

OTA 2019 Annual Winter Conference & Trade Show

Course Description Quick Guide

Course Name	Course Description
Forecasting for & Financing Purchases Eric Prall, Managing Director, Ross, Sinclair & Associates, LLC, Paul Rutter, Of Counsel, Bricker & Eckler	This session will focus on strategies for forecasting and budgeting for the acquisition and replacement of equipment and other significant purchases and projects, including building construction. The discussion will also cover unvoted and voted borrowing methods for financing such purchases and acquisitions.
There's a Grant for That (1) Heidi Fought, Director of Governmental Affairs, Ohio Township Association	Townships, like all other governments, are seeing a reduction in revenue yet their service requirements have not reduced. Attendees will leave with a better understanding of the different types of grants available to townships and where to find information and applications.
Cyber Security Training Cal Anderson, IT Specialist, York Risk Management	Come learn about and be trained on cyber security prevention and awareness. The training provides comprehensive and pointed visuals, which indicate the effects of cyber related attacks as well as how prevent and recover from them. The content provided will help you build and cultivate security awareness by focusing on key cyber security risks and control directives.
Community Reinvestment Areas - A Tool for Township Development Chris Connelly, Attorney, Taft Stettinius & Hollister	The Community Reinvestment Area (CRA) Program is a direct incentive tax exemption program benefiting property owners who renovate existing or construct new buildings. This program permits municipalities and counties to designate areas where investment has been discouraged as a CRA to encourage revitalization of the existing housing stock and the development of new structures. This session will guide attendees in the advantages of using this non-township economic development tool for township growth.
Ohio's Property Tax System Larry Long, Consultant, Ohio Projects Group LLC	County government's primary source of revenue is the "piggyback" sales tax. Many municipalities rely on the local income taxes as the primary source of general fund revenue. For townships, the property tax is the mainstay of township operations. This session will focus on the history of Ohio's property tax, constitutional limitations on the tax, and how the system has evolved and is currently administered. Got questions about Ohio's property tax credit programs, how property is appraised, tax reduction factors, fixed sum and fixed rate levies, tax abatements, or delinquent taxes? Then this session is for you.
Township Law Update Jennifer Huber, Attorney, Brosius, Johnson & Griggs, Don Brosius, Attorney, Brosius Johnson & Griggs	Come review and discuss 2018 legislation, court cases, and other laws and regulations that could affect your township. This session will enhance the background and working knowledge of township fiscal officers in government accounting, budgeting and financing as the course will review recently enacted legislation that includes provisions relating to the use of township funds, TIFs, new levy options and many more. Come learn how to implement these new laws!
Fiscal Responsibilities of Trustees Larry Long, Consultant, Ohio Projects Group LLC	The most important thing to remember as a township trustee is that the money you are responsible for is <i>not your money</i> . You are safeguarding it for the public to be used for the operation of the township and for providing services to residents. This session will provide an overview of the fiscal responsibilities of the members of the board of township trustees.
Nuts & Bolts of Debt Financing Brad Ruwe, Partner, Dinsmore & Shohl LLP, Bryan Eckert, National Municipal Finance, Zions Bank	This session will discuss the procedural steps to issuing debt, provide an overview of the different types of bonds, provide insight into the bond registrar and paying agent functions, and discuss debt limitations, bond structures, the rating process, and disclosure issues.
Policy & Procedure manuals: Is Yours Up-to-Date? Ben Yoder, Attorney, Frost Brown Todd LLC	The first half of this presentation will provide a general overview of core public records, banking, data security and employment policies that every township should have in their policy and procedure manuals. Then we will take a deep-dive into several modern policies, and tweaks to existing policies, townships should consider including in their policy and procedure manuals in light of recent legal updates.

<p>Liability of a Fiscal Officer Don Brosius, Attorney, Brosius Johnson & Griggs, Jim DeLucas, Insurance Specialist, Burnham & Flower Agency</p>	<p>This session will focus on the liability of the fiscal officer when things don't get done in the township. For example, notice not properly filed, bills paid late or not at all, refusing to issue checks due to lack of money in an account or issuing a check for an inappropriate township expense. What type of actions would cause a fiscal officer's bond to be collected upon? Come find out the answer to this question and many more.</p> <p>**This session was approved for credit at our 2009 Winter Conference.</p>
<p>Economic Development 101 Chris Connelly, Attorney, Taft Stettinius & Hollister</p>	<p>Townships have numerous tools that can be utilized to encourage economic development within their jurisdiction. Come learn how your community can take advantage of all of the tools in the toolbox.</p>
<p>Policy & Procedure Manuals: Is Yours Up-to-Date? (repeat) Ben Yoder, Attorney, Frost Brown Todd LLC</p>	<p>The first half of this presentation will provide a general overview of core public records, banking, data security and employment policies that every township should have in their policy and procedure manuals. Then we will take a deep-dive into several modern policies, and tweaks to existing policies, townships should consider including in their policy and procedure manuals in light of recent legal updates.</p>
<p>Banking Relations Best Practices Tony Okray, SVP, Government Banking Relationship Manager, Huntington Bank</p>	<p>A general study and history of banking and it's relationships with public treasurers. Includes best practices, product, services and goals and objectives to make your banking relationship run smooth.</p>
<p>Fiscal Officer 101 Linda Oda, County Recorder, former Township Fiscal Officer, Warren County, Chris McKee, Assistant Project Manager, Auditor of State, Mary Pawlowski, Fiscal Officer, Montville Township, Medina County</p>	<p>Fiscal Officer 101 is presented by an AOS representative and two knowledgeable fiscal officers who have seen it all. This discussion will delve into such issues as important deadlines and repercussions of missing them, setting up your office to be the most efficient and effective, handling cash, surviving audits, and explaining why you are NOT an employee of the trustees and your responsibility to the team. Fiscal officers have a huge responsibility, and we will attempt to help you navigate these waters and answer your questions.</p> <p>**A similar session was approved for credit in 2010 for Winter Conference - "How to be an Effective Fiscal Officer"</p>
<p>Ohio's Property Tax System (repeat) Larry Long, Consultant, Ohio Projects Group LLC</p>	<p>County government's primary source of revenue is the "piggyback" sales tax. Many municipalities rely on the local income taxes as the primary source of general fund revenue. For townships, the property tax is the mainstay of township operations. This session will focus on the history of Ohio's property tax, constitutional limitations on the tax, and how the system has evolved and is currently administered. Got questions about Ohio's property tax credit programs, how property is appraised, tax reduction factors, fixed sum and fixed rate levies, tax abatements, or delinquent taxes? Then this session is for you.</p>
<p>Implementing New Credit Card Policy Thomas Dusek, Audit Manager, Auditor of State's office</p>	<p>All about House Bill 312 – this session will review why the legislation was necessary, as well as the specific items that should be included in the township credit card policy and township specific requirements.</p>
<p>Digging for Data - Fraud Mike Moran, President, Affiliated Resources Group</p>	<p>The ability to collect and interpret an infinite amount of information is a relatively new phenomenon - one that has ushered in a new era of data-driven intelligence. While this intelligence can be used by criminals to construct sophisticated phishing schemes and identify theft scams, legitimate businesses can collect and manage data as an effective means to improve their sales cycle and even to detect fraud. We will explore the importance of "Big Data" and how to turn your data collection efforts inward while converting your data into something manageable and meaningful.</p> <p>**This course was approved for credit for another organization back in 2015 with a different speaker from the same firm.</p>

<p>Evaluating & Improving Your Procurement Process Keith McDevitt, Vice President of Business Development , Sourcing Alliance</p>	<p>The purpose of the discussion is to identify specific best practices that libraries can incorporate into their request for proposal (RFP) process to achieve their procurement objectives more often and more consistently. The goal is for each attendee to come away with at least one immediately actionable takeaway. Discussion will center on the three alternative methods public sector entities can utilize to purchase/spend taxpayer dollars and the pros and cons of each.</p> <p>**This session was approved for credit at an Ohio Library Council event earlier this year.</p>
<p>Township Law Update (repeat) Don Brosius, Attorney, Brosius Johnson & Griggs, Jennifer Huber, Attorney, Brosius, Johnson & Griggs</p>	<p>Come review and discuss 2018 legislation, court cases, and other laws and regulations that could affect your township. This session will enhance the background and working knowledge of township fiscal officers in government accounting, budgeting and financing as the course will review recently enacted legislation that includes provisions relating to use of township funds, TIFs, new levy options and many more. Come learn how to implement these new laws!</p>
<p>Current Trends in Public Funds: Investing & Financing Katie Kleinfelder, Director, RBC Capital Markets, Jennifer C. Trowbridge, CFA, Managing Principal & Portfolio Manager, RedTree Investment Group</p>	<p>This course covers current trends in a variety of areas in regards to investing and financing including: the economy; the Federal Reserve; interest rates; the municipal bond market; Tax Cut and Jobs Act of 2017; current market conditions; advanced refunding; current refunding; Build America bonds; and an Ohio ratings update.</p> <p>**This course was approved for credit for another organization.</p>
<p>Demystifying Inside Millage Rebecca C. Princehorn, Esq., Partner, Bricker & Eckler LLP</p>	<p>Attendees will review the history and evolution of inside millage, with emphasis on how inside millage is allocated among overlapping subdivisions. The presenter will also explain the various uses of inside millage - current expenses, special purposes such as road and bridge and for debt charges on unvoted general obligation debt.</p>
<p>Implementing New Credit Card Policy (repeat) Thomas Dusek, Audit Manager, Auditor of State's office</p>	<p>All about House Bill 312 – this session will review why the legislation was necessary, as well as the specific items that should be included in the township credit card policy and township specific requirements.</p>
<p>There's a Grant for That? (2) Heidi Fought, Director of Governmental Affairs, Ohio Township Association</p>	<p>Townships, like all other governments, are seeing a reduction in revenue yet their service requirements have not reduced. Attendees will leave with a better understanding of the different types of grants available to townships and where to find information and applications.</p>