

2021 Virtual Town Finance School Agenda

Day 1 Agenda

Town Budget Workshop

Katie Hodgdon, Counsel, Association of Towns of the State of New York and Dan Acquilano, Manager, Local Official Training Unit, Office of the State Comptroller

The process of developing a balanced budget for your town can be a confusing and stressful undertaking. The Association of Towns of the State of New York (AOT) has partnered with the Office of the State Comptroller (OSC) to offer a budget workshop as part of this year's Town Finance School. The intent of this course is to help town officials better understand the process behind developing and implementing a structurally balanced budget. The workshop will be jointly presented by an OSC auditor and a member of AOT's legal team. The workshop will be divided into three one-hour sessions.

Part 1: 9:00 AM – 10:00 AM

Town Budget Workshop: Part 1 – Town Budget Overview

This part of the workshop will focus on understanding the purpose, terminology, content and legal statutes surrounding the town budget.

Five-minute break

Part 2: 10:05 AM – 11:05 AM

Town Budget Workshop: Part 2 – Town Budget Planning and Development

This part of the workshop will identify best practices in collecting departmental inputs, applying trend analysis, and matching revenues to appropriations to help develop a structurally balanced budget.

Five-minute break

Part 3: 11:10 AM – 12:10 PM

Town Budget Workshop: Part 3 – Town Budget Adoption and Monitoring

This part of the workshop will provide a foundation for the proper process to follow in the creation and adoption of the preliminary and tentative budget, as well as the need for the town board to provide oversight in ensuring budget adherence, and making modifications as necessary.

Half-Hour lunch break

12:40 PM – 1:40 PM

The American Rescue Plan Act: What Towns Need to Know

Sarah Brancatella, Legislative Director and Counsel and Katie Hodgdon, Counsel, Association of Towns of the State of New York; and Dan Acquilano, Manager, Local Official Training Unit, Office of the State Comptroller

In March 2021, the American Rescue Plan Act was adopted to address some of the impacts of the COVID-19 pandemic. This course will go over the section of ARPA known as "The Coronavirus Local Fiscal Recovery Fund," and any available regulations on funding allocated for local governments, how the money can be used, deadlines and timeframes, records requirements, and other issues of which towns should be aware.

End of Day 1

Day 2 Agenda

9:00 AM – 10:00 AM

Hungry for Grants? An Insider's Guide to the Consolidated Funding Application Process to Satisfy Your Funding Appetite

Jim Thatcher, Manager, Community Development, C.T. Male Associates

As communities emerge from a lost year for many grant programs, the time is ripe to prepare for the next wave of funding for your essential projects. This session will serve as a primer for the state's Consolidated Funding Application (CFA) process and how to secure creative financing for local priorities. Topics include: grants to help you plan and design future projects; must-have components that make successful applications; and avoiding common pitfalls so your proposals will stand out at the crowded funding table. C.T. Male's public financing expert will provide an "insider's guide" to help shape your CFA projects and identify other funding resources to fill your grants plate!

Five-minute break

10:05 AM – 11:00 AM

Towns and the New York State Budget

Sarah Brancatella, Legislative Director and Counsel and Katie Hodgdon, Counsel, Association of Towns of the State of New York; Dan Acquilano, Manager, Local Official Training Unit, Office of the State Comptroller

The state budget that was adopted in April of this year has significant implications for towns. This course will discuss both the funding made available to towns in this budget cycle and what policies were adopted as part of the budget that impact towns.

End of Day 2

The Town Finance School is an annual event cosponsored by the Association of Towns of the State of New York and the Office of the State Comptroller.

The 2021 Town Finance School will be held virtually on May 19 and May 20. \$65 registration fee to attend.

To register, please visit: https://www.nytowns.org/Towns/Training/Online_Registration/Towns/AOTEvents_List.aspx?hkey=2ffc5bd9-7871-4776-af5c-1f1076ecfd7d

2021 Town Finance School Agenda

Wednesday, May 19

9:00 a.m.

Town Budget Workshop: Overview (Part 1 of 3)

Katie Hodgdon, Counsel, Association of Towns and Dan Acquilano, Manager, Local Official Training Unit, Office of the State Comptroller

10:00 a.m.

5-minute break

10:05 a.m.

Town Budget Workshop: Planning and Development (Part 2 of 3)

Katie Hodgdon and Dan Acquilano

11:05 a.m.

5 minute-break

11:10 a.m.

Town Budget Workshop: Adoption and Monitoring (Part 3 of 3)

Katie Hodgdon and Dan Acquilano

12:10 p.m.

Lunch break (30 minutes)

12:40 p.m.

The American Rescue Plan Act: What Towns Need to Know

Sarah Brancatella, Legislative Director and Counsel, Association of Towns and Katie Hodgdon and Dan Acquilano

1:40 p.m.

End of Day 1

Thursday, May 20

9:00 a.m.

Hungry for Grants? An Insider's Guide to the Consolidated Funding Application Process to Satisfy Your Funding Appetite

Jim Thatcher, CT Male

10:00 a.m.

5-minute break

10:05 a.m.

Towns and the New York State Budget

Sarah Brancatella, Katie Hodgdon and Dan Acquilano

11:00 a.m.

End of Day 2