



# POLICY MANUAL



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## **I. GOVERNANCE**

### **A. Communications**

Any communications on behalf of Ohio GFOA shall be official, at the direction of the president, board or staff. No statements shall be made on behalf of the association, either verbal or written that conflict with the position or policy of the association. To control official communications, stationary and logo use shall be for the use of the elected officers and staff only. Staff will prepare correspondence sent on behalf of the organization with a copy remaining in the office. Copies of correspondence prepared by elected officers and placed on association stationary or with Ohio GFOA logo will be kept on file in the association office, in accordance with the Ohio GFOA document record retention and destruction policy. Exceptions may be made to the policy so long as the purpose of the letter is made known and approved by the board in advance; if the exception is approved, a copy of the outgoing communication shall be provided to staff within 24 hours of dissemination, for retention, in accordance with the Ohio GFOA document record retention and destruction policy.

### **B. Meeting Minutes**

Minutes shall be taken for all Ohio GFOA Officers, Board of Trustee and Committee meetings and forwarded to the Ohio GFOA office to be kept on file in the Ohio GFOA office in accordance with the Ohio GFOA document record retention and destruction policy.

### **C. Conflict of Interest**

This Conflict of Interest Policy of Ohio GFOA: (1) defines conflicts of interest; (2) identifies classes of individuals within Ohio GFOA covered by this policy; (3) facilitates disclosure of information that may help identify conflicts of interest; and (4) specifies procedures to be followed in managing conflicts of interest.

1. **Definition of conflicts of interest.** A conflict of interest arises when a person in a position of authority over Ohio GFOA may benefit financially from a decision he or she could make in that capacity, including indirect benefits such as to family members or businesses with which the person is closely associated. This policy is focused upon material financial interest of, or benefit to, such persons.
2. **Individuals covered.** Persons covered by this policy are Ohio GFOA's: (1) officers; (2) trustees; and (3) Executive Director.
3. **Facilitation of disclosure.** Persons covered by this policy will annually disclose or update to the President of Ohio GFOA (except for the President who shall disclose to the President-elect) on a form provided by Ohio GFOA their interests that could give rise to conflicts of interest, such as a list of family members, substantial business or investment holdings, and other transactions or affiliations with businesses and other organizations or those of family members.
4. **Procedures to manage conflicts.** For each interest disclosed to the President of Ohio GFOA (or to the President-elect, in the case of the President), the President will determine whether to: (a) take no action; (b) assure full disclosure to the Board of Trustees and other individuals covered by this policy; (c) ask the person to recuse from participation in related discussions or decisions within Ohio GFOA; or (d) ask the person to resign from his or her position in Ohio GFOA or, if the person refuses to resign, become subject to possible removal in accordance with Ohio GFOA's removal procedures. The Ohio GFOA Board of Trustees and Executive Director

will monitor proposed or ongoing transactions for conflicts of interest and disclose them to the President of Ohio GFOA in order to deal with potential or actual conflicts, whether discovered before or after the transaction has occurred.

The Annual Reporting Statement shall be completed by the Board of Trustees, annually.

#### **D. Officers & Board of Trustees**

The order of leadership succession for the Ohio GFOA officer positions shall be: President-elect, President, Immediate Past President.

Officers and Board of Trustees members must be active members of Ohio GFOA.

Committee chairs and co-chairs must be active members of Ohio GFOA.

The GFOA Representative, unless the GFOA Representative is a current Trustee, shall be an ex-officio member of the Board without the right to vote on matters before the Board. The GFOA Representative shall also be the Ohio GFOA representative to the GFOA Mid-America group.

The Auditor of the State of Ohio and the Treasurer of the State of Ohio, or his or her designated representative, unless that officer or representative is a current Trustee, shall be ex-officio members of the Board without the right to vote on matters before the Board.

Any member who is not a current Trustee appointed as Chair of the Education Committee, shall be an ex-officio member of the Board without the right to vote on matters before the Board.

## **II. FINANCES**

### **A. Audit/Financial Review**

Ohio GFOA shall conduct a full audit every year. An Audit Committee consisting of the current treasurer and immediate past president shall meet with the accounting firm handling the Ohio GFOA audit and 990 filing and address any concerns and/or questions that may arise from either party.

### **B. Budgetary Compliance Policy**

Policy: It is the policy of the board of trustees of the Ohio GFOA to maintain a reasonable level of budgetary control sufficient to ensure adherence to the budget as outlined below.

Level of Control: The level of budgetary control will be Total Expenditures.

Tolerance: Total Expenditures may exceed the budget by no more than 2%. Build into the overall operating budget a 10% (calculated at 10% of expenditures) contingency line item. When the treasurer determines that this limit may be exceeded, he/she shall bring the matter to the attention of the executive committee. The executive committee may initiate corrective action to keep expenditures within the specified limit or may offer a budget amendment for consideration by the board of trustees.

Monitoring: It shall be the responsibility of the committee chairpersons and the executive director to monitor their respective budgets. Such persons shall report any anticipated material budget overspending to the treasurer.

Compliance with Fund Balance Reserve Policy: The board of trustees shall not adopt a budget that would cause a breach of the minimum fund balance specified by the Fund Balance Reserve Policy.

### **C. Reserve “Rainy-Day” Fund Balance Policy**

A reserve balance (“rainy-day”) fund shall be established to provide the required funding of the organization in the event of an economic downturn or other event that would materially negatively impact the financial condition of the organization. The annual amount of the fund shall be set at the time the annual budget is adopted by the Board and shall be set at a level equal to the total of all non-annual conference or training seminar expenses.

### **D. Financial Goals for Seminars Policy**

The mission of the Ohio GFOA is “Shared knowledge for effective government”. The organization works to meet this exchange of information by providing educational and networking opportunities. The Education Committee is charged with providing educational opportunities within the budget established by the Board of Trustees.

### **E. Investment Policy**

Any transfer of funds into or out of the investment accounts must have the approval of the Ohio GFOA Treasurer. Notice shall be given to the Board as soon as practicable, after said transfer.

An annual investment report shall be prepared and presented to the Board of Trustees within 90 days of fiscal year-end.

### **F. Expense Reimbursements**

1. **GFOA Annual Conference**  
Ohio GFOA will pay the registration fee and travel expenses of the Ohio GFOA President, State Representative, Education Committee Chair, and the Executive Director, to participate in the National GFOA Annual Conference.
2. **Certificate of Achievement for Excellence in Financial Reporting (COA) Presentations**  
When making COA presentations, Ohio GFOA will pay mileage expenses at the current IRS rate for the State Representative or a board member, if the State Representative is unavailable.

### **G. Donations/Contributions**

Donations, on behalf of Ohio GFOA, can only be made within Ohio and must be approved by the Ohio GFOA Board of Trustees.

Charitable contributions, on behalf of Ohio GFOA, can be made through a scholarship, as designated by the Ohio GFOA Board of Trustees.

### **III. COMMITTEES**

#### **A. Committee Structure**

Ohio GFOA shall have three (3) standing board committees: Executive Committee, Nominating Committee and Education Committee.

1. **Executive Committee**, to include: President, President-elect, Secretary, Treasurer and Immediate Past President.
2. **Nominating Committee**, to include: Immediate Past President and four other prior Presidents selected by the Immediate Past President. The Immediate Past President shall chair the Nominating Committee, and the members of the Nominating Committee may elect any member of the Nominating Committee to serve as its secretary.
3. **Education Committee**, to include: Chair and such other Trustees and Members who volunteer to serve on the Education Committee. The Education Committee may elect any member of the Education Committee to serve as its secretary. The Education Committee shall have such duties as may be designated by the President or prescribed by the Board.

Other Committees include: Awards, Early Career Professionals, Legislative, Membership, Scholarship, Social, Social Media and Sponsorship. Each committee chair is appointed by the President. Committees should meet, at a minimum, quarterly to work towards pre-set committee goals. The Committee Chair provides a written report at each Board Meeting.

**Awards Committee** – Actively promote Ohio GFOA award offerings and create newly potential offerings for the Board’s consideration and acceptance. Contribute to the website and newsletter.

**Early Career Professionals Committee** – Any Ohio GFOA member who has either 10 or fewer years of experience in a governmental finance position or related field or is less than 40 years of age. This committee is designed to develop a community for new members/young professionals to network and gain educational opportunities.

**Legislative Committee** - Promote awareness of legislative issues that impact the financial reporting of member entities. Contribute to the website and newsletter.

**Membership Committee** – Recruit and retain members is the goal! Plan social activities for members and new members. Assist with membership drives and help identify the best resources for membership. Contribute to the website and newsletter.

**Scholarship Committee** – Actively promote Ohio GFOA scholarship offerings which includes the National GFOA Advanced Institute.

**Social Committee** – Implement new ideas to share with the Education Committee and Board for the Welcome Reception entertainment at the Annual Conference and Membership Meeting and various seminar offerings throughout the year. Contribute to the website and newsletter.

**Sponsorship Committee** – Sponsors provide the means in which we can continue our education to our membership. Actively search for new sponsors and retain existing sponsors.

## **IV. EDUCATION**

### **A. Annual Conference and Membership Meeting**

Ohio GFOA will offer one annual meeting, per year, to be held in the Fall. Location of the meetings shall rotate between Columbus, Cleveland and Cincinnati, or at such other location as the Ohio GFOA Board and Education Committee shall set.

Ohio GFOA will pick up room and tax only for board members coming in from out of town the night before to attend the board meeting.

The Ohio GFOA President and Education Committee Chair may receive up to three (3) nights hotel accommodations and parking expense at the Annual Conference and Membership Meeting.

Complimentary registration to the Annual Conference and Membership Meeting will be provided to the Ohio GFOA President, Ohio GFOA Education Committee Chair, speakers and moderators.

Annual Conference and Membership Meeting handouts will be provided to attendees, electronically, in advance of the meeting and placed on the members-only side of the website following the conference.

### **B. Seminars**

Ohio GFOA will offer various training as designated by the Education Committee throughout the state.

Seminar materials will be distributed onsite and placed on the members-only side of the website following the seminar.

Complimentary registration to seminars will be provided to the Ohio GFOA President, Ohio GFOA Education Committee Chair, Program Chair and speakers.

Ohio GFOA doesn't allow distribution of meeting materials to others for the purpose of teaching their own class.

### **C. Compensation**

Two-Day Seminars – Board and non-board members teaching a two-day seminar shall be offered a flat fee of \$750 per instructor. Complimentary overnight accommodations and meals will be provided.

Anyone employed by a governmental agency that cannot accept the compensation shall receive a complimentary voucher to attend the Ohio GFOA Annual Conference and Membership Meeting to be used as the discretion of the agency.

Rewriting Seminar Materials – Board and non-board members may be offered a compensation amount of \$50/hour up to 30 hours for a maximum of \$1,500. Any additional time spent shall be brought forward to the board for consideration.

### **D. Partnerships**

Mid-America GFOA – A 10-state parameter to include: Ohio, Illinois, Minnesota, Missouri, Michigan, Wisconsin, Kentucky, Iowa, Indiana and Tennessee. The purpose is to forge new partnerships. Goals for

this partnership include:

1. Education – Develop a training partnership and deliver via video-conferencing.
2. Communication – Facilitate ideas amongst the states and membership (i.e., LinkedIn).
3. Professional Development – Form a consulting group of retired finance officers to be utilized as mentors for new and upcoming finance officers.

Treasurer of State - Ohio GFOA has partnered with the Treasurer of State's Center for Public Investment Management (CPIM) to offer accreditation for the Ohio GFOA Annual Conference and Membership Meeting and Ohio GFOA seminars, when applicable.

Auditor of State – Ohio GFOA has partnered with the Auditor of State's Fiscal Integrity Act (FIA) to offer accreditation for the Ohio GFOA Annual Conference and Membership Meeting and Ohio GFOA seminars, when applicable.

## **V. ENDORSEMENTS**

### **A. Legislative**

The Legislative Committee regularly reports to the Board legislative initiatives and/or issues that impact financial reporting. Periodically, issues warrant additional attention and/or action for which the Board is asked to consider supporting. While Ohio GFOA is an educational organization rather than a lobbying organization, the Board may choose to show support and/or opposition in the way of a Resolution and/or keep members alerted to activities of interest by providing a newsletter article and/or send out a listserv to include a direct link to the bills/summaries.

### **B. Vendors**

Periodically, the Ohio Government Finance Officers Association (Ohio GFOA) is asked to endorse and/or partner with a vendor. It is Ohio GFOA's policy not to take a position in endorsing vendors but to encourage them to become a sponsor and/or vendor to promote their product.

## **VI. OTHER ORGANIZATIONS**

### **A. Promotion of Events for other Organizations**

Any promotion of outside organization events must have the approval of the Ohio GFOA Board. Approved events shall be promoted via the Ohio GFOA website.

### **B. Distribution of Ohio GFOA Membership List**

The Ohio GFOA membership list will not be given to any outside organization or non-member without the approval of the Ohio GFOA Board.

## **VII. MEMBERSHIP**

The membership dues period runs January 1-December 31.

### **A. Retired Officers/Board Members**

Complimentary lifetime membership shall be given to retired board members along with a 25% discount towards conferences and services.



## **B. Public Universities**

Membership shall be granted to both two (2) and four (4) year public universities as they follow the GASB standards.

## **VIII. AWARDS**

The Awards Committee will solicit nominations for Ohio GFOA awards, annually. The Awards Committee will present nominations to the Ohio GFOA Board of Trustees who will select the award recipients. Ohio GFOA awards will be distributed during the awards luncheon at the Ohio GFOA Annual Conference and Membership Meeting. Selected award recipients are invited to attend the luncheon at no cost.

## **IX. INSURANCE**

### **A. Directors and Officers Insurance**

Ohio GFOA shall carry directors and officers insurance. The policy is to be approved by the Ohio GFOA Board of Trustees.

### **B. General Liability Insurance**

Ohio GFOA shall carry general liability insurance. The policy is to be approved by the Ohio GFOA Board of Trustees.

## **X. ADMINISTRATION**

### **A. Whistleblower Policy**

Ohio GFOA's Whistleblower Policy: (1) encourages staff and volunteers to come forward with credible information on illegal practices or serious violations of adopted policies of the association; (2) specifies that the association will protect the person from retaliation; and (3) identifies where such information can be reported.

1. **Encouragement of reporting.** Ohio GFOA encourages complaints, reports or inquiries about illegal practices or serious violations of the association's policies, including illegal or improper conduct by the association itself, by its leadership, or by others on its behalf. Appropriate subjects to raise under this policy would include financial improprieties, accounting or audit matters, ethical violations, or other similar illegal or improper practices or policies.
2. **Protection from retaliation.** Ohio GFOA prohibits retaliation by or on behalf of the association against staff or volunteers for making good faith complaints, reports or inquiries under this policy or for participating in a review or investigation under this policy. This protection extends to those whose allegations are made in good faith but prove to be mistaken. Ohio GFOA reserves the right to discipline or take other action against persons who make bad faith, knowingly false, or vexatious complaints, reports or inquiries or who otherwise abuse this policy.

3. **Where to report.** Complaints, reports or inquiries may be made under this policy on a confidential or anonymous basis. They should describe in detail the specific facts demonstrating the bases for the complaints, reports or inquiries. They should be directed to Ohio GFOA’s President or Executive Director; if both of those persons are implicated in the complaint, report or inquiry, it should be directed to any officer of the association. Ohio GFOA will conduct a prompt, discreet and objective review or investigation. Staff or volunteers must recognize that the association may be unable to fully evaluate a vague or general complaint, report or inquiry that is made anonymously.

**B. Document Record Retention & Destruction**

This policy sets forth Ohio GFOA's Document Retention and Destruction Policy. Compliance with this policy is mandatory for Ohio GFOA staff, members of the Board and Committee Chairs.

1. **General Rules**

Records should not be kept if they are no longer needed for the operation of Ohio GFOA or required by law. The cost of maintaining records is an expense which can grow unreasonably and a mass of records also makes it more difficult to find pertinent records.

Several categories of documents that warrant special consideration are identified below.

The original or a hard or electronic copy of the original should be maintained for the time period indicated. Unless special circumstances otherwise require, it is NOT useful to maintain draft documents or multiple copies of the same document.

Electronic records that need to be retained should be either printed in hard copy and kept in the appropriate file or downloaded to a computer file and kept electronically or on disk as a separate file. Electronic files should be backed up daily and stored off-site in a fireproof safety box. The retention period depends upon the subject matter as covered elsewhere in this policy.

2. **Minimum Period for Certain Categories of Records:**

<u>Category</u>		<u>Retention Period</u>
Accounts payable ledgers and schedules		7 years
Accounts receivable ledgers and schedules		7 years
Audit reports and financial statements of accounts		Permanently
Bank reconciliations		2 years
Cash books		Permanently
Chart of accounts		Permanently
Checks (canceled)		7 years
Continuing Legal Education Records		4 years

Contracts and leases (expired)		7 years
Correspondence (general); Correspondence (routine) with members, customers, or vendors		1 year
Correspondence (legal and important matters only)		Permanently
Depreciation schedules		Permanently
Duplicate deposit slips		2 years
Expense analysis and expense distribution schedules		7 years
Financial Statements (end of year, other months optional)		Permanently
Insurance policies (expired)		Permanently
Insurance records (other than policies), current accident reports, claims, etc.		Permanently
Internal financial statements and reports		7 years
Invoices to members and customers		7 years
Invoices from vendors		7 years
Journals		Permanently
Membership applications		3 years
Minutes of directors, officers and committees, including bylaws and charter		Permanently
Notes receivable ledgers and schedules		7 years
Petty cash vouchers		3 years
Tax returns and worksheets; revenue agents' reports and other documents relating to determination of income tax liability		Permanently
Voucher register and schedules		7 years
Vouchers for payments to vendors, employees, etc. (Includes: allowances and reimbursement of employees, officers, etc., for travel and entertainment expenses)		7 years

### 3. **Special Circumstances**

Certain events (such as the receipt of a subpoena or the commencement of a government investigation or claims made by or against Ohio GFOA) may require the retention of records and the suspension of any destruction of certain categories of documents. In those circumstances, the Executive Director, the President, or the Board of Trustees will notify the appropriate individuals of a DOCUMENT RETENTION HOLD, identifying the specific categories of documents to be retained until further notice. Those documents must be retained at least until the DOCUMENT RETENTION HOLD is lifted, regardless of the time periods set forth in Section 2 above.

### **C. Sexual Harassment Policy**

The Ohio Government Finance Officers Association (“Ohio GFOA”) is committed to maintaining a professional work environment in which all individuals are treated with respect and dignity and will not tolerate conduct by any staff member or volunteer that harasses another staff member or volunteer, disrupts or interferes with another staff member or volunteer’s work performance, discriminates based upon a protected characteristics, or creates an intimidating, offensive, or hostile environment.

Each individual has the right to work or serve in a professional atmosphere that promotes equal opportunities and prohibits discriminatory practices, including harassment. This policy applies to staff, volunteers, board members, committee members, and others on Ohio GFOA property or at Ohio GFOA-sponsored events. Prohibited harassment may take many forms, but the most common forms include:

- Verbal harassment – such as epithets/labels, derogatory statements, slurs, jokes or teasing about another person’s protected status;
- Physical harassment – such as physical interference with normal work, impeding or blocking movement, assault, unwelcome physical contact, leering at a person’s body, and threatening, intimidating, or hostile acts that relate to a protected characteristic;
- Visual harassment – such as posters, cartoons, drawings or other images that are considered to contribute to an offensive or hostile working environment.

Ohio GFOA prohibits behavior which (1) has the purpose or effect of creating an intimidating, hostile or offensive work environment, (2) has the purpose or effect of unreasonably interfering with an individual’s work performance, or (3) otherwise adversely affects an individual’s employment opportunities. Ohio GFOA prohibits not only unlawful harassment, but also other unprofessional and discourteous actions relating to any characteristic protected by applicable law. Accordingly, derogatory racial, ethnic, religious, age, sexual orientation, sexual or other inappropriate written or oral remarks, slurs, stereotyping or jokes will not be tolerated.

Sexual harassment (harassment on the basis of sex or gender) is strictly prohibited. Examples of prohibited behavior include unwelcome sexual advances, requests for sexual favors, obscene gestures, displaying sexually graphic magazines, calendars or posters, sending sexually explicit e-mails, text messages and other verbal or physical conduct of a sexual nature, such as uninvited touching of a sexual nature or sexually

related comments. Depending upon the circumstances, improper conduct also can include sexual joking, vulgar or offensive conversation or jokes, commenting about an employee's physical appearance, conversation about your own or someone else's sex life, or teasing or other conduct directed toward a person because of his or her gender which is sufficiently severe or pervasive to create an unprofessional and hostile working environment.

Sexual harassment includes harassment of women by men, of men by women, and same-sex harassment. Sexual harassment is unlawful whether it involves co-worker harassment, harassment by a supervisor or manager, or by persons doing business with or for Ohio GFOA. Any sexually harassing or offensive conduct is unacceptable in the workplace itself and by any owner, partner, or employee in any business-related setting outside the workplace, including but not limited to other work-related settings such as business trips, sales calls, service calls, and business-related social events.

### **Reporting Violations**

If you believe you have been subject to or witnessed a violation of this policy, as a first step, and only if you feel comfortable, you may address the issue directly with the offender. If you are not comfortable addressing the issue with the offender directly, or if the situation is not resolved, you are required to immediately report the incident to the Officers of Ohio GFOA. Staff members are required to immediately report all complaints of violations of this policy to the Officers of Ohio GFOA.

Reports of violations or perceived violations of this policy will be promptly investigated and corrective action will be taken where appropriate. Failure to cooperate in any investigation may lead to disciplinary action, up to and including immediate termination of employment. Confidentiality will be maintained throughout the investigatory process to the extent practical and appropriate under the circumstances, or as required by law. Retaliation against any employee for filing a complaint or participating in an investigation is strictly prohibited; acts of retaliation should be reported in the same manner as other violations of this policy.

Any staff member who is found to have violated this policy will be subject to disciplinary action up to and including discharge. If an investigation results in a finding that the reporting individual falsely and maliciously accused another of a violation of this policy, the reporting individual may be subject to disciplinary action up to and including discharge.

Any staff member who believes that (s)he has been harassed or who believes (s)he has witnessed prohibited harassment must follow these procedures.

*Approved 3.16.18*

### **D. Code of Ethics**

We, the government finance officers of the United States and Canada, have a deep and abiding desire to show that we are worthy of the special trust that the communities we serve have placed in us. As a member of my government's finance office, I commit to living the following values to show that I am worthy of that trust.

#### **INTEGRITY AND HONESTY**

Integrity and honesty are the foundation on which trustworthiness is built. It means people can believe what I say, I act in accordance with my deepest values, I put principle ahead of my own ego, and I do the right thing even when it is hard.

### **PRODUCING RESULTS FOR MY COMMUNITY**

Public finance offices have an important job. Doing that job well honors the trust the public has placed in me.

### **TREATING PEOPLE FAIRLY**

Local governments depend on trusting relationships. Therefore, I will treat people fairly and develop processes and procedures that are fair.

### **DIVERSITY AND INCLUSION**

Embracing diversity and fostering inclusiveness helps finance offices cultivate organizations and promote policies that reflect the communities they serve. When people feel included, they see that I am concerned for their wellbeing. That shows I am worthy of their trust.

### **RELIABILITY AND CONSISTENCY**

When I consistently apply my standards – especially to myself – I honor my commitment to the community I serve and make it easier to do the right thing even when faced with challenging circumstances.

*Adopted by the membership on 9.19.19*

*Updated 1.31.2023*