



**Ohio Association of Public Treasurers
Public Finance Officers Training Institute - June 5-9, 2023
Maintenance Program June 8-9, 2023
Kalahari Resort & Conference Center**



SUBMITTED for CPIM, FIA, CPE, CPFA, ACPFA and CLE

Sunday, June 4th Hotel Check-in

Monday, June 5, 2023

7:30-8 am **Registration & Breakfast
Welcome & Introductions**

8:00-10:00 am From Paper to Automation: The Past, Present, and Future of Payment Technologies
Bill Burke, Implementation Analyst, Software Solutions Inc.

10:00-10:15 am **Break**

10:15-12:15 pm Budgeting Basics
Lee Shortland, CPA, Director of Finance Director - City of Westerville

12:15-1:15 pm **Lunch**

1:15-3:15 pm Local Government Records: Retention, Disposition, and Electronic Records Considerations
Pari Swift, MLIS, CRM, University Records Manager, The Ohio State University

3:15-3:30 pm **Break**

3:30-4:30 pm Investments
Meeder Investment Management

6:00 - 8:00 pm **Networking Event at the Marrakesh - food and refreshments**

Tuesday, June 6, 2023

7:30-8 am **Breakfast**

8-10 am Debt Issuance/Capital Planning and the Star Trek (Kobayashi Maru).
Matt Stuczynski and Bill Logan, MAS Financial Advisory Services

10-10:15 am **Break**

10:15-12:15 pm Governmental Accounting
TBD

12:15-1:15 pm **Lunch**

1:15-3:15 pm Hot Topics in Human Resources
Catherine Burgett, Attorney at Law, Frost Brown Todd LLP

3:15-3:30 pm **Break**

3:30-4:30 pm Fiscal Officer Transition - Certificate of Transition
Tim Downing, Quality Assurance Tech Specialist Lead, AOS office

4:30-5:30 pm Fraud - TBD
AOS

Wednesday, June 7, 2023

- 7:30-8 am **Breakfast**
- 8-10:00 am Communications and Public Relations
Sara Costanzo, Shareholder/Attorney, Weltman, Weinberg & Reis, Co., LPA
- 10-10:15 am **Break**
- 10:15-12:15 pm Lead Like an Emperor: Leading Through Challenges and Overcoming Adversity
Tom Speaks, Partner and Co-founder, The Impact Group
- 12:15 pm **Open Afternoon, Join our Networking Event OR Enjoy Sandusky and the Lake Erie Shores!**

Thursday, June 8, 2023

- 7:30-8 am **Registration & Breakfast**
Welcome & Introductions
- 8-10 am Enhancing cybersecurity controls for local government financial, accounting, and human resources
Frank Antenucci, Chief Deputy Administrator for IT Services, Geauga County Auditor's Office
- 10-10:15 am **Break**
- 10:15-12:15 pm Public Finance
Rebecca Princehorn, Paul Rutter, Catherine Swartz, Partners at Bricker & Eckler LLP
- 12:15-1:15 pm **Lunch**
- 1:15-2:15 pm Investments
Meeder Investment Management
- 2:15-2:30 pm **Break**
- 2:30-4:30 pm It's Banking KAHOOT!
Huntington Bank, Maureen Shildwachter, Senior Vice President; Steve Broerman, Huntington Bank
Chase Bank, Joe Farris, VP Government Banking
- 6-7 pm **Reception**
- 7-9 pm **Awards Banquet**

Friday, June 9, 2023

- 7:30-8:30 am **Breakfast**
- 8:15-8:30 am **OAPT Workers Compensation Group Update, Scott Weisend, Sedgwick/CompManagement, Inc.**
- 8:30-10:30 am The Ohio Ethics Law 2023: To Be or Not to Be (Ethical)!
Susan Willeke, Ohio Ethics Commission, Training & Communications Manager
- 10:30-10:45 am **Break**
- 10:45 am - 1:00 pm Organizational Management
Andrew Esposito, Mgr. Client Dev., and Amanda Riess, Account Mgr. with Clemans, Nelson and Assoc.
- 11:45 am - 12:00 pm Break - Pick up boxed lunch for working lunch**