

OASBO Ohio Valley Chapter Meeting Course Description Quick Guide

Course Name	Course Description
Economic and Market Update Jennifer C. Trowbridge, CFA, Managing Principal & Portfolio Manager, RedTree Investment Group, Joe Violand, Portfolio Manager, RedTree Investment Group	<p>This course will cover economic and market updates. The course will provide information for decision makers on investing funds in today's markets. It will include a discussion on changes in the economic environment and its related changes in the fixed income markets. Statement of Accreditation Rationale: It is important for school business officials to remain in touch with current market trends as they make investment decisions.</p>
Cash, Sustainability, and the One-Time Funding Cliff Stacy Overly, Senior Analytics Advisor , Frontline Education	<p>During and in the aftermath of the pandemic many of the economic norms were stressed or absent. Many school districts found themselves with operational changes, whether it be revenue, or expenditures that changed their financial trajectory. In many cases districts ended could have experienced a positive financial trajectory when at the start of a pandemic the worst was expected. The result today can be a temporary, or transitional period where revenue exceeds expenditures most thanks to additional revenue such as federal stimulus or ESSER. During this financial transition learn how data can play a critical role in helping others understand financial results that are, well, hard-to-understand. This session will demonstrate the value of:</p> <ul style="list-style-type: none"> • Focused data analysis to determine key points • Pre and Post Pandemic financial results and explanation • Visualizations that help your stakeholders understand changes and impact • Forecast assumptions and the importance of a financial documentation/trail • Logical Messaging that is more than just numbers <p>Statement of Accreditation Rationale: Thorough understanding of a district's finances, including where they have been and where they are projected to go, is critical for any district CFO or decision maker. Having tools, resources and techniques to quickly get yourself up-to-speed when transitioning to a new district, or helping to communicate your district's state of finances, can be important for continuity of leadership and making the best financial decisions for a district.</p>