

26th Annual Town Finance & Personnel School
Hotel Canandaigua – April 27th – 28th
Marriott Albany – May 6th – 7th
Agenda & Schedule of Events



NYAOT
Celebrating America's 250th Birthday

Monday, April 27th (Canandaigua) (Day 1)
Wednesday, May 6th (Albany Marriott) (Day 1)

2026 Finance & Personnel School Event Sponsors

7:30 a.m. - 8:30 a.m. Breakfast and Registration

8:30 a.m. - 9:00 a.m. Welcome and Opening Remarks

Concurrent Block 1

9:00 a.m. - 10:15 a.m.

Using Financial Reports to Analyze Financial Condition

- *Track One: Town Finance*

Ingrid Otto, Auditor 2, Office of the State comptroller (Canandaigua)

Joseph Testa, Auditor 2, Office of the State Comptroller (Albany)

This session will examine the use of City/Village financial reports, results of operations, and financial trend analysis to determine and monitor your own financial condition. We will discuss the role of both external and internal reports and then go into detail on how to comprehend and analyze the figures presented in the budget status report, bank reconciliation and balance sheet.

Creating a Successful Succession Plan

- *Track Two: Town Personnel*

Presented by Katie Hodgdon, Association Counsel, NYAOT, Chris Koetzle, Executive Director, NYAOT, and Michael Kenneally, Esq. & CEO, Comp Alliance

As the wave of retirements by experienced Town officials and management-level staff continues, effective succession planning is critical to maintaining continuity, institutional knowledge, and operational stability. With a focus on preserving institutional knowledge and knowledge-transfer strategies, this Succession Planning Program is designed to help town officials proactively identify, develop, and retain talent to ensure seamless transitions in key roles.

10:15 a.m. – 10:30 a.m. Coffee Break in the Exhibitor Hall

Concurrent Block 2

10:30 a.m. – 11:45 a.m.

Revaluation: What Town Officials Need to Know

- *Track One: Town Finance*

Presented by Warren J Wheeler, IAO, Executive Director, NYSAA

Revaluation is often misunderstood but frequently discussed at the local level. This session explains what a revaluation is, what it is not, and what is involved in undertaking one in New York State. Attendees will leave with a clearer understanding of how revaluation affects assessments, tax distribution, and the factors municipalities should consider when evaluating whether to proceed.



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Labor and Employment Case Law Update

- *Track Two: Town Personnel*

Presented by Sharon N. Berlin, Principal Member, Keane & Beane P.C., and Richard K. Zuckerman, Principal Member, Keane & Beane P.C.

11:45 a.m. 12:30 p.m. Lunch

Lunch & Learn - Show me the Money: How to Find Grants in Your Town

Presented by Mark Blask, MRB Group

This session will focus on practical strategies to help small towns in New York State identify and secure grant funding. We'll cover where to find opportunities, how to align projects with funding priorities, and what makes an application stand out. Drawing on experience working with municipalities across New York, this session will break down the grant process into simple, manageable steps while highlighting common pitfalls and proven approaches. Attendees will leave with actionable insights they can immediately apply in their communities.

Concurrent Block 3

12:30 p.m. – 1:45 p.m.

Common Town Audit Findings - What went wrong?

- *Track One: Town Finance*

William Naylor, Auditor 2, Office of the State Comptroller (Canandaigua)

Leslie Richard, Auditor 2, Office of the State Comptroller (Albany)

While OSC auditors may review financial activities, our audits often focus on whether a local government is performing activities in line with established criteria. In this session, we will discuss several examples of OSC audits to illustrate the various scope areas auditors may review, some specific audit findings, and our recommendations.

Effective Employee Evaluation and Discipline

- *Track Two: Town Personnel*

Presented by Jeffrey F. Swiatek, Partner, Hodgson Russ LLP

Effective approaches to employee evaluation and discipline in the public sector are essential to ensure operational efficiency and to limit liability. Explore the best practices for evaluations and documentation, successful use of disciplinary procedures and the critical role of the union during that process. Also review related issues such as addressing conduct outside the workday and the limits of 1st amendment protections.

1:45 p.m. 2:00 p.m. Break

Concurrent Block 4

2:00 p.m. – 3:15 p.m.

Hot Topics - Town Budget Edition

- *Track One: Town Finance*

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The town budget process is never static, and this session is designed to reflect that. This course will take a practical look at some of the current issues facing town officials as they navigate today's fiscal environment, including how artificial intelligence tools are being used to analyze spending trends, model budget scenarios, and present financial data to the public in more accessible ways. The session will also delve into fund balance management, including how towns can build, maintain, and strategically deploy fund balance to weather uncertainty and support long-term financial health. Additional topics will cover the tax cap, managing personnel-driven budget pressures like healthcare and pension costs, and identifying grant and state aid opportunities that can help offset local spending. This session is designed for town officials at all experience levels.

Presented by Dan Acquilano, Manager, Division of Local Government & School Accountability, OSC; Sarah Brancatella, Deputy Director, NYAOT; Katie Hodgdon, Association Counsel, NYAOT

Fundamentals of Collective Bargaining in the Public Sector

- *Track Two: Town Personnel*

Presented by Bryan J. Goldberger, Esq., Goldberger & Kremer, Attorneys at Law, Albany, NY

This course will provide an overview of the collective bargaining process in the public sector. Topics to be discussed include: strategies to prepare for negotiations; discussion of the applicable impasse procedures under the Taylor Law; mandatory/nonmandatory and permissive subjects of bargaining; and strategies for preparing for and participating in negotiations and impasse procedures.

3:15 p.m. 3:30 p.m. Break

Concurrent Block 5

3:30 p.m. – 4:30 p.m.

Navigating Budget Analysis and Review

- *Track One: Town Finance*

Presented by Dan Acquilano, Manager of Local Official Training, Office of the State Comptroller

This session will provide you with the suggested formula to use in determining your municipal budget, and how to more effectively match revenues and appropriations so that when unforeseen occurrences happen, you can more easily handle revenue shortfalls or expenditure increases.

A Guide to Leave Laws for Municipalities in New York

- *Track Two: Town Personnel*

Presented by Katie Hodgdon, Association Counsel, NYAOT

Employee leave is one of the areas where municipalities face the greatest liability exposure, and the obligations are more numerous than most local governments realize. Town officials must navigate federal mandates, a growing patchwork of state statutory leaves, and policy-based frameworks that interact in ways that are not always obvious until something goes wrong. This course covers FMLA and Paid Family Leave, short-term disability sequencing, and the statutory and policy-based leaves that tend to fly under the radar until they don't. Participants will leave with a stronger foundation for making sound, defensible decisions when leave questions arise in their municipality.

5:30 p.m. – 6:30 p.m. Reception sponsored by NYMIR & Comp Alliance

~End of Day 1 Programming~

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Tuesday, April 28th (Canandaigua) (Day 2)
Thursday, May 7th (Albany Marriott) (Day 2)

7:30 a.m. - 8:30 a.m. Breakfast and Registration

8:00 a.m. - 8:30 a.m. Coffee and Candor: Women's Leadership Caucus Roundtable
Program details and speakers to be announced

8:30 a.m. - 9:00 a.m. Opening Remarks

Concurrent Block 1

9:00 a.m. - 10:15 a.m.

EPIC - Programming Session

- *Track One: Town Finance*

Who's the Boss? - Take Two!

- *Track Two: Town Personnel*

Presented by Lori Mithen-DeMasi, Chief Counsel, and Sarah Brancatella, Deputy Director, NYAOT

Who has the authority to hire and fire a court clerk or heavy equipment operator? Can the town board reduce a justice's salary? Town departments and town boards can clash when there is a misunderstanding regarding their respective roles and authority. This class goes over the legal authority and interactions between the various elements of town government.

10:15 a.m. 10:30 a.m. Break

Concurrent Block 2

10:30 a.m. – 11:45 a.m.

Safeguarding Our Assets: Fraud Prevention and Detection

- *Track One: Town Finance*

William Naylor, Auditor 2, Office of the State Comptroller (Canandaigua)

Joseph Testa, Auditor 2, Office of the State Comptroller (Albany)

This session will identify steps local officials can take to help detect and prevent fraud and abuse. Participants will learn about the fraud triangle, which consists of common red flags, organizational vulnerabilities to fraud and how to minimize risks.

Conducting Workplace Investigations in Local Governments

- *Track Two: Town Personnel*

11:45 a.m. 12:30 p.m. Lunch

Concurrent Block 3

12:30 p.m. – 1:45 p.m.

Establishing and Accounting for Reserves

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- *Track One: Town Finance*

Ingrid Otto, Auditor 2, Office of the State Comptroller (Canandaigua)

Leslie Richard, Auditor 2, Office of the State Comptroller (Albany)

Properly established reserves can provide many benefits to municipalities. This session will assist local officials in understanding the purpose, benefits and proper use of reserves. We will discuss several commonly used reserves, the distinction between accounting and legal reserves, and the accounting treatment for reserves.

Care, Trust and Engage: Customer Service Excellence in Local Government (Canandaigua Only)

- *Track Two: Town Personnel*

Presented by Dr. Ian M. Coyle, ICMA-CM, Founder/President, Pracademic Partners

Trust in government is more critical than ever and delivering exceptional customer service is not just a function, it's a responsibility. This engaging session will explore how local government leaders can cultivate a culture of care, build public trust, and foster meaningful engagement with their communities. Key takeaways include: Strategies to foster a culture of customer service in local government; Methods to build and sustain public trust through transparency and engagement; Practical tools for enhancing resident interactions and responsiveness; Insights into overcoming barriers to excellent service delivery.

1:45 p.m. 2:00 p.m. Break

Concurrent Block 4

2:00 p.m. – 3:15 p.m.

Exceptions to State Competitive Bidding

- *Track One: Town Finance*

Presented by Sarah Brancatella, Deputy Director, New York Association of Towns and NYS Office of General Services - Procurement Services

Competitive bidding under General Municipal Law § 103 can seem like a clear-cut rule: once a contract or purchase reaches a certain amount, bidding is required. But the law is not quite that simple. Section 103 contains several important exceptions, and understanding them is just as important as knowing the rule itself. This course will examine those exceptions, explain the circumstances in which they apply, and help local officials navigate competitive bidding requirements with greater confidence.

Turning IT into a Financial Asset: How Municipal Leaders Can Protect, Stretch and Justify Every Dollar

- *Track Two: Town Personnel*

Presented by Lisa A. Brown, CEO & Founder, CST Group Inc. IIT for Local Government

Walk away with practical strategies to control IT costs, reduce financial risk, and justify every dollar you spend.

Description

Technology is often treated as a cost center, but for municipalities, it should be managed as a financial asset that protects operations, reduces risk, and supports long-term sustainability. This session helps town leaders and finance professionals understand how to shift their approach to IT spending, so every dollar delivers measurable value.

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Attendees will learn how to protect public funds by reducing exposure to cyber and operational risks, navigate the growing impact of insurance requirements and compliance standards, stretch budgets through smarter planning and spending models, and confidently justify technology investments to stakeholders. The session focuses on practical strategies that improve financial control, strengthen accountability, and align IT decisions with the mission of serving the community.

3:15 p.m. **3:30 p.m.** **Break**

Concurrent Block 5

3:30 p.m. – 4:30 p.m.

Hays Financial Programming

- *Track One: Town Finance*

Ask the Attorneys / Ask the Auditors

- *Track Two: Town Personnel*

NYAOT Staff and OSC Staff

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