



# 2024 Spring Conference MAY 14-16

Time	Tuesday, May 14
10:00 – 11:00 am	<p><b>CTAO Legislative Update &amp; Government Primer</b> Join us as we kick-off our Spring Conference with this session presented by <b>Dan Talarek &amp; Alex Zumar</b>, Legislative Committee Co-Chairs, and a Capitol Square Update from CTAO Executive Director <b>Kevin Futryk</b> and State Lobbyist <b>Erin Glossop</b>. This session will include an overview of the Ohio General Assembly, the legislative process, the difference between the Ohio Revised Code and the Ohio Administrative Code, and the importance of grassroots advocacy by county treasurers on bills of importance to the CTAO. The advocacy work that we do in Columbus is important, but equally important is House &amp; Senate members hearing from their elected county treasurers on how public policy impacts their office operations.</p>
11:00 am – Noon	<p><b>Vexatious Public Records Request &amp; Proposed Solutions</b> Presenters: <b>Forrest Thompson</b>, Medina Co Prosecutor and <b>Lou Tobin</b>, Executive Director of Ohio Prosecuting Attorneys Association</p> <p>This session will educate treasurers on the status of public records access law and their duties under the law. It will also address current efforts to address issues in the law that create difficulties for all public officials who are responsible for responding to public record access. Presenters will also discuss some proposed changes to the Public Records Law the OPAA is seeking based on current events.</p>
1:00 – 1:30 pm	<p><b>Updates from Ohio Auditor Keith Faber</b></p>
2:00 – 3:00 pm	<p><b>Market Myths &amp; Treasury Truths</b> Presenters: <b>Jason Click</b>, President, Meeder Public Funds; and <b>Jim McCourt</b>, Director, Advisory Funds, Meeder Public Funds</p> <p>This session will discuss the County Tax Budget and Appropriation Process as primarily specified in ORC Chapter 5705. It will focus on the tax budget, waiver of the tax budget, and permanent and temporary appropriation resolutions. It will also focus on the role of the County Budget Commission including the issuance of certificates and amended certificates of available resources, and the roles of the County Auditor and County Treasurer in the process of adopting and managing permanent appropriation resolution after its adoption.</p>

**Hilton Polaris – 8700 Lyra Drive, Columbus, OH 43240**

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Tuesday, May 14 — continued	
3:30 – 4:30 pm	<p><b>Minimizing the Risk of Liability and Going Viral: Responding to First Amendment Auditors</b>            Presenter: <b>Benjamin Albrecht</b>, Attorney, Fishel Downey Albrecht &amp; Riepenhoff</p> <p>Visits to public employers by First Amendment Auditors are becoming more and more frequent. This session will review the rights and responsibilities of all parties when a First Amendment Auditor comes to your workplace. In addition to discussing cases outlining the rights of all parties, examples of First Amendment audits will be shown. Following a review of the video examples, the parties will discuss the effectiveness of the responses.</p>
5:30 – 8:30 pm	<p><b>Sunset Serenade: An Outdoor Jazz Reception</b>            Join us for an unforgettable evening! Enjoy the Hilton Polaris patio, delicious food, and drinks while mingling with friends &amp; colleagues. Let the Just Jazz Live trio serenade you into the sunset. Don't miss this music-filled night!</p>
Wednesday, May 15	
9:00 – 10:00 am	<p><b>Community Cybersecurity Preparedness Simulation – Part 1</b>            Presenter: <b>Natalie Sjelin</b>, Director of Training, CIAS, University of Texas San Antonio</p> <p>This presentation will explore a new National Cybersecurity Preparedness Consortium (NCPC) training opportunity designed to simulate a community-wide cyber security event. Using a gamification approach, participants will strategize with a diverse group of stakeholders to plan for and respond to a cybersecurity incident that could have cascading effects across a community. Our presenter will discuss organizational and community cybersecurity preparedness; budgeting &amp; planning considerations with limited resources; cascading effects a cyber-attack may have on a community; and strategies to prevent, detect, mitigate, respond to and recover from a cyber incident.</p>
10:00 – 10:15 am	<p><b>Updates from Ohio Treasurer Robert Sprague</b></p>



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**Wednesday, May 15 — continued**

10:30 – 11:30 am	<p><b>Community Cybersecurity Preparedness Simulation – Part 2</b></p> <p>Joining Ms. <b>Sjelin</b> for the second half of the session will be Lucas Co. Treasurer <b>Lindsay Webb</b>, Williams Co. Treasurer <b>Kellie Gray</b>, and Montgomery Co. Treasurer <b>John McManus</b>.</p> <p>The second half of this presentation will be an interactive session on what some counties have already done after a natural disaster (Montgomery Co) or man-made disaster (major power outage after main cut (Lucas Co), as well as what many counties are starting to do to prepare for cyber attacks, or update their current plans (Williams Co). As more and more county functions move to electronic means, it becomes imperative that every county treasurer’s office have a disaster preparedness plan in place.</p>
11:30 am – 1:00 pm	<p><b>District Meetings &amp; Lunch</b></p> <p>Districts have the opportunity to gather and discuss important issues in your area &amp; answer questions, if desired. You can go through the lunch buffet and eat together in your assigned meeting rooms.</p>
1:00 – 2:00 pm	<p><b>Tech Treasures: Boosting Collections with Paperless Payments</b></p> <p>Presenter: <b>Jason Powell</b>, Director of Implementations, Paylt</p> <p>The task of growing collections while maintaining fiscal responsibility for County Treasurers is increasingly challenging due to growing population demands, tightening budgets, and heightened scrutiny on expenditures. Recent technological advancements offer a solution, enabling County Treasurers to enhance their financial operations and collect revenue more efficiently. This session explores key technologies, including data analytics, digital payment platforms, and cloud-based tools, that are proven to save time and budget, making it easier to collect county revenues. Case studies from Jackson County, Beaufort County, and Shelby County’s successful collaboration with Paylt exemplifies these benefits. While challenges such as resistance to change and budget constraints exist, this abstract suggests concrete steps to embrace technology for streamlined collection processes, emphasizing the importance of collaboration with technology experts.</p>

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**Wednesday, May 15 — continued**

	<p><b>Wednesday, May 15 — continued</b></p>
<p>2:15 – 3:15 pm</p>	<p><b>Latest Trends in Fraud</b>          Presenter: <b>Onalee Arnold</b>, Fraud Protection Manager, Park National Bank</p> <p>With the ever-increasing use of electronic technologies in our everyday lives, especially with how we communicate (e-mail), how we interact with our financial institutions (ACH, e-check, EFTs), and issues of theft from the U.S. Mail Service, the potential for fraud or compromise of technologies is increasing. This presentation will focus on the current fraud trends: business e-mail compromise; mail fraud, stolen mail, check fraud; and digital fraud aspects, i.e., account takeover. Participants will learn how to ensure dual control, what technology enhancements they can adopt, fraud prevention tools, understand the latest fraud trends and how to spot them, and a working knowledge of current scam typologies.</p>
<p>3:30 – 4:30 pm</p>	<p><b>Affordable Housing Trust – What are they and how do you create one?</b>          Presenters: <b>Cheryl Brooks Sullivan</b>, Franklin Co. Treasurer and <b>Lark Mallory</b>, President &amp; CEO of the Affordable Housing Trust for Columbus &amp; Franklin Co.</p> <p>Affordable housing has been at the forefront of discussions by state &amp; local government in Ohio recently. The Ohio Senate created a Select Committee on Housing to study the problem and make recommendations. Counties continually work to put delinquent and abandoned properties back on the active property tax roles for the benefit of the county’s budget. A long-standing mechanism for providing affordable housing are Affordable Housing Trust Funds. Housing trust funds are distinct funds established by city, county, or state governments that receive ongoing dedicated public funding sources to support the preservation and production of affordable housing and increase opportunities for families and individuals to access decent, affordable homes. There are now 47 states with housing trust funds, and more than 765 city and county housing trust funds in operation. Participants will learn more about what Housing Trusts are, how they work, the benefits they provide to a county, how to establish a Housing Trust Fund, provide funding for it, and sustain it for the long-term benefits of a community.</p>
<p>5:00 pm</p>	<p><b>Buses Depart for Franklin Park Conservatory</b></p>
<p>5:30 – 8:30 pm</p>	<p><b>Franklin Park Conservatory &amp; Dinner</b>          Step into a world of natural wonder at the Franklin Park Conservatory and Botanical Gardens for an exclusive private dinner event. Join us for an evening of networking amidst the captivating beauty of the iconic John F. Wolfe Palm House, a historic gem from 1895. With after-hours access to the Conservatory, you’ll have the chance to explore the stunning grounds and indulge in a truly memorable experience. Don’t miss this unique opportunity to enjoy a delicious meal while immersing yourself in the enchantment of this renowned botanical garden.</p>



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**Thursday, May 16th**

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9:30 - 10:30 am	<p><b>Treasurer Roundtable Discussions</b> Treasurers will gather based on county population to discuss issues facing their offices and share advice and best practices with their peers &amp; colleagues. We will once again be offering the opportunity for similar sized counties to gather and discuss issues &amp; topics of concern. We'll provide some questions for all groups to discuss.</p> <p>Group 1 - 1-35,000 people Jeff McIntosh Group 2 - 35,001 - 55,000 Dave Wolters Group 3 - 55,001 - 95,000 Bill Ogg Group 4 - 95,001 - 200,000 John Burke Group 5 - 200,000+ Dan Talarek</p>
10:45 - 11:30 am	<p><b>Roundtable Recap</b> Regroup from your roundtable discussions to share what your group discussed and exchange ideas with your colleagues.</p>
11:30 am - 12:30 pm	<p><b>Grab &amp; Go (Or Stay!) Lunches</b> The Deli buffet will allow guests to build their own to-go box or eat your lunch with colleagues before you travel home.</p>

Save the Date: 2024 Fall Conference  
November 12 - 14, 2024  
at the Columbus Marriott Northwest in Dublin.

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