

Ohio University Leadership Project Course Description Quick Guide

Course Name	Course Description
Winds of Change-Big things are happening in the bond market Scott Stubbins, Managing Director, Stifel Financial Corporation	<p>This presentation will update attendees on the current market for municipal bonds. We will examine the 30 year bond rally and analyze whether the bull market is changing its trend. What a change in trend would mean to school treasurer's investments and bond financings going forward. Attendees will learn about the effects of the tax act on the municipal market and how it will impact how they borrow money.</p>
Things you should know about issuing debt David Tiggett, Director, KeyBanc Capital Markets	<p>This course examines the fundamental concepts and techniques for issuing debt. An effective finance manager must understand several aspects of financing capital improvements for their communities. Participants will develop a critical perspective on the debt issuance process. We will discuss ways debt can be issued, details of the issuance process, role/responsibility of each participant, and recent changes in the municipal market.</p> <p>At the end of the workshop participants will be able to 1) identify and describe the types of debt issuances ; 2) to begin the issuance process and determine should be involved; and 3) have a general understanding of the municipal market.</p>
Municipal Finance: The Current Market and Strategies to Save Districts Money Eric Prall, Managing Director, Ross, Sinclaire & Associates, LLC	<p>The course covers strategies Districts can use to save money such as refunding bonds, and energy conservation projects. Additionally, there will be an overview of the hot topic of continuing disclosure compliance. The course will also cover the effects of the recent Tax Cut and Jobs Act on the market for bonds issued by school districts.</p> <p style="text-align: center;">Learning Objectives:</p> <p style="text-align: center;">Understanding how refunding bonds and energy conservation projects can offer savings to Districts.</p> <p style="text-align: center;">Understanding how to complete continuing disclosure requirements.</p> <p style="text-align: center;">Understanding effects of the Tax Cut and Jobs Act on the municipal bond market.</p>
Cash Management and Investments Stuart Dekker, AVP and Trust Officer, Peoples Bank	<p>Bank Relationship Management & Treasury Management Learning Objectives : Products and Services Available to more effectively manage cash flow.</p> <p>Presenters: Mary Jane West - Biography over 30 years banking and treasury management experience, specifically in the public funds sector, dealing with schools, townships, counties and other public entities.</p> <p>Back-up presenter: Nick Salsgiver - Biography over 10 years experience in treasury management experience.</p> <p>Investment Policy / Market Update / Types of Eligible Securities / Understanding Economic Data Public Funds Management and the yield curve.</p> <p>Learning Objectives: Providing an inside look at the investment process and the vehicles for achieving competitive returns.</p> <p>Presenters: Scott Keller, CFA, 25 years investment management experience and portfolio management Stuart Dekker, MBA Finance 30 years investment and accounting experience.</p>