



2025 Fall Conference

NOVEMBER 12-14
HILTON POLARIS/COLUMBUS

Time	Wednesday, November 12
10:00 – 11:30 am	CTAO Legislative Update & Annual Business Meeting (1.5 Hr AOS) Join us as we kick-off our Fall Conference with this session presented by Brad Cromes, President; Dan Talarek & Alex Zumbar, Legislative Committee Co-Chairs; and a Capitol Square Update from CTAO Executive Director Kevin Futryk and State Lobbyist RJ Mancini. We'll also conduct the annual business of the CTAO & proposed bylaw updates.
1:00 – 2:00 pm	The View from the Other Side – An overview of the Duties & Responsibilities of the County Auditor, and their interactions with County Treasurers (1 hr AOS) This follow-up to our Fall 2024 "Treasurer 101" session examines the County Auditor's role, duties, and statutory responsibilities. Topics include financial oversight, property tax administration, county financial records, budget preparation, annual reports, and real estate appraisals. The session explores differences between auditor and treasurer offices, current collaboration, and opportunities for closer partnership. Panelists The panel will feature two former County Treasurers who are now County Auditors, Nancy Nix, Butler County Auditor, and Rachel Gilroy, Allen County Auditor, along with Union County Auditor Andrea Weaver, will present and answer questions.
2:15 – 3:15 pm	Resilience by Design: Public Funds Portfolio Strategies for Every Market Cycle (1 hr CPIM) Presenters: Eileen Stanic & Jim McCourt, Meeder Public Funds; Angie Maki-Cliff, Ashtabula Co. Treasurer; Kyle Ruddick, Clinton Co. Treasurer; and Dan Yemma, Mahoning Co. Treasurer This panel discussion, featuring experienced peers, will provide an engaging discussion for constructing resilient County portfolios across varying market conditions. Panelists will share insights on the critical role of investment policy as the foundation for portfolio planning, setting liquidity guidelines, the implications of maintaining excess liquidity, and the application of interest rate outlooks and breakeven analysis in portfolio design. This interactive session offers practical strategies from practitioners facing similar challenges, helping you balance safety, liquidity, and return while ensuring portfolios remain adaptable through changing economic environments.
3:30 – 4:30 pm	District Meetings Gather with treasurers and staff from your geographic region to discuss the issues facing your offices and communities.



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Wednesday, November 12 — continued

5:30 – 8:30 pm

Smash Park Westerville

Be among the first to visit a brand-new event venue, Smash Park! We'll have a private space for our dinner buffet, and plenty of time to check out all it offers – including duckpin bowling, pickleball, axe throwing, darts, arcade games, karaoke, and more! There's a little something for everyone, so don't miss out on the fun! The venue is less than two miles from the hotel.

8:30 – 10:30 pm

After-Hours Networking

Not ready to call it a night? The hotel restaurant and bar, 17 Arrows, will be open to our attendees for drinks and light snacks after our evening activities. Each attendee will receive three drink tokens each evening. Additional drinks are on your own tab.

Thursday, November 13

9:00 – 10:00 am

How To Get Your Substance Use Program, Workplace Violence Program and Training for FREE! (1 hr AOS)

Presenter: Scott Warrick, Scott Warrick HR Consulting & Employment Law Services

Discover how Ohio employers can access new state-funded programs in 2025 that fully reimburse organizations for substance abuse policies and training at no cost to your budget. This session will cover the application process, reimbursement procedures, and how recent medical and recreational marijuana legislation impacts workplace substance abuse programs.

10:15 - 11:15 am

Ohio Department of Taxation: An Overview of Their Role in Real Property Taxation in Ohio (1 hr AOS)

Property taxes have been front and center in legislative deliberations in Ohio for the past 3 years. Rising property values, which have led to skyrocketing property tax assessments, have caused over 3-dozen property tax reform bills to be introduced this year alone. In past conferences we have discussed this issue from several perspectives, but we've never had a session that looks at it from the perspective of the Ohio Department of Taxation. **Kelly Tennant**, Executive Administrator, Division of Tax Equalization, Ohio Department of Taxation, will do a deep-dive into the history of Ohio's real property tax, the role of the Tax Commissioner, the role of the Department of Tax Equalization (DTE), why they need to reappraise property's in Ohio, how it is done, and recent data trends from the department.



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Thursday, November 13 — continued

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11:30 am – 12:30 pm	Modern Disaster Recovery and AI-Driven Threats (1 hr CPIM) Presenters: Sam Collis, Philip Soeder and Greg Mullins, JP Morgan Chase As artificial intelligence accelerates the pace and complexity of cyber threats, understanding modern disaster recovery is essential. This session offers a clear look at emerging AI-driven risks, recent case studies, and practical strategies to safeguard your organization's critical operations. Gain valuable insights and actionable steps to strengthen resilience and ensure business continuity in today's evolving threat landscape.
1:30 – 2:30 pm	Understanding Land Banks and the Role They Serve in Your County (1 hr AOS) Ohio land banks, established through 2008 legislation, help counties acquire vacant and abandoned properties from tax foreclosure and redevelopment, returning them to tax rolls. Today, 71 of Ohio's 88 counties operate land banks serving urban, suburban, and rural areas. This session explores how land banks facilitate property reuse, the county treasurer's role in the process, and strategies for closer collaboration with land banks. Designed for the 24 new county treasurers and those in counties with newly formed land banks, presenters include David Mann, President & CEO, Lucas County Land Bank and Treasurer, Ohio Land Bank Association; Kathy Kelich, Belmont County Treasurer and OLBA Board Member, and Angie Maki-Cliff, Ashtabula County Treasurer.
2:45 – 3:45 pm	Getting Paid Sooner: Helping Residents Pay Before They Fall Behind Presenter: Joe Karras, Vice President, Public Sector, Paylt (1 hr CPIM) With limited staff and growing workloads, county treasurers are under pressure to collect delinquent taxes faster, without adding complexity for residents. This session explores practical strategies to improve collections and support taxpayers using tools many counties already have access to. We'll cover small updates to communications, payment options, and outreach timelines that lead to better results. Treasurers will leave with a checklist they can use right away to boost recovery rates, no new systems or IT support needed.
4:00 – 4:45 pm	New Treasurer Meet & Greet with Vendors Our vendor partners will have the opportunity to meet and mingle with the 24+ new treasurers in a private reception prior to the start of the Vendor-Member mingle.
5:00 – 6:00 pm	Vendor-Member Reception Our cocktail reception will be held in our vendor exhibit hall, allowing treasurers and staff to have more time to learn about the products and services of our exhibiting vendor partners.



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Thursday, November 13 — continued

6:00 – 7:30 pm	President's Banquet & Leadership Installation Dinner Join us for a delicious dinner as we say thank you to Brad Cromes for his service as CTAO Board President and swear in our new officers, including incoming President Kathy Kelich . Vendors are welcome to attend this dinner & network with treasurers throughout the evening.
7:30 – 9:00 pm	Evening Activities More info coming soon!
9:00 – 11:00 pm	After-Hours Networking Not ready to call it a night? The hotel restaurant and bar, <u>17 Arrows</u> , will be open to our attendees for drinks and light snacks after our evening activities. Each attendee will receive three drink tokens each evening. Additional drinks are on your own tab.

Friday, November 14

8:30 – 9:15 am	Breakfast & Treasurer Roundtable Discussions (.75 hrs AOS) Treasurers will gather based on county population to discuss issues facing their offices and share advice and best practices with their peers & colleagues. We will once again be offering the opportunity for similar-sized counties to gather and discuss issues & topics of concern. We'll provide some questions for all groups to discuss. Group 1 – 1-35,000 people Group 2 – 35,001 – 55,000 Group 3 – 55,001 – 95,000 Group 4 – 95,001 – 200,000 Group 5 – 200,000+
9:30 – 10:15 am	Roundtable Recap (.75 hrs AOS) We'll gather back as a large group to discuss the key take-aways from each of the small groups and continue the discussion. Each roundtable will have a spokesperson to share what they learned with the larger group. There will also be time for Q&A.