

## Ohio University Leadership Project Course Description Quick Guide

Course Name	Course Description
<b>Property Valuation and School Funding Update</b> Mike Sobul, Consultant, Public Finance Resources, Inc.	<p>Description: The speaker will address CAUV, Pipeline and other tax valuation issues and give an update of the Cupp-Patterson school funding workgroup</p> <p>Learning Objectives: Understand forecasting issues with changing CAUV and new pipeline valuations and to understand the potential impact of school funding changes recommended by the Cupp-Patterson workgroup.</p> <p>Rationale: Changing CAUV and new pipeline values can have a significant impact on the finances of school districts impacted by them. Understanding those impacts will help the CFO with budget forecast and simulating economic and cash effects on the districts. The recommendations of the Cupp-Patterson workgroup may have important implications for future state aid to schools. Understanding the changes that may occur also will assist in forecasting.</p>
<b>Local Valuations and State Funding</b> Stacy Overly, Consultant, Public Finance Resources, Inc.	<p>Course Description? How do local tax values (and other local wealth measurements) impact state funding in the current funding formula. Should we expect a change in future funding formulas?</p> <p>Course Learning Objectives? Demonstrate the inverse relationship between local per-pupil wealth and state funding. Also, provide examples of “Capped”, “Formula” and “Guarantee” school districts as well as the factors that influence each status.</p> <p>Statement of Accreditation Rationale? Estimating revenue is an integral piece of investment planning.</p>
<b>Tax Reform Bill; It wasn't just tax cuts....</b> David Tiggett, Director, KeyBanc Capital Markets	<p>Course Description? : In this course we will review the changes resulting from the 2017 Tax Reform Bill along with the impact on issuers of tax exempt debt. Additionally, we will discuss options issuers have when refinancing existing debt post Tax Reform.</p> <p>Course Learning Objectives? At the end of the workshop participants will be able to 1) understand the impact of tax reform on tax-exempt financing ; 2) understand was refinancing options they have and 3) have a general understanding of current municipal market.</p>
<b>Challenges and Opportunities when Investing District Funds</b> Ryan K. Nelson, CFA, Co-Founder/ Portfolio Manager, RedTree Investment Group	<p style="text-align: center;">1</p> <p>Course Description: This course will provide an update on current market conditions and provide an overview of various investment vehicles available to school districts. This will give school business officials the information they need to help make informed decisions with how to invest funds.</p> <p>Course Learning Objectives: The course will provide a review of various types of investments available to public school districts. The presentation will also discuss the pros and cons of the various investment types.</p> <p style="text-align: center;">2      Statement of Accreditation Rationale:</p> <p>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.</p>