

BASA/OASBO Superintendent/Treasurer Symposium

Course Description Quick Guide

Course Name	Course Description
<p>Developing Your Financial Plan - Operating and Capital Forecast</p> <p>Todd Griffith, Treasurer, Licking Heights Local School District, Marvin Founds, Director, Municipal Advisor, Baker Tilly</p>	<p>This course will cover an overview of the Five-Year forecast of general funds and how it dovetails in with a larger long-term capital plan that a school district should have which may include P.I. Funds and bond funds to accomplish. This planning can help protect the General Fund and the Five-Year forecast from emergency capital needs that could hurt a district's operating position. The course will provide superintendents, business managers and treasurers with advice on how to prepare a long-term capital plan and then look for funding sources to ensure capital is maintained and from what source of revenues so that the General Fund cash balance degradation can be minimized by emergency capital issues that can arise. Leadership's understanding of how a long-term capital plan can address concerns over large ticket costs that could impact the General Fund forecast if other avenues of funding such as bond issues and permanent improvement levies are not considered as part of the funding mix. Knowing the type of debt and mix of funding sources is key to funding this long-term plan and in protecting the General Fund.</p>
<p>Fair School Funding Plan - Phase II Complete - Preparation for Phase III</p> <p>Ryan Pendleton, Executive Director, North Coast Shared Services Alliance, Thomas Hosler, Superintendent, Perrysburg EVSD, Jenni Logan, Treasurer/CFO, Sycamore Community City Schools, Michael Hanlon Jr., Superintendent, Chardon Local School District</p>	<p>This course will cover an overview of the status of the Fair School Funding Plan, the first two years of implementation, and the full phase-in of the FSFP. Participants will learn about how the current political landscape affects FSFP as well as the potential cost to fully phase-in the FSFP. The completed studies and their impact will be discussed, as well as other variables that could affect the FSFP.</p> <p>The course will provide essential updates regarding the Fair School Funding Plan, how the FSFP can affect different districts and the full phase in of the FSFP.</p> <p>Understanding the Fair School Funding Plan and the implications of any changes is essential to CFOs to properly prepare their five-year forecasts.</p>
<p>Investing Resources for Student Achievement - Spending and Cash Flow Benchmarks</p> <p>Ryan Ghizzoni, Senior Analytics Advisor, Frontline Education</p>	<p>This session will help walk attendees through the benefits of data analysis and benchmarking as they specifically relate to instructional spending and student achievement. We'll discuss the benefits of internal year-over-year analysis – analyzing and asking yourself what has changed over the years, and what impact has it had to student achievement? Moreover, we'll discuss the additional advantage of benchmarking your district to peer districts across the state and locally. How do you determine the best peer group for comparison, and what can you learn regarding your spending, cash balances, and student results by looking to others? This course will provide attendees with a discussion and examples of:</p> <ul style="list-style-type: none"> • Historic data trends and perspective, from financial to academic – are current investments yielding expected student achievement at your District? Is there any correlation over the years? • Benchmarking to peers for context – how do you determine who are your benchmark districts? Do you look locally, or statewide, and why? What can you learn from peer districts? • Overarching discussion on the benefit of easy-to-digest data visuals – leadership success when presenting data quantitatively versus qualitatively. <p>Thorough understanding of a district's finances, including where they have been and where they are projected to go, is critical for any district CFO or decision maker. District leadership needs to effectively balance spending with revenue, have appropriate cash on-hand to meet obligations, all the while ultimately ensuring they are yielding student achievement and supporting classroom learning. Understanding and managing to those goals will yield long term success for the students, the district, and ultimately financial longevity.</p>

<p>Best Practices for Stakeholder Engagement - Faculty, Staff, Board, Community Collaboration</p> <p>Jennifer Economus, Partner/VP of Strategy, Allerton Hill Communications, Rebecca Mayr, Director of Client Strategy, Allerton Hill Communications</p>	<p>This course provides participants with strategies for effective stakeholder engagement, emphasizing collaboration between faculty, staff, school boards, and the wider community. Participants will learn to navigate the complexities of communication, understand diverse stakeholder perspectives, and apply best practices to foster meaningful collaboration. Through interactive scenarios and case studies, the course aims to equip attendees with the tools necessary to build trust and work cooperatively toward common educational goals. By the end of this course, participants will be able to:</p> <ul style="list-style-type: none">• Identify key stakeholders in the educational environment and their unique interests.• Utilize best practices in communication to engage faculty, staff, board members, and the community effectively.• Develop strategies to overcome challenges in stakeholder collaboration.• Implement techniques for building trust and consensus among diverse groups.• Evaluate the impact of engagement strategies on school and community outcomes. <p>Effective stakeholder engagement is critical for the success of educational initiatives and the overall health of school communities. This course provides school business officials and educational leaders with the necessary understanding and skills to engage stakeholders in a manner that supports informed decision-making, fosters transparency, and enhances collaborative efforts. Mastery of these skills ensures that officials can navigate the varied landscapes of school and community interests, leading to better educational outcomes and stronger community support.</p>
<p>Educating Stakeholders on the Financial Needs of the District - Dos and Don'ts</p> <p>Katie Johnson, Deputy Executive Director, Ohio Association of School Business Officials (OASBO), Nicole Donovsky, Attorney, Bricker & Eckler LLP</p>	<p>This course will cover an overview of legal provisions and Auditor of State Guidance related to the conduct that a school district, public officials and public employees may and may not engage in relative to levy and bond campaigns. To learn legal permissions and prohibitions related to conduct relative to levy and bond campaigns. To identify best practices in communicating district financial and facilities information. Understanding the legal limitations and best practices relative to levy and bond campaigns and communicating district facilities, financial and operations information is critical for every school business official.</p>