

William C. Statler

Fiscal Policy ■ Financial Planning ■ Analysis ■ Training ■ Organizational Review

TRAINER EXPERIENCE

I have provided highly-rated financial management training for many years, both when I was the Director of Finance & Information Technology for the City of San Luis Obispo as well as in the “third act” of my career as a consultant, author and trainer.

Agencies

As outlined below, I have provided training for a broad range of agencies, including:

- League of California Cities
- Institute for Local Government
- California Debt and Investment Advisory Commission
- Government Finance Officers Association of the United States and Canada (GFOA)
- California Society of Municipal Finance Officers (CSMFO)
- Municipal Management Assistants of Southern California and Northern California
- Probation Business Managers Association of California
- National Federation of Municipal Analysts
- Humboldt County
- California Association of Local Agency Formation Commissions

Topics

The following provides an overview of the financial, management and leadership topics I have presented, followed by a short program description for each.

- Financial Analysis and Reporting
- Fiscal Health Contingency Planning
- Effective Project Management
- Providing Great Customer Service in Internal Service Organizations: The Strategic Edge
- Strategies for Strengthening Organizational Effectiveness
- The Power of Effective Meetings in Achieving Your Organization’s Goals: Smart Uses of Electronic Scheduling
- Top-Ten Skills for Finance Officers
- Telling Your Fiscal Story: Tips on Making Effective Presentations
- Effectively Using Visual Aids in Making Great Presentations
- What Happened in the City of Bell and What We Can All Learn from It
- Transparency in Financial Management: Meaningful Community Engagement in the Budget Process

Trainer Experience

- Preparing for Successful Revenue Ballot Measures
- 12-Step Program for Recovery from Fiscal Distress
- Strategies for Downsizing Finance Departments in Tough Fiscal Times
- Integrating Goal-Setting and the Budget Process
- The Power of Fiscal Policies
- Debt Management: Taking a Policy-Based Approach to Protecting Long-Term Fiscal Health
- Multi-Year Budgeting
- Financial Management for Non-Financial Managers (“Municipal Finance 101”)
- Financial Management for Elected Officials (“Municipal Finance 101”)
- Long-Term Financial Planning

Program Descriptions

Financial Analysis and Reporting

This program provides practical advice, with helpful examples, on how to improve your analysis of financial information and effectively present the results, in both annual reporting (such as comprehensive annual financial reports) as well as interim financial reporting. Depending on the time available, this could also include an overview of generally accepted accounting principles, which form the basis of annual reporting.

Fiscal Health Contingency Planning

Drawing on the experience of the City of San Luis Obispo, this program presents the value of preparing plans for responding to adverse fiscal circumstances before they hit. While the City was certainly not immune to financial downturns, having a strategy in place allowed it to navigate through very tough fiscal times in a way that just would not have been possible without it: the City was able to maintain its long-term fiscal health while preserving its organizational vitality.

Effective Project Management

While it may seem like project management is the domain of the engineering staff, the fact is that finance officers are responsible for developing and executing projects all the time, including new financial management systems, audits and annual report preparation and the budget process. It may be cliché, but it’s true: failing to plan is planning to fail. When projects go badly, it is due one of two causes (or a “perfect storm” combination of both): poor planning or poor implementation of the plan. This session will provide practical tips on how to better manage projects through more effective planning and follow-up execution of the plan.

Providing Great Customer Service in Internal Service Organizations: The Strategic Edge

We often think that customer service happens by the “operating departments,” and that internal service organizations like finance, human resources and information technology only touch on the periphery of this mission at best. However, the fact is that internal service organizations should be the vanguard of any organization-wide customer service improvement efforts. Stated simply, no one in the organization is going to take “external” customer service efforts seriously if they receive poor customer service internally. This session provides tips on how internal service organizations can lead the way in delighting their customers with the services they provide while also meeting internal control and fiscal health responsibilities.

Strategies for Strengthening Organizational Effectiveness

Given the resource constraints facing us in the “new normal,” being effective and efficient in the delivery of service is more important than ever. An added pressure in doing so is the retirement

of baby-boomers and related need for succession planning. This session will present practical tips that you can begin using right away in strengthening your organization's effectiveness.

The Power of Effective Meetings in Achieving Your Organization's Goals: Smart Uses of Electronic Scheduling

Organizations exist to bring groups together to achieve goals that cannot be accomplished by individuals working alone. Groups working together looks a lot like ... meetings. Yet, we all tell stories around the campfire about how we hate them! The fact is that meetings – employees working together – are essential for organizational effectiveness. This session will focus on how to make meetings more effective and rewarding for the participants, with a special focus on how e-calendaring applications like Outlook can be effective productivity tools (instead of the time-wasters they can often seem to be).

Top-Ten Skills for Finance Officers

Of course, councils and city managers are looking for technical competency in their finance officers. But they are also looking for finance officers who can bring strong leadership and other key “soft skills” to the table. This session presents the “top ten skills” that finance officers need in meeting the needs of their communities.

Telling Your Fiscal Story: Tips on Making Effective Presentations

An important part of an effective finance officer's job is communicating complex numbers to elected officials, senior managers, the organization and the community. The secret to success is simple: don't try to communicate complex numbers; instead, communicate what they mean. This program will present “8 Tips” in making more effective presentations, both orally and in writing.

Effectively Using Visual Aids in Making Great Presentations

Visual aids can make almost any presentation more compelling – if it's the right visual aid, used in the right way. A picture is worth a thousand words – if it's the right picture. Effective use of visual aids is more than just PowerPoint. This session presents key tips on the right kinds of visual aids to use given the circumstances, and how use them most effectively in telling your story.

What Happened in the City of Bell and What We Can All Learn from It

Bill Statler received the Cal-ICMA Award for Ethics for his service to the City of Bell in the aftermath of well-publicized scandals. This session will provide an overview of what happened in Bell, its journey of recovery and “lessons learned” for all us from Bill's experiences there.

Transparency in Financial Management: Meaningful Community Engagement in the Budget Process

A smart city manager once observed: “With trust, anything is possible; without it, nothing is.” An important component in building trust – and being accountable for the public resources that have been entrusted to us – is being transparent in our stewardship of agency finances and meaningfully engaging the community in the fiscal decisions that affect them, like the budget process. Effective public involvement encourages residents and businesses to better understand the hard choices that budgeting entails, as well as provides policy-makers with a better understanding of the services that the community values. Moreover, increased public understanding about local agency finances and challenges, can lead to greater support for budgetary decisions as well as for measures to increase effective use of local revenues. This session will provide tips based on the successes of a wide range of communities in improving transparency and effectively engaging their communities in the budget process.

Debt Management: Taking a Policy-Based Approach to Protecting Long-Term Fiscal Health

As we've learned from the recent bankruptcies in California, appropriate use of debt in funding important services is a critical factor in ensuring your agency's fiscal solvency and protecting its long-term financial health. As a smart city manager once observed: "any idiot can borrow money; the genius part is paying it back." This session will provide a policy-based approach to determining when taking on debt to finance important projects is appropriate – and when it isn't.

Preparing for Successful Revenue Ballot Measures

This session will provide key tips on strategies used by local agencies throughout the state in preparing for successful revenue ballot measures.

12-Step Program for Recovery from Fiscal Distress

The GFOA has developed a "12-step" program that provides a practical road map for agencies to recover from fiscal distress, leading to fiscal sustainability. This program will describe the GFOA's 12-step program, using the City of San Luis Obispo's Fiscal Health Contingency Plan as an example of how this can be an effective tool for recovery and sustainability.

Strategies for Downsizing Finance Departments in Tough Fiscal Times

In the wake of retirements and budget shortfalls, finance officers are being asked to reduce staffing and other operating costs in their own departmental budget while at the same time taking a leading organization-wide role in coping with fiscal challenges. How can finance departments best meet their organization-wide leadership role in terms of how they propose and manage cuts within their own department? What are some "lessons-learned" by other agencies in making reductions strategically based on value-added services, rather than reactively via across-the-board cuts? And what are some strategies for finance departments in balancing cuts with internal controls and customer service?

Integrating Goal-Setting and the Budget Process

At the end of the day, by allocating limited resources, budgets determine what will get done, and perhaps more importantly in lean fiscal times, what won't. This will happen whether the process is intentional in achieving this result – or not. Stated simply, the fundamental purpose of an effective budget process is to link what the agency wants to achieve over the upcoming budget period with the resources needed to do so. Most agencies have adopted a number of long-term goals through a variety of policy documents and plans – such as the General Plan (and its many related elements such as land use, circulation and housing), water and sewer master plans, pavement management plans and other long term plans. "Someday" the agency will accomplish all these goals. However, with limited resources, some process must be developed for evaluating priorities and determining which of these goals will be accomplished in the upcoming budget. This session will describe the City of San Luis Obispo's approach to linking goals with resources via the budget process, in both good times and bad, that:

- Identifies the most important things for the City to accomplish for the community.
- Establishes organizational responsibility and reasonable timeframes for achieving them.
- Allocates the resources needed for programs and projects to implement them.

The Power of Fiscal Policies

Good times come and go, but your values shouldn't – which is what fiscal policies are all about. Setting clearly articulated fiscal policies builds a strong foundation for protecting your agency's long-term fiscal health. As recent economic events have shown, no agency is immune to economic downturns. But agencies with clear fiscal policies in place with a tradition of following them have a significant strategic edge over those that don't. Policies make tough decisions easier by providing guidance both when times are good by preventing problems to begin with, as well as

when the inevitable tough times do arrive. This program provides practical insights and examples of how you can strengthen your agency's financial condition and improve fiscal decision-making through the power of policies.

Multi-Year Budgeting

The City of San Luis Obispo prepared its first two year Budget and Financial Plan in 1983, and has continued to use it as one of its core tools for fiscal planning and budget decision-making ever since, in both good times and bad. This session will describe the City's thirty-plus years of experience with this approach, including:

- What are the benefits of multi-year budgets?
- What are the potential downsides?
- What underlying concepts need to be in place in order to realize these benefits?
- What should other agencies consider in moving to a multi-year budget?

Financial Management for Non-Financial Managers (“Municipal Finance 101”)

Finance departments are not the only group responsible for an agency's fiscal health and operations: this is an organization-wide responsibility. This session will not develop “subject matter experts” in local government finance. However, participants will leave with a basic understanding of the core principles of local government financial management and their stewardship responsibilities in protecting public resources and preserving their agency's long-term fiscal health.

Financial Management for Elected Officials (“Municipal Finance 101”)

One of the most important roles of elected governing bodies is fiscal oversight of their agencies' financial operations – including one of their most important policy tasks: determining the highest priority uses of their agencies' limited resources via budget adoption. However, elected officials come their positions with an understanding of local government finance. Using the Institute for Local Government's publication *Financial Management for Elected Officials* as its framework, this session will provide elected officials with a practical introduction to their role in managing their agencies' fiscal affairs, covering topics such as:

- Overview of local government finance in California
- Budget development and monitoring
- Financial reporting and accounting
- Fiscal policies
- Long-term financial planning
- Cash management and investments
- Capital financing and debt management
- Purchasing and contracting practices

Long-Term Financial Planning

In these challenging and ever-changing fiscal times, it seems like it's hard to predict what's going to happen next week, let alone next year – or even more daunting, five or ten years from now. So, why should local governments take the time and effort to prepare long-term financial plans? Stated simply, because making good resource decisions today requires taking into account their impact on your fiscal condition tomorrow. Developing good solutions requires knowing the size of the problem you are trying to solve: you can't fix a problem you haven't defined. And in this economic and fiscal environment, looking only one year ahead is almost certain to misstate the size and nature of the fiscal challenges ahead of you. This training provides practical approaches for preparing effective long-term financial plans.

Trainer Experience

Visit my web site for additional information about me at www.bstatler.com

