



AGENDA

CALL TO ORDER – 10:30 a.m.

PLEDGE OF ALLEGIANCE – Amie Lynn

SECRETARY’S REPORT – Ami Mayne

- Approval of September 16, 2025 Meeting Minutes

PRESIDENT'S REPORT – Amie Lynn

- 2026 Board & Education Committee Meetings - Calendar / Locations
- 2026 State Representative Appointment – Stacey Russell
- Discussion of Committee Roles and Functionality Facilitated Under “Committee Discussion Items” (below)

TREASURER’S REPORT – Jared Cottrell

- October 2025 Financial Statements

EXECUTIVE DIRECTOR’S REPORT – Nancy Waterhouse

- Annual Conflict of Interest Acknowledgment
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COMMITTEE REPORTS

1. **State GFOA Representative** – Stacey Russell
 2. **Nominating Committee** – Jessica Marquez
 3. **Communications Committee** – Danny Sklenicka / Mollie Gilbride
 4. **Sponsorship Committee** – Megan Miller / Gina Love
 - Review 2026 Sponsorship Opportunities
 5. **Education Committee** – Stacey Russell / Jeff McCuen
-

COMMITTEE DISCUSSION ITEMS

6. **Membership Committee** – Kyle Smith / Jim Boehmer / Justin Nahvi
 - Consider expanding committee role in 2026 (recruitment incentives, networking opportunities, etc.)
 - Board discussion of ideas to implement for membership expansion
7. **Scholarship Committee** – Ami Mayne / Joey Jones
 - Revisit governmental institution member scholarship
 - Evaluate current scholarship offerings – consider restructure

8. Awards Committee

- Consider board vote to dissolve committee
- Board currently votes on submissions – no change proposed to this protocol
- Discuss forming an ad-hoc committee to review and update award structure

9. Social Committee

- Consider board vote to dissolve committee (previously responsible for golf outing)
- Executive Director and her team do most planning with input from current President and Board members local to upcoming conference, when appropriate

OLD BUSINESS

NEW BUSINESS

- 2026 New Board Member Committee Appointments – Jennifer Widmer, Sandra Lodge, Jennifer Hartley

ANNOUNCEMENTS

ADJOURNMENT

Supporting Our Members Through Collaborative, Innovative, and Inclusive Public Finance Education and Networking.

OHIO GFOA BOARD MEETING MINUTES

September 16, 2025

Hilton Columbus at Easton – Magnolia Room

PARTICIPANTS

Jessica Marquez, Amie Lynn, Ami Mayne, Jared Cottrell, Bethany Staats, Stacey Russell, Andrew Yogmour, Mollie Gilbride, Brent Lewis, Gina Love, Megan Miller, Julie Adkins, Vicki Barger, Jill Davidson, Justin Nahvi, Brian Cooper, Adam Lesch, Danny Sklenicka, Adam Collier, Lori Starcher, Joey Jones, Ashley Perry, Jim Boehmer, Sandra Lodge, Shawn Hufstedler, Jennifer Howland, Jennifer Hartley, Jennifer Widmer, Heather Baldwin Vlasuk, Nancy Waterhouse and Kayla O'Shelski

CALL TO ORDER

President Jessica Marquez called the meeting of the Ohio GFOA Board to order on Tuesday, September 16, 2025, at 6:03 p.m.

PLEDGE OF ALLEGIANCE

SECRETARY'S REPORT – Ami Mayne

Motion, Seconded and Approved: To accept the May 16, 2025 meeting minutes, as presented.

PRESIDENT'S REPORT- Jessica Marquez

Introduced and welcomed newly elected Trustees. While their first official board meeting will be in November, we're happy to have them join us today as guests.

Extended sincere appreciation to outgoing Trustees, who will be presented with a Distinguished Service Award Plaque at Wednesday's luncheon in recognition of their leadership, dedication, and service to the organization.

TREASURER'S REPORT – Jared Cottrell

Reviewed the August 2025 preliminary financials. Provided brief history on investments for the new members. *Motion, Seconded and Approved:* To accept the August 2025 financials, as presented.

Drafts of the 2024 Audit and Form 990 were distributed. *Motion, Seconded and Approved:* To accept the 2024 drafted Audit and Form 990, as presented.

EXECUTIVE DIRECTOR'S REPORT – Nancy Waterhouse

A written report was submitted, noting that the registration count has since increased to over 460.

COMMITTEE REPORTS

State Representative – Stacey Russell

A written report was submitted.

Nominating – Bethany Staats

A written report was submitted.

Sponsorship – Megan Miller/Adam Lesch/Gina Love

A written report was submitted.

Membership – Kyle Smith/Brent Lewis/Jim Boehmer/Justin Nahvi

A written report was submitted.

Education – Jeff McCuen/Stacey Russell

A written report was submitted.

Communications – Danny Sklenicka/Mollie Gilbride

The group will continue meeting monthly to plan LinkedIn posts. Board members were asked to take photos during the conference for posting. Bethany Staats will ask the New Albany communications team to take photos at the event.

Scholarship – Ami Mayne/Julie Adkins/Joey Jones

A written report was submitted. The Committee proposed offering 10 dues scholarships with the new dues increase. The board was receptive, and the Committee will draft the language.

Awards – Vickie Barger/Jill Davidson

A written report was submitted.

Social – Amie Lynn/Kyle Smith

No report.

OLD BUSINESS

None was presented at this time.

NEW BUSINESS

Jessica Marquez announced that Auditor Faber canceled his Thursday breakfast attendance. Bob Hinkle and Tiffany Ridenbaugh will fill the time, allowing Bob to provide a brief AOS update, thank the group, and introduce Tiffany as his successor as he will be retiring at the end of the year.

ANNOUNCEMENTS

- Early Conference Registration/Kick-off Reception, this evening, from 8:00 – 10:00 p.m. – Lobby Terrace
- Moderators Meeting, tomorrow morning, at 8:30 a.m. – Easton E
- Next Board Meeting, Friday, November 21, 2025, beginning at 10:30 a.m. – Brick House Blue, New Albany
- Next Education Committee Meeting, Friday, November 21, beginning at 12:00 pm – Brick House Blue, New Albany

The meeting adjourned at 6:27 p.m.



2026 Board & Education Committee Meetings

Board Meetings	
February 13	10:30 a.m.
March 20	10:30 a.m.
May 22	10:30 a.m. Teams Meeting
September 29	6:00 p.m. Hilton Downtown Cleveland
November 20	10:30 a.m.

Education Committee Meetings	
February 13	12:00 noon
March 20	12:00 noon
November 20	12:00 noon

Ohio GFOA
Balance Sheet
October 31, 2025

-----ASSETS-----	Current Year	Last Year
CURRENT ASSETS		
HNB - Operating Account	\$ 41,105.83	48,002.90
Prepaid Expenses	27,039.00	20,168.75
INVESTMENT ACCOUNTS		
Cash-Investments	74,824.03	64,721.24
Raymond James	250,474.00	246,913.50
<u>Total Value of Investments</u>	<u>325,298.03</u>	<u>311,634.74</u>
Total Current Assets	\$ <u>393,442.86</u>	<u>379,806.39</u>
-----LIABILITIES AND CAPITAL-----		
CURRENT LIABILITIES		
TOTAL CURRENT LIABILITIES	<u>0.00</u>	<u>0.00</u>
TOTAL LIABILITIES	0.00	0.00
CAPITAL		
Net Assets	\$ 364,779.98	320,756.67
Current Year	28,662.88	59,049.72
TOTAL CAPITAL	<u>393,442.86</u>	<u>379,806.39</u>
TOTAL LIABILITIES & CAPITAL	\$ <u>393,442.86</u>	<u>379,806.39</u>

Ohio GFOA
INCOME STATEMENT
For the Month Ending October 31, 2025

	Annual Budget	Current Month Actual	Year-to-Date Actual	Actual H/(L) Budget	Last Year to Date
INCOME					
Dues	\$ 64,000.00	\$ 380.00	\$ 73,060.00	9,060.00	\$ 73,175.00
Total Dues Income	64,000.00	380.00	73,060.00	9,060.00	73,175.00
MEETINGS INCOME					
Corporate Sponsors	150,000.00	20,000.00	152,500.00	2,500.00	151,800.00
Intro to Finance Seminar	8,000.00	0.00	11,700.00	3,700.00	7,875.00
Advanced Acctg.	7,500.00	0.00	12,220.00	4,720.00	7,360.00
Annual Conference	172,000.00	7,165.00	180,900.00	8,900.00	157,482.00
Intermed Accounting Semi	6,000.00	0.00	14,315.00	8,315.00	570.00
Webinars (non-members)	100.00	0.00	101.58	1.58	106.88
Total Meetings Income	343,600.00	27,165.00	371,736.58	28,136.58	325,193.88
OTHER INCOME					
Interest Income	6,000.00	541.57	6,553.00	553.00	5,360.67
Dividends	2,000.00	245.45	2,287.94	287.94	1,765.52
Gain/loss on investments	0.00	7.00	3,311.00	3,311.00	9,430.05
Prior Year Income	3,025.00	0.00	1,350.00	(1,675.00)	655.00
Total Other Income	11,025.00	794.02	13,501.94	2,476.94	17,211.24
TOTAL INCOME	\$ 418,625.00	\$ 28,339.02	\$ 458,298.52	39,673.52	\$ 415,580.12
EXPENSES					
OPERATING					
Administrative Fees	\$ 104,733.00	\$ 8,727.73	\$ 87,277.21	(17,455.79)	\$ 85,231.68
Staff Expenses	2,000.00	0.00	1,375.19	(624.81)	670.52
Board Meetings/Expense	5,500.00	759.00	1,604.08	(3,895.92)	4,127.73
Accounting	8,355.00	7,915.00	8,275.00	(80.00)	4,400.00
Dues/Subscriptions	225.00	0.00	393.75	168.75	56.25
Insurance	2,000.00	0.00	2,017.00	17.00	1,946.00
Office Supplies	2,600.00	260.84	2,140.84	(459.16)	2,133.90
Postage	100.00	4.51	41.41	(58.59)	48.03
Printing	200.00	10.51	178.54	(21.46)	160.25
Telephone	1,200.00	74.72	749.20	(450.80)	773.80
Zoom	1,000.00	0.00	917.90	(82.10)	902.90
Total Operating	127,913.00	17,752.31	104,970.12	(22,942.88)	100,451.06
MEMBERSHIP PROGRAMS					
Newsletter	600.00	0.00	1,384.60	784.60	434.86
Web Site/Formstack	9,000.00	62.60	9,254.20	254.20	7,075.21
Certification Presentations	150.00	0.00	0.00	(150.00)	0.00
Scholarships	14,500.00	3,011.60	6,251.60	(8,248.40)	10,493.13
Education Committee	1,500.00	0.00	845.08	(654.92)	903.93
Social Media/Marketing	6,000.00	0.00	6,000.00	0.00	6,000.00
National Meetings	25,000.00	0.00	15,054.60	(9,945.40)	21,508.11
Total Membership Progr	56,750.00	3,074.20	38,790.08	(17,959.92)	46,415.24

Ohio GFOA
INCOME STATEMENT
For the Month Ending October 31, 2025

	Annual Budget	Current Month Actual	Year-to-Date Actual	Actual H/(L) Budget	Last Year to Date
MEETINGS/SEMINARS					
Intro to Finance Seminar	3,000.00	0.00	3,192.20	192.20	1,694.33
Advanced Acctg.	11,500.00	0.00	13,850.39	2,350.39	11,449.86
Debt Seminar	0.00	0.00	0.00	0.00	6,399.00
Annual Conference	239,775.00	174,292.31	252,801.88	13,026.88	181,984.91
Intermediate Acct Seminar	5,000.00	0.00	6,646.45	1,646.45	0.00
Total Meetings/Seminars	259,275.00	174,292.31	276,490.92	17,215.92	201,528.10
OTHER					
Bank Charges	120.00	10.00	100.00	(20.00)	100.00
Miscellaneous	0.00	0.00	185.00	185.00	0.00
Contingency	21,328.00	0.00	0.00	(21,328.00)	0.00
Prior Year Expense	0.00	0.00	248.64	248.64	0.00
Credit Card Charges	9,000.00	924.53	8,850.88	(149.12)	8,036.00
Total Other	30,448.00	934.53	9,384.52	(21,063.48)	8,136.00
TOTAL EXPENSES	\$ 474,386.00	\$ 196,053.35	\$ 429,635.64	(44,750.36)	\$ 356,530.40
NET INCOME	\$ (55,761.00)	\$ (167,714.33)	\$ 28,662.88	84,423.88	\$ 59,049.72

NOTE: Certain disbursements/receipts are recorded using the Cash Basis accounting method



COMMITTEE REPORT TO BOARD

Date: November 18, 2025

Committee Name: **GFOA State Representative**

Submitted By: Stacey Russell

Update/Summary of Activities:

Information from GFOA:

Call for topics for GFOA 2026 in Chicago Illinois, June 28-July 1 is open. This will be GFOA's 120th Annual Conference. Pre-Conferences Sessions are posted. Registration & Housing are also open. Registration fees are as follows for Government Members: Before January 31: \$600, January 31 -March 27: \$625, After March 27: \$650

<https://www.gfoa.org/gfoa2026-call-for-topics>

Upcoming Conference & Training Opportunities: GFOA offers a wide range of continuing education including in-person sessions, webinars and ELearning. All are available to review at <https://www.gfoa.org/events>

In-Person:

- ERP Readiness & System Selection, Denver, CO December 9-10
- Accounting Academy, Denver, CO December 9-11
- Advanced Budget Academy, Denver, CO December 9-11
- Budget Academy, Denver, CO December 9-11
- Rethinking Budget Readiness Assessment Workshop, Denver CO December 10
- Understanding Government Compensation and Payroll, Denver, CO December 11-12

Webinars:

- GFOA offers approximately 5 webinars over the next 4 months. Ranging from 1-2 CPEs and pricing from \$50 - \$95 for members and \$100 - \$200 for non-members

ELearning:

- Advanced Governmental Accounting, December 2-4
- Art of Budget Communications, December 2-4
- Best Practices in Debt Issuance and Management, December 9-11
- 2025 Annual Governmental GAAP Update, December 17 and January 13
- Preparing an Annual Comprehensive Financial Report: A Detailed Walk-through, January 9, 16, 23
- Fundamentals of Local Government Budgeting, January 21-23

Networking Opportunities:

- LGBTQIA+ Caucus December 4
- WPFN Book Club, December 9 & 10
- Black Caucus Listen and Learn Series, December 12, January 16 & 30
- Small Government Forum: Internal Controls for Small Governments, January 22

Action Requested of Board: None at this time



**Elevate Your Brand: 2026 Ohio GFOA
Corporate Sponsorship Opportunities**

Become a valued **2026 Ohio GFOA corporate sponsor!** By partnering with us, you'll enhance your visibility and position your brand as a key supporter and leader within the public finance community. The sponsorship year runs from January through December 2026.

All sponsors will receive the following:

- Acknowledgment of your support at all Ohio GFOA events.
- Included in the list of sponsors on the Ohio GFOA website, www.ohgfoa.com, indicating sponsorship level.
- Sponsor ribbons for your company representatives' name badges at events.
- Access to a digital list of participants after the annual conference and applicable events.
- Additional perks based on your sponsorship level, as detailed below.

Platinum Level - \$10,000

Ohio GFOA Annual Conference specific benefits:

- Company logo featured on the Ohio GFOA annual conference bag presented to attendees.
- One complimentary exhibit booth at the Annual Conference in a "Choice Location" (*valued up to \$1,200*). **Separate registration for the exhibit is required.**
- Two complimentary conference registrations covering all meal functions (*valued up to \$750*).
- Guaranteed speaking opportunity at the Annual Conference. **Deadline: February 27, 2026.**
- Option to include your company-provided giveaway in each attendee conference bag at your company's expense (must be provided to Ohio GFOA by **September 7, 2026**, to allow time for assembly).
- Option to add conference lanyards featuring your company logo for an additional sponsorship fee of \$3,500 (limited to one company per year). **Deadline: July 31, 2026.**

Additional benefits:

- Two complimentary registrations for each Ohio GFOA seminar and social event, transferable at your discretion (*value varies*).
- Opportunity to submit up to four articles to be included in the E-Newsletter and shared on LinkedIn.
- Opportunity to contribute content for the LinkedIn page.
- Your company logo featured in the E-Newsletter, LinkedIn, and conference mobile app – each with a direct link to your company's homepage.
- Facilitation of a webinar featuring a relevant topic of your company's choosing targeted and marketed to Ohio GFOA members.

Gold Level - \$7,500

Ohio GFOA Annual Conference specific benefits:

- One complimentary exhibit booth at the Annual Conference in a "Choice Location" (*valued up to \$1,200*). **Separate registration for the exhibit is required.**
- One complimentary conference registration covering all meal functions (*valued up to \$375*).
- Guaranteed speaking opportunity at the Annual Conference. **Deadline: February 27, 2026.**
- Option to include your company-provided giveaway in each attendee conference bag at your company's expense (must be provided to Ohio GFOA by **September 7, 2026**, to allow time for assembly).
- Option to add conference lanyards featuring your company logo for an additional sponsorship fee of \$3,500 (limited to one company per year). **Deadline: July 31, 2026.**

Additional benefits:

- One complimentary registration for each Ohio GFOA seminar and social event, transferable at your discretion (*value varies*).
- Opportunity to contribute content for the LinkedIn page.
- Your company logo featured in the E-Newsletter, LinkedIn, and conference mobile app – each with a direct link to your company's homepage.
- Facilitation of a webinar featuring a relevant topic of your company's choosing targeted and marketed to Ohio GFOA members.

Silver Level - \$5,000

Ohio GFOA Annual Conference specific benefits:

- 75% discount on the price of an exhibit booth at the Annual Conference (*valued up to \$900*). **Separate registration for the exhibit is required.**
- One complimentary conference registration covering all meal functions (*valued up to \$375*).
- Option to add conference lanyards featuring your company logo for an additional sponsorship fee of \$3,500 (limited to one company per year). **Deadline: July 31, 2026.**

Additional benefit:

- Your company logo featured in the E-Newsletter, LinkedIn, and conference mobile app – each with a direct link to your company's homepage.

Bronze Level - \$2,500

Ohio GFOA Annual Conference specific benefits:

- 50% discount on the price of an exhibit booth at the Annual Conference (*valued up to \$600*). **Separate registration for the exhibit is required.**
- 50% discount on the price of one conference registration, covering all meal functions (*valued up to \$175*).

Additional benefit:

- Your company logo featured in the E-Newsletter, LinkedIn, and conference mobile app – each with a direct link to your company's homepage.

Red, White & Blue Level - \$1,000

Your company logo featured in the E-Newsletter, LinkedIn, and conference mobile app – each with a direct link to your company's homepage.

Ohio Reception at National GFOA Conference - \$10,000

- Your company logo featured in the E-Newsletter, LinkedIn, and conference mobile app – each with a direct link to your company's homepage.
- Acknowledgment and signage at the Ohio Reception.
- Limited to one company per year unless multiple vendors choose to collaborate and share the sponsorship.

Entertainment at the Ohio GFOA Annual Conference Presidents Reception Add-On - \$5,000

- Add-on is only available to Platinum, Gold, and Silver Level Sponsorships.
- Acknowledgment and signage at the Presidents Reception.
- Limited to one company per year unless multiple vendors choose to collaborate and share the sponsorship.

Become a Sponsor Today!

(Click on the link above. If you are not a member, instead of logging in at the top, you will go to the bottom section, "Potential sponsors, future members, and other friends of Ohio GFOA," put in your email and click register. You can then complete the online sponsorship form, attach your logo file, and submit payment.)



November 21, 2025

Submitted By: Jeff McCuen/Stacey Russell

2025 Goal(s):

The committee works to provide relevant and timely professional development opportunities to our members at locations throughout the state of Ohio.

Update/Summary of Activities:

2025 Review

2025 was a great year for the Education Committee. We had 3 in person seminars, 4 webinars and our annual conference in Columbus,

The 2025 Annual conference had 414 attendees.

The education committee will review evaluations from 2025 and make decisions on offerings for 2026 at their meeting following the Board meeting. All Board members are encouraged to attend.

2026 Webinars: Deadline for Platinum & Gold Level Sponsors to Reserve a Webinar spot is February 27, 2026.

2026 Annual Conference: Hilton, Downtown Cleveland, September 30 – October 2

Conference session forms will be due Monday, January 19, 2026.

Education Committee Dates: February 13, March 13 and November 20

Supporting Our Members Through Collaborative, Innovative, and Inclusive Public Finance Education and Networking.



39th ANNUAL CONFERENCE & MEMBERSHIP MEETING

September 30-October 2, 2026

Hilton Downtown Cleveland

General Session Speaker Options

Larry Weaver

<https://www.larryweaver.com>

Bruce Turkel

<https://p.allego.com/XtAJ5JuEwIivwNX>

Michael Hingson

<http://www.michaelhingson.com>

Marianne Renner

<https://mariannerenner.com/move-from-chaos-to-clarity-in-3-simple-steps/>

Caleb Spitler

www.calebspitler.com

Rory Gardiner

<https://www.youtube.com/watch?v=IsSQ3-udjUo>

Craig Zablocki

<https://www.youtube.com/watch?v=QDX2NMK45kc>

Will Bowen

<https://willbowen.com/speaking/>

(\$12,000 plus \$1,500 in fixed travel expenses and up to 2 nights' hotel. Includes up to 2 ½ hours of content - typically, a 60-minute keynote followed by a deep-dive breakout.)



Current Scholarship Offerings

Ohio GFOA's scholarship opportunities support education and help individuals grow while alleviating the financial burden.

National GFOA Annual Conference Attendee Scholarship

One (1) Scholarship Awarded (\$540 Value). Includes:

- Reimbursable National GFOA annual conference registration (\$540 value).
- Reimbursable travel expenses up to \$1,500.

Requirements:

- Must be an Ohio GFOA member and an Ohio government employee.
- A letter on government stationary, from the applicant's supervisor, stating why the individual is worthy of the scholarship and that the applicant is permitted to attend the entire conference.
- A one-page statement, from the applicant, telling why they are deserving of the award.

GFOA Certified Public Finance Officer (CPFO) Program Scholarship

GFOA is offering a limited number of scholarships (\$1,200 value) to Ohio GFOA members to participate in GFOA's Certified Public Finance Officer (CPFO) program. The CPFO Program is a self-study program that leads to a designation that signals your mastery of various public finance disciplines. Having the designation is a great way to strengthen your value as a finance officer to your organization, generate opportunities for career growth, and broaden your network to other like-minded professionals.

REQUIREMENTS:

- A current and paid GFOA membership (GFOA membership is required during the program enrollment and to maintain the CPFO designation).
- A current and paid Ohio GFOA membership.
- Minimum of two years' experience in public finance
- Minimum of an Associate's degree earned in a finance-related field

Traditional Student College Scholarship

One (1) \$1,000 Scholarship Awarded

Requirements:

- Ohio resident enrolled full-time and entering at least the junior year of undergraduate study in an accredited Ohio college or university.
- Declared major in a field of study related to accounting, finance, budgeting or other similar area.
- Good academic standing.
- Provide list of classes taken, grades (include grade scale) and current class schedule.
- Statement regarding public sector career plans and why you deserve this scholarship.
- Letter of recommendation.

Scholarship awarded as tuition reimbursement to student. Recipient to receive Ohio GFOA student membership, good through December 2026.

Ohio GFOA Board of Trustees family members are not eligible.

Continuing Education Scholarship

One (1) \$1,000 Scholarship Awarded

Requirements:

- Current member of Ohio GFOA.
- Minimum of two years employment in a government position (defined as direct government, school, library, non-private sector) preferably in finance, budgeting, accounting or related field.
- Enrolled in an accredited Ohio college or university, working toward a declared degree in finance, budgeting, accounting or related area of study (Bachelor's or beyond).
- Statement of future plans in the public sector.
- Copy of jurisdiction's tuition reimbursement policy or, if none, statement of supervisor.
- Letter of recommendation from the applicant's supervisor and others, if applicable.

Scholarship awarded as tuition reimbursement to student.

Current Ohio GFOA Board of Trustees and Scholarship Committee members are ineligible.

Annual Conference Attendee Scholarship

Three (3) Scholarships Awarded (\$900 Value). Includes:

- Ohio GFOA Annual Conference registration.
- A two-night hotel payment, made directly to the conference hotel.
- \$100 for travel expenses, made payable to entity.
- Ohio GFOA membership through December 2026.

Requirements:

- Must be an Ohio government employee.
- A letter on government stationery, from the applicant's supervisor, stating why the individual is worthy of the scholarship, that the applicant is permitted to attend the entire conference and that there are no other training opportunities nor financing available from the entity.
- A statement, from the applicant, telling why they are deserving of the award.
- Must be at least 21 years old, by September 1, 2025.

First-Time Annual Conference Attendee Scholarship

Five (5) Scholarships Awarded (\$900 Value). Includes:

- Ohio GFOA Annual Conference registration.
- A two-night hotel payment, made directly to the conference hotel.
- \$100 for travel expenses, made payable to entity.
- Ohio GFOA membership through December 2026.

Requirements:

- Must be an Ohio governmental entity employee.
- Must be a first-time Ohio GFOA conference attendee.
- A letter on government stationery, from the applicant's supervisor, stating why the individual is worthy of the scholarship, that the applicant is permitted to attend the entire conference and that there are no other training opportunities nor financing available from the entity.
- A statement, from the applicant, telling why they are deserving of the award.
- Must attend the conference welcome/business luncheon on Wednesday.
- Must be at least 21 years old, by September 1, 2025.

Annual Conference Student Attendee Scholarship

Three (3) Scholarships Awarded (\$900 Value). Includes:

- Ohio GFOA Annual Conference registration.
- A two-night hotel payment, made directly to the conference hotel.
- \$100 for travel expenses, made payable to entity.
- Ohio GFOA membership through December 2026.

Requirements:

- Must be a student enrolled in an accredited Ohio college or university.
- Declared major in a field of study related to accounting, finance, budgeting or other similar area.
- A letter on college or university stationery, from the applicant's professor, in their field of study, stating why the individual is worthy of the scholarship and that the applicant is permitted to attend the entire conference.
- A statement regarding public sector career plans, from the applicant, telling why they are deserving of the award.
- Must attend the conference welcome/business luncheon on Wednesday.
- Must be at least 21 years old, by September 1, 2025.

GFOA Leadership Academy

College of Charleston, Charleston, SC - November

Program Analysis

GFOA's Leadership Academy provides senior public and government finance professionals an opportunity to bolster their leadership and management skills to better serve their communities.

Who Should Attend?

- Finance Directors
- Assistant Finance Directors
- Treasurers, Department Managers
- City Managers
- Assistant City Managers

Additional information about the program can be found at <https://www.gfoa.org/leadership-academy>.

Application Process

In order to be considered for the Ohio GFOA scholarship, candidates will first have to be accepted into the program by GFOA. GFOA will communicate with Ohio GFOA about the individuals who have been accepted into the Academy to help determine who will receive the scholarship. Individuals who have been accepted in the Academy, but who do not receive a scholarship through Ohio GFOA, are still eligible to attend.

Tuition Fee/Scholarship

The Ohio Government Finance Officers Association (Ohio GFOA) shall select one participant and pay to GFOA the total \$2,500 tuition cost on behalf of the scholarship recipient, which includes all speaker and working sessions, weekday lunches, and several dinners and receptions. In addition, Ohio GFOA will reimburse the scholarship recipient up to \$2,000 for the cost of the hotel, registration, airfare and meals, not otherwise provided by GFOA, upon completion of the program. An expense reimbursement form shall be completed by the scholarship recipient and sent directly to the Ohio GFOA office, attention Nancy Waterhouse, Executive Director. Receipts greater than \$25 must be included in order to receive the reimbursement.

Following the Academy

Within one month of completing the course work at the Academy, the recipient shall prepare and submit an article to the Ohio GFOA quarterly newsletter, describing the experiences, benefits, and the learning accomplishments. In addition, the recipient shall accept an appointment to serve as an active member on the Ohio GFOA Education Committee.



Excellence in Government Achievement Award

Candidates for the Ohio GFOA Excellence in Government Award will be recognized for having shown a high degree of integrity, innovation and exceptional governmental leadership.

Criteria:

- Nominees do not have to be active Ohio GFOA members to be eligible.
- Describe, in detail, your reason for nominating this individual. Be sure to include related materials such as reports, certificates, newspaper accounts, etc., if applicable.

Career Achievement Award

Candidates for the Ohio GFOA Career Achievement Award will be recognized for serving as a governmental fiscal officer or a vendor representative for 15 years or more and for their involvement with the Ohio GFOA.

Criteria:

- Must be a member or an exhibitor/sponsor of Ohio GFOA for 10 years.
- Actively participated on a Ohio GFOA Committee, Board of Trustees, and/or a Speaker.
- Serve as a governmental fiscal officer or a vendor representative for 15 years.
- Must be retired or in the process of retiring.
- Describe, in detail, your reason for nominating this individual. Be sure to include any achievements at their workplace.
- Provide a form or letter from workplace acknowledging 15-year employment as a fiscal officer or exhibitor or sponsor representative.

Ethics Award

Candidates for the Ohio GFOA Ethics Award will be recognized for acting in a courageous manner upon discovery of an unethical act, showing dedication to the furtherment of public ethics by their actions.

Criteria:

- Nominees do not have to be active Ohio GFOA members to be eligible.
- Describe, in detail, your reason for nominating this individual. Be sure to include related materials such as reports, certificates, newspaper accounts, etc., if applicable.

Bradford M. Sprague Award for Excellence in Client Service

Candidates for the Ohio GFOA Bradford M. Sprague Award for Excellence in Client Service will be recognized for their lifetime service to the Ohio public finance community and through the Ohio GFOA with honesty and integrity throughout their careers.

Criteria:

- Served the Ohio public finance community as a vendor (financial, legal, or other professional services) for at least 20 years.
- Contributed to the enrichment of education within the field of Ohio public finance.
- Served in a mentoring capacity to advance the careers of individuals in government and/or individuals employed in the field of public finance.
- Demonstrated continuing excellence and innovation to the field of public finance.
- Made significant substantial and widely recognized contributions to the Ohio public finance community.
- Actively participated in Ohio GFOA.
- Describe, in detail, your reason for nominating this individual. Be sure to include related materials such as reports, certificates, newspaper accounts, etc., if applicable.

Innovation in Public Finance Award

Candidates for the Ohio GFOA Innovation in Public Finance Award will be recognized for implementing a unique, time-saving or cost-effective procedure or program in the public sector that has potential application for other entities.

Criteria:

- Nominees do not have to be active Ohio GFOA members to be eligible.
- Describe, in detail, your reason for nominating this individual. Be sure to include related materials such as reports, certificates, newspaper accounts, etc., if applicable.

Hugh Dorrian Lifetime Achievement Award

Candidates for the Ohio GFOA Hugh Dorrian Lifetime Achievement Award will be recognized for their lifetime service to the public and through the Ohio GFOA with honesty and integrity throughout their careers.

Criteria:

- Served the public as a government finance officer for at least 20 years.
- Contributed to the enrichment of education within the field of Ohio public finance.
- Served in a mentoring capacity to advance the careers of individuals in government and/or individuals employed in the field of public finance.
- Demonstrated continuing excellence and innovation to the field of public finance.
- Made significant substantial and widely recognized contributions to the public and the Ohio public finance community.
- Actively participated in Ohio GFOA.



COMMITTEE DESCRIPTIONS

(Current committees, pending updates by the Board)

Sponsorship Committee

The Sponsorship Committee is responsible for developing and maintaining relationships with corporate partners and sponsors to support the Ohio GFOA's programs and events. The committee seeks new sponsorship opportunities, enhances sponsor engagement, and ensures that sponsors receive value for their contributions.

Membership Committee

The Membership Committee works to attract new members, retain existing members, and enhance the overall membership experience. The committee develops outreach strategies, fosters engagement, and ensures that members benefit from Ohio GFOA's resources, networking opportunities, and professional development programs.

Scholarship Committee

The Scholarship Committee oversees the administration and awarding of scholarships to students and professionals seeking to advance their knowledge in governmental finance. The committee reviews applications, selects recipients, and promotes scholarship opportunities to encourage participation in Ohio GFOA educational programs.

Awards Committee

The Awards Committee recognizes outstanding achievements in governmental finance through various awards and honors. The committee evaluates nominations, selects recipients, and organizes award presentations to highlight excellence, innovation, and dedication in the field.

Social Committee

The Social Committee plans and coordinates networking and social events that foster connections among Ohio GFOA members. The committee organizes receptions, mixers, and informal gatherings to encourage engagement and relationship-building within the governmental finance community.

Education Committee

The Education Committee is dedicated to providing high-quality training and professional development opportunities for Ohio GFOA members. The committee plans workshops, webinars, and conferences, ensuring that educational content remains relevant and beneficial to finance professionals at all levels.

Communications Committee

The Communications Committee manages Ohio GFOA's outreach efforts, including newsletters, social media, and website updates. The committee ensures timely and effective communication of news, events, and resources to members while enhancing the organization's visibility and engagement.