

OAPT 2021 Annual Conference

Course Description Quick Guide

| Course Name | Course Description |
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| <p>Cost Management Strategies in Health Insurance for Public Entities</p> <p>Justin Wiedle, CPA, Employee Benefits Consultant, McGohan Brabender</p> | <p>Join this session to hear about cost management strategies that are driving financial results for public entities. This course will provide strategies for cost management related to medical insurance, including: eligibility management, health risk management, member cost sharing, and other strategic broker services.</p> |
| <p>Applying Best Practices when Making Investment Decisions</p> <p>Jason Click, President Public Funds, Meeder Investment Management, Eileen Stanic, CTP, Senior Public Funds Advisor, Meeder Investment Group</p> | <p>Participants will gain practical knowledge related to their investment responsibilities.</p> <p>This course will provide practical examples of best practices to apply when making investment decisions. Topics will include setting interest rate expectations, identifying and comparing investment opportunities, and factors to consider when constructing your entity's investment portfolio.</p> |
| <p>Public Theft/Embezzlement</p> <p>Sara Costanzo (Donnersbach), Attorney/Shareholder, Weltman, Weinberg & Reis, Co. LPA</p> | <p>Participants will learn key signs to watch for, with suspected theft and/or embezzlement; participants will learn what charges/remedies exist when someone in public office steals from a public entity</p> <p>This course will highlight the variety and forms of embezzlement. Embezzlement is different from regular theft because the person who takes the money or property generally has trusted and legitimate access to the valuables before they take them for their own use. The objectives of this course include:1. Explore the differences between theft, embezzlement and types of embezzlement2. Describe the laws impacting embezzlement, at the state and federal levels3. Identify the warning signs or red flags of perpetrators</p> |
| <p>Leveraging technology and process to improve internal controls</p> <p>Tom Mitchell, President & CEO, Bonefish Systems, CLINT PELFREY, VICE PRESIDENT, BONEFISH SYSTEMS</p> | <p>Participants will learn:</p> <ul style="list-style-type: none"> A broader understanding of fraudulent activity in the government sector Steps that can be taken to enhance internal controls Ways to improve the overall efficiency in your finance department How technology can be utilized to reduce the risk of fraudulent activity in their organization <p>The Presentation will focus on ways you can utilize newer technologies to maximize efforts in preventing fraud within the organization. • Participants will gain insight into why fraud is so prominent within the government pace • Learn about various types of controls that can be implemented to greater reduce the risk of fraud• Steps you can take to minimize the risk of liability and protect Organizations funds • How technology can help support internal processes and gain insight into critical activities</p> |
| <p>The Next Frontier – Step Aside Jetsons, We Have a New Future Workplace</p> <p>Catherine F. Burgett, Member, Frost Todd Brown LLC</p> | <p>The workplace as we know it has changed. What does the modern workplace look like for you? This presentation will discuss managing a remote or hybrid workplace and best practices for addressing performance and discipline in these settings while mitigating risk associated with the new workplace. We will also examine the status of leave policies and how the related laws are likely to change in the aftermath of the COVID-19 pandemic. Learning Objectives1. Learn about the recent laws and anticipated legislation impacting the modern workforce.2. Discuss the practical issues in managing a remote and hybrid workforce and the suggested revisions to policies in light of the ever-changing workplace.3. Develop strategies for navigating the unknown as new issues arise and the workplace continues to evolve.</p> |
| <p>The Ohio Ethics Law: Building a Culture of Integrity</p> <p>Susan Willeke, Education & Communications Administrator, Ohio Ethics Commission</p> | <p>This lively session will help public finance professionals in understanding how to identify and avoid acting on potential conflicts of interest. It will also provide information regarding ethics prohibitions related to public contracts and potential post-employment requirements. Attendees will also learn about general assistance available from the Ohio Ethics Commission to assist treasurers (and the people who come to treasurers for help!) in understanding and complying with the Ethics Laws.</p> |

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| <p>Don't get caught up "S" Creek without an effective investment plan Ryan K. Nelson, CFA, Co-Founder/ Portfolio Manager, RedTree Investment Group</p> | <p>This session will be designed to educate Finance Officers in the fundamentals of investing funds under Ohio Revised Code Chapter 135. We will structure the panel discussion to provide knowledge and useful tools on how to build a successful investment program, regardless of the number of years in the profession or amount/size of funds available to invest. Incorporating fun themes from the popular TV show "Schitt's Creek", we will engage the audience by discussing in panel format topics such as: the latest ideas for investing under ORC 135, best practices of the Finance office to safeguard funds and other pertinent aspects such as depository contracts and AOS requirements. Included on the panel will be investment advisors, a Finance Director and a public fund banker. NOTE: It is not necessary to be familiar with the show in order to learn, participate and enjoy the session.</p> <p>The session will follow the mission of CPIM by providing investment knowledge to the attendees. The panel discussion will provide information and clarification on allowable investments under Ohio Revised Code Chapter 135 as well as insight on how to invest funds in today's challenging and low interest rate environment. Key tenets will focus on how to mitigate investment risk while maximizing returns. Participants can take the knowledge learned in a fun, but yet informative session back to respective entity to make prudent investment and bank related decisions.</p> |
| <p>GASB Roundtable Alyssa Kerker, Adjunct Professor, Franciscan University of Steubenville</p> | <p>The GASB Roundtable will provide an overview of the future GASB changes and participants will have the opportunity to discuss how they are implementing changes within their community's report.</p> <p>The GASB Roundtable will provide a brief overview of upcoming changes in reporting with GASB Statements. Being that most statements are phased in by the size of the entity, there will be some entities who have already started preparing for changes. Moving into groups will give the participants an opportunity to share implementation ideas led by bullet points of changes. Participants will see the overview of statements and then talk about the changes and implementation with the changes in schedules and workpapers prepared for financial reporting purposes.</p> |
| <p>From Relief to Recovery – How the Coronavirus State and Local Fiscal Recovery Funds Differ from Coronavirus Relief Funds Stacie Massey, State Accounting Manager 3, Ohio Office of Budget and Management</p> | <p>The Coronavirus State and Local Fiscal Recovery Funds has shifted the mindset of focusing on supporting the immediate needs of the pandemic to a more forward-looking approach for economic recovery. It is imperative that recipients understand this shift and work to develop a plan for thoughtful use of one-time funds for projects, while meeting the necessary compliance and reporting requirements. This session will discuss the requirements and eligible uses of the Coronavirus State and Local Fiscal Recovery Funds along with the differences from the Coronavirus Relief Funds from the CARES Act. In addition, the session will provide an overview on the various applicable sections of the Uniform Guidance to include best practices and tips for avoiding compliance pitfalls and navigating the requirements from the U.S. Treasury</p> |
| <p>Current cybersecurity and payment threats; Best practices and Insurance strategies to reduce risk Don Boian, Cybersecurity Outreach Director, Huntington Bank, Ashley Bauer, Marketing Manager, Commercial Lines, Huntington Insurance</p> | <p>Cyber security threats – Best practices and additional strategies to reduce risk including insurance awareness</p> |
| <p>Benefits of cloud computing Kevin Nye, Regional Account Manager, Software Solutions, Inc.</p> | <p>Cyber security is becoming a bigger issue for governments of all sizes and cloud computing is another option in the fight against this crime.</p> <p>This presentation will discuss some of the issues government entities are having with their on premise servers that house their data and what some of the benefits by moving to cloud based.</p> |

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| <p>Bond Issuance and Structuring Considerations in Today's Market</p> <p>Michael G. Sudsina, Managing Partner, Sudsina & Associates, LLC, Steve Szanto, Managing Director, Sudsina & Associates, LLC, Michael Prcela, Senior Vice President - Public Finance, Sudsina & Associates, Greg Van Wagnen, Senior Advisor, Sudsina & Associates, LLC</p> | <p>Participants will be presented with information regarding current conditions in the bond market that differ from traditional markets and how they should prepare to effectively enter the market with a debt issue.</p> <p>Participants should gain an understanding of the unique conditions that currently exist in the US public finance market and how they should work with their service providers to ensure the most advantageous debt offering for their public entity.</p> |
| <p>Your responsibilities as a fiduciary of a Governmental 457 Retirement Plan</p> <p>Scott Kimble, Team Leader, Wealth Management, Oswald Companies</p> | <p>Goal is to make clear your responsibilities as a fiduciary of a Deferred Compensation 457 Retirement Plan. Will answer questions such as:What State and Federal Laws apply to you?What is the standard of conduct?Who are your plan fiduciaries?What are best practices?How can you mitigate liability risk?</p> |
| <p>Check Security</p> <p>JULIE FLEISCHER, ACCOUNT EXECUTIVE, SAFEGUARD</p> | <p>New insights into check fraud and what you can do to protect your entity</p> <p>An in-depth look into different types of check fraud and how to combat it within your business. Learn about the different security features available with check documents and how you can better partner with your bank and printer to make sure you are protected. You will learn tips on how to recognize a bad check and what other documents you work with that may be at risk.</p> |