

OASBO 2019 Northeast Region Chapters Joint Workshop

Course Description Quick Guide

Course Name	Course Description
Uniform Grant Guidance Procurement Update Zac Morris, CPA, MBA, Director of Government Services, Principal, Rea & Associates, Inc.	<p>This course will provide an understanding of uniform grant guidance procurement rules by discussing: determine when the procurement requirements are effective for your entity; differentiate the allowable methods of procurement; recognize the allowable methods of procurement, and the indicators of a contractor versus sub-recipient relationship.</p> <p>Understanding uniform grant guidance procurement rules is important for a school business official to properly implement and manage.</p>
Recent Changes to SEC Debt Disclosure Rules Austin McGuan, Director, Stifel, Nicolaus & Company	<p>This course provides an overview of amendments to SEC Rule 15c2-13 and will share changes and reasoning behind the new rules like the prohibition of a broker, dealer, or municipal securities dealer from purchasing or selling municipal securities; share changes and reasoning behind the new rules like prohibition of a broker, dealer, or municipal securities dealer from recommending the purchase or sale of a municipal security.</p> <p>Understanding the changes to these rules is important for a school business official to appropriately monitor and manage debt issuances, and the relationships between advisors, issuers and borrowers.</p>
Getting the Most from Your Bond Issue in Today's Market Michael Prcela, Senior Vice President - Public Finance, Sudsina & Associates	<p>Current market conditions offer challenges and opportunities for school districts to make the most of their bond issue dollars. This presentation will use a case study to demonstrate how to best strategize to fend off the challenges and take advantage of the opportunities available.</p> <p>Understanding the current bond market is important for a school business official to properly advise a Board of Education and make decisions as to when the most opportune moment might be to issue debt.</p>