools to serve and strengthen the trust of the public. Prior to her consulting work, she spent five years in the public sector in management and budget analyst roles. She has her Master of Public Administration from the University of Kansas, and holds her Project Management Professional (PMP) certification from the Project Management Institute. She is also a Prosci® Certified Change Practitioner, and a Certified Change Management Professional with the Association of Change Management Professionals (ACMP), a certification obtained by less than 1,000 individuals globally.



**Sondra Hathaway,**  
*Senior Consultant, BerryDunn*

Sondra Hathaway is a senior consultant at BerryDunn, a management and IT consulting and CPA firm. Sondra, an former Arizonan, helps build internal capacity to support strategic needs and direction of organizations, including the Cities of Phoenix and Goodyear, and the Maricopa Superior Court and Arizona Supreme Court. Before BerryDunn she served in the public sector for over twenty years focusing on the areas of organizational development and strategic human resources. A seasoned presenter with an MBA and undergraduate degrees in Psychology and Sociology, Sondra leverages her experience and education to help team members embrace change!

# **GASB 87: Understanding and Implementing the New Lease Accounting Standards**



**Dennis J. Osuch, CPA,**  
*CliftonLarsonAllen LLP*

Dennis is a principal in CLA's state and local government industry team with more than 24 years of experience. He also serves as the Phoenix industry leader for state and local governments. Although Dennis manages the state and local government industry locally, his role is largely focused on serving our clients with the experience and knowledge you would expect from a national firm. Dennis has served on CLA's government steering committee and thought leadership team and is a past board member of the Desert School Federal Credit Union.



**Walker D. Wilkerson, CPA,**  
*CliftonLarsonAllen LLP*

Walker is a principal with CLA and has 30 years of public auditing experience with a focus on governmental entities and nonprofit organizations. He has served as a member of the AICPA's State and Local Government Expert Panel and as a reviewer for the GFOA Certificate of Excellence in Financial Reporting program. Additionally, Walker has served as an adjunct professor at Florida Southern College teaching a variety of accounting courses.