



Business Administration, Finance, and Levy Campaigns

October 15

9:00 a.m. - 4:30 p.m.

Overview: The AM session will focus on essential financial and administrative concepts that are important for a public sector executive. The starting point is the budgeting process, which assures that sufficient resources are in place for the execution of organizational plans. Next, the session will explore non-tax levy revenue sources (federal, state and local) and related compliance requirements. The third segment of the discussion will be on non-payroll expenditures, including capital planning, procurement, and payment. Throughout the session, relevant internal control procedures, or “checks and balances” will be highlighted. The session will conclude with a summary of financial reporting and auditing processes that provide sustainability for the long term.

The PM session will focus on conducting successful levy campaigns. Jed Morison will provide insights on the three phases of levy planning; The Ongoing Levy Campaign, The Behind the Scenes Campaign and The Public Campaign. Levy timelines and strategies will be discussed and materials that have been successfully used in campaigns will be shared. He will also share his Top Ten Ways to Pass a Levy. While this session will not offer legal advice, strategies to utilize on an ongoing basis will provide helpful insights to the participants.

Presenters:

Jed Morison, Superintendent, Franklin County Board of DD; Dot Yeager, CFO, Franklin County Board of DD

Guardianship, Due Process and HIPAA

October 16

8:30 a.m. - 4:00 p.m.

Overview: Frank Hickman will provide an overview of Guardianship by reviewing basic requirements of guardianship and considerations on managing issues arising from guardianships including implications of the Spangler decision. He will also provide information on due process procedures and review the basic appeal requirements under Medicaid and DD Board rules. He will explain how concurrent appeals are handled and how an appeal relates to subsequent court proceedings. An overview of basic privacy rights in Ohio under HIPAA will be provided and will include implications of recent changes made under H.B. 153.

Presenter:

Frank Hickman Esq., Senior Partner, Hickman & Lowder Co. L.P.A., Cleveland, Ohio



To find out more, contact Kim Linkinhoker (klinkinhoker@oacbdd.org) or Ann Neu (aneu@oacbdd.org) at (614) 431-0616 for information.

