

SPRING CONFERENCE

Jackson, Tennessee – March 9-10, 2023



MEET OUR INSTRUCTORS



Lori Barnard

Financial Analyst, Division of Local Government Finance
Tennessee Comptroller of the Treasury

Lori joined the Comptroller's Office in October 2013. She earned her MBA and BSBA with a concentration in finance from The Ohio State University. Lori has worked with many local governments across the State of Tennessee and enjoys working with elected officials and finance staff to make government work better. Currently, she is assigned to 17 counties which constitute the Division of Local Government Finance - Region 1: Upper East Tennessee. Her professional background includes corporate finance (reporting and budgeting) and mortgage lending. She is the mother of three grown children: Jessica, Leah and Blake, and proud Grammie to Tucker Smith.



Lisa Boone, FLMI, ACS

Account Executive
American Fidelity

Lisa has 31 years of experience working with the public sector and their benefit needs. She has vast knowledge regarding building a benefit plan that is meaningful to employees while streamlining processes for the employer with customized solutions. She spends the majority of her time in the field with customers elevating benefits and processes. She also has experience managing field agents, managing internal staff, policy management, product development, association partnerships, consortium partners and managing a successful open enrollment process that is relevant to employees. She has been involved in public speaking for over 35 years. Lisa has been married for 30 years and they have four children.



Chuck Downham

Municipal Management Consultant
Institute for Public Service/Municipal Technical Advisory Service (MTAS)

Chuck serves the Municipal Technical Advisory Service as a Municipal Management Consultant. He has over 36 years of municipal management, planning, and project management experience in both the private and public sector. Prior to joining MTAS in 2021, Chuck served as the Assistant City Administrator for the City of Spring Hill, Tennessee where he provided management oversight in the areas of development services, capital improvement planning, project management, and municipal operations. Chuck has also served the cities of Tullahoma, Collierville, and Lakeland,

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Tennessee in a variety of roles ranging from oversight of economic development and community planning to municipal services to serving as City Administrator.

Chuck received a Bachelor of Art degree and a Master of Science in Planning degree from the University of Tennessee. He is a member of the American Planning Association (APA), the TN Chapter - American Planning Association (T APA) where he has served as Chapter Treasurer and was recently inducted into the Tennessee Planning Leadership Council, and the Tennessee City Managers Association (TCMA).



Nate Fontenot

Financial Analyst, Division of Local Government Finance
Tennessee Comptroller of the Treasury

Nate is the Region Six (Lower West) Financial Analyst in the Division of Local Government Finance at the Tennessee Comptroller. Nate is responsible for approving budgets and debt for entities within his region, while also providing assistance to questions that arise from local Governments. He also assists with data analysis, compiling financial reports and creating metrics to measure and visualize the data.

Additionally, Nate serves as Staff to the two Utility Boards, where he oversees managerial, financial, and technical issues of Utilities in the Western Region. He also helps to provide the Utility Boards with recommendations and reports of utility systems around the State.

Nate joined the Comptroller's Office in 2022, after completing an internship over the previous summer. Nate is a graduate of the Tennessee Technological University, where he received a Bachelor's in Finance. He is working to complete his Master of Business Administration from Tennessee Tech.

Nate currently lives in Putnam County. In his spare time, Nate enjoys spending time outdoor playing Disc Golf and Soccer, as well as keeping an aquarium. He also enjoys cooking and working on automobiles.

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Brad Harris

Finance and Accounting Consultant
UT Municipal Technical Advisory Service

Brad Harris is a finance and accounting consultant with the University of Tennessee's Municipal Technical Advisory Service (MTAS). He has served as a member of the GFOA Budget and Fiscal Policy Committee as well as on the board of several not-for profit entities. Brad is a CPA and a Certified Municipal Finance Officer, and prior to working for MTAS he served as the finance director for the City of Athens, TN and Rhea County, TN. Brad's passion is to help others grow in the field of government accounting. He teaches frequently through the United States on a variety of accounting topics, and had been designated as a Distinguished Fellow in Professional Practice by the University of Tennessee Masters in Public Policy and Administration Program. He is a graduate of Tennessee Tech University and lives in Dayton with his lovely wife Beth and daughter Katie. His older daughter Hannah resides in Columbia, TN.



Victor Lay

Town Manager
Town of Nolensville, Tennessee

Victor Lay graduated Memphis State University in 1989 with a Bachelor's Degree in Civil Engineering. Victor is a registered Professional Engineer in the state of Tennessee. He practiced five years in the Transportation field in Chicago area Before moving back to his hometown of Waynesboro TN (pop. 2300) taking the job as their city manager in 1995.

Victor completed his Master's in Public Administration in December 2009 and was employed as the city of Spring Hill Administrator. While in Spring Hill, Victor received a peer award from the Tennessee City Management Association as the 2013 City Manager of the Year. Victor remained with the city of Spring Hill experiencing significant growth from 27,000 to just over 50,000 population in the 2020 Census.

Victor has been with the Town of Nolensville since January 2021 once again experiencing a rapidly growing community. Victor has been married to Bethany, a Vice-President with Columbia State College for 34 years. They have three grown children.

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Ursula Madden

External Affairs Director, BlueOval SK
Ford

As part of the government relations team for Ford, Ursula was hired in October of 2022 as the External Affairs Director for BlueOval SK—the Joint Venture between Ford and SK On to build electric vehicle batteries for future Ford and Lincoln brands. The external affairs team is responsible for government relations, community engagement, communications, and marketing for BlueOval SK.

Prior to joining Ford, Ursula served at the Chief Communications Officer and Government Relations lead for Mayor Jim Strickland. She was also the main anchor for the local NBC affiliate in Memphis and worked as an award-winning broadcast journalism for more than 20 years.

Ursula currently serves on the board of United Way MidSouth, and the Memphis Brand Initiative. She's a past board member of Church Health and Saint Mary's Episcopal School for Girls. And a contributes time to the Women's Foundation for a Greater Memphis.

Married for 25 years to her husband Bill, they are blessed to have one daughter, Laurel who will be a rising senior at the end of the year.



David Moore

Police Management Consultant
UT Municipal Technical Advisory Service (MTAS)

David served the City of Martin Tennessee in the police service from 1989 to 2015 in a variety of roles from entry level dispatcher through Chief of Police. Upon retirement as Chief at Martin Police Department, David served as a Vice President for Savant Learning Systems and as a criminal justice faculty member in UT Martin's Department of Behavioral Science. In 2019, David joined UT MTAS as a police management consultant for Middle and West Tennessee. David has a bachelor's degree in criminal justice from University of Tennessee at Martin and a master's degree in criminal justice from Bethel University. He is a graduate of the 195th Session of the FBI National Academy and is a past president of the Tennessee Association of Chiefs of Police.

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Samuel W. "Dub" Oliver

President
Union University

Oliver was elected as Union's 16th president in 2014. Under his leadership, Union began and completed construction of The Logos, a new 54,000-square-foot library that opened in November 2015. The three-story facility is a state-of-the-art academic resource center for the university featuring expanded space for library holdings, study and meeting rooms, the Modero coffee shop, administration offices and archives. In 2019, Oliver led Union to merge with the Memphis Center for Urban and Theological Studies (now the Memphis College for Urban and Theological Studies).

Oliver led Union in 2015 to adopt "United in Spirit. Grounded in Truth." - a strategic plan to guide the work of the university over the next five years. The plan emphasizes seven strategic themes: bearing witness to the transforming power of the gospel of Jesus Christ, expanding enrollment across the university, enhancing operational effectiveness and efficiency to advance the mission, revising the liberal arts core curriculum, supporting meaningful research among faculty and students, developing leaders for the future and bolstering student life and building community.

Also under Oliver's leadership, Union launched the EDGE program for students with intellectual and developmental disabilities and collaborated with five other local educational institutions to start Mentor U, a mentoring program for area sixth graders. Oliver has also been active in the Jackson community, especially in the area of racial reconciliation.

A native of San Antonio, Texas, Oliver completed a Bachelor of Science degree in education from Baylor University and a Master of Science degree in educational psychology and a Doctor of Philosophy in educational administration from Texas A&M.

He previously served as president of East Texas Baptist University and in a variety of positions at Baylor, including director of student activities, associate dean for campus life, dean for student development and vice president for student life.

While at Baylor, Oliver also served as a visiting professor in the Hankamer School of Business, an adjunct professor in the School of Education and interim university chaplain. He served in the U.S. Air Force in the late 1980s at Carswell Air Force Base in Texas.

Oliver and his wife Susie Combs Oliver have one daughter, Callie (married to Zach); one granddaughter, Betsy; and one grandson, Oliver.

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Donald Pannell

Fire Management Consultant
UT Municipal Technical Advisory Service (MTAS)

Donald entered the fire service in August of 1994 as a firefighter/EMT for the Memphis Fire Department. He rose through the ranks to become a division chief in 2014 and served as the Assistant Fire Marshal for the department. Donald retired from the MFD in November of 2021 and began serving as a fire management consultant for the University of Tennessee's Municipal Technical Advisory Service (MTAS). Donald has bachelor's degrees in political science and journalism from the University of Mississippi and a master's degree in operations management from the University of Arkansas. He is a graduate of the National Fire Academy's Executive Fire Officer Program and is one of six individuals in Tennessee designated as a Fire Marshal from the Center for Public Safety Excellence.



Kelsey Schweitzer

County Government Consultant
UT County Technical Assistance Service (CTAS)

Kelsey joined UT CTAS in October 2017 as county government consultant for the southern West Tennessee region. He previously worked for the Tennessee Comptroller of the Treasury as a legislative auditor and in the banking industry. He earned a Master of Business Administration degree in 2017 and a Bachelor of Science in Business Administration, summa cum laude, in 2010, both from the University of Tennessee at Martin. Kelsey also earned the Certified Government Financial Manager designation in 2019.



Christy N. Tennant

Deputy Director, Division of Investigations
Tennessee Comptroller of the Treasury

As Deputy Director with the Tennessee Comptroller's Division of Investigations, Christy is responsible for overseeing and directing investigations involving fraud, waste and abuse in local governments, state agencies, and other publicly funded entities.

Christy has worked with the Comptroller's Office for over 24 years. She has directed investigations, resulting in the discovery of fraud, waste and abuse and the prosecution of public officials and employees. Christy has also worked closely with the TBI, the FBI, local District Attorneys General, and local law enforcement groups.

A graduate of Tennessee Technological University, Christy is also a Certified Public Accountant, Certified Financial Government Manager, and a Certified Fraud Examiner. She provides training to professional groups related to internal controls and fraud.

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Adam Tschida

Technical Manager, Division of Local Government Finance
Tennessee Comptroller of the Treasury

Adam began working in the Tennessee Comptroller's Office as an analyst in February 2020.

During his time with the Comptroller's Office, Adam's responsibilities have included assisting Tennessee cities, counties, and other governmental entities with debt and budgetary compliance and helping local governments navigate financial distress. He also supports data initiatives such as fiscal distress modeling, data visualization, and other various analytical projects.

Prior to joining the Comptroller's Office, Adam worked as an equity analyst with New Constructs leveraging artificial intelligence to build valuation models for various companies across an array of sectors. He also worked in several roles from portfolio performance monitoring to tax compliance at UBS Financial Services.

Adam holds undergraduate degrees in Finance and Economics from Middle Tennessee State University. In addition, he is close to completing an undergraduate Data Science program. Afterwards, he plans on pursuing a masters in Artificial Intelligence.

Adam is a National Park enthusiast and enjoys hiking, photography, and coding.



Marc Woerner

Town Administrator
Town of Atoka, Tennessee

Marc Woerner was appointed as Town Administrator of the Town of Atoka, Tennessee in July 2020, after serving as a Township Manager in Pennsylvania from 2015-2020. He has 13 years of municipal government experience beginning as an elected official in 2010.

His collaborative leadership approach maintains a positive working relationship with the Board of Mayor and Aldermen, including Town Staff, and enhances cooperation with our regional partners and other local governments in our area. During his tenure, the Town of Atoka has worked to improve road maintenance, modernize wastewater infrastructure, and actively deploy professional police and fire services.

He is an active member of the Tennessee City Managers Association where he serves on Professional Development and Ethics Committees. Mr. Woerner serves on the South Tipton Chamber of Commerce Board of Directors, West Tennessee Rural Planning Organization, and served as a past President of the York County Association of

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Townships of the Second Class, Vice President of the York County Municipal Administrators Association, and the York County Department of Emergency Services Public Safety Advisory Board.

Mr. Woerner possesses a Certified Public Manager designation from the University of Tennessee Institute for Public Service, his Certified Municipal Finance Officer credentialing from the State of Tennessee and is a graduate of the Pennsylvania Municipal Government Academy. He married his high school sweetheart, and they have two children. He enjoys traveling and riding motorcycles.