OASBO Fall School Finance Workshop - NE Region
Course Description Quick Guide

Course Name	Course Description
Grants Management Brian Jones, Executive Director, Office of School Finance, Ohio Department of Education	This session will discuss the various aspects of the grants management process at both the state and district levels. This discussion will include navigating and working in ODE's e-grant system (CCIP), address any future updates, identify uniform guidance sections of interest (such as policy and procedures and internal controls) and compliance monitoring results. Managing grants is an important facet of the operations of a district. However, training on specific requirements and use of the CCIP are limited. This session is geared to provide treasurers with the needed information to ensure they manage grants effectively and efficiently all the while ensuring they stay within federal compliance.
Capital Financing John S. Larson, Partner, Squire Patton Boggs, Heather Vlasuk, Senior Attorney, Squire Patton Boggs, Patrick King, Managing Director, STIFEL	This course will cover an overview of recent developments that impact how public school districts can borrow in today's market. Some topics that will be discussed include the impact of the TAx Cuts and Jobs Act on municipal finance, recent federal security regulation changes, state level legislation and policy developments, and tax levy law updates. This workshop provides a concise summary of recent changes that impact how Ohio public school districts borrow to finance school facilities and to refinance existing debt. Understanding the process of issuing bonds is very important for every school business official. There have been quite a few recent developments that impact how debt is issued.
Investments Jennifer C. Trowbridge, CFA, Managing Principal & Portfolio Manager, RedTree Investment Group	This course will provide an overview of various investment vehicles available to public school districts. This will give school business officials the information they need to help make informed decisions with how to invest funds, including the pros and cons of the various investment types. This course will provide attendees with an overview of a variety of methods for investing excess funds. There are specific investments permitted by Ohio law allowed for school districts. Understanding the various investment types available to school districts is critical for school treasurers.
Protect Your Treasurer License - ODE Licensure Code of Professional Conduct Katie Johnson, Deputy Executive Director, Ohio Association of School Business Officials (OASBO)	This course will cover the rules and requirements of the Licensure Code of Professional Conduct, as well as the applicable Ohio Ethics Laws and related statutes applicable to school district treasurers and other school business officials. Topics covered will include the limits and ramifications of public officials and employees from engaging in soliciting or accepting substantial and improper things of value, including, outside employment or consultation fees, gifts, or travel, meals and lodging, from those dealing or seeking to do business with the public agency. 1. Understand the Ethics Laws and related statutes as they apply to activities affecting school district CFOs and other district employees. 2. Be able to spot potential ethical issues before they become a problem and address them. 3. Be able to communicate these issues to school boards and other school staff. 1 The course will enhance the attendees' understanding of the Ohio Ethics Laws and related statutes so that school district officials and employees can understand the rationale behind the laws in order to assist in identifying issues and helping to protect themselves and their districts from violations and liability, as well as to protect the public's trust in our public agencies.