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TRAINING FOR PUBLIC AUTHORITY BOARD MEMBERS AND STAFF

The Authorities Budget Office (ABO) is issuing instructions on how to become a trainer eligible to provide approved training to State and local public authority board members. The ABO seeks to approve trainers qualified to provide high quality training for board members and staff that focuses on the role and responsibilities of public authority board members.

I. INTRODUCTION

New York State Public Authorities Law requires individuals appointed to public authority boards to “participate in state approved training regarding their legal, fiduciary, financial and ethical responsibilities as board members of an authority within one year of appointment to a board.” It also requires board members to “participate in such continuing training as may be required to remain informed of best practices, regulatory and statutory changes relating to the effective oversight of the management and financial activities of public authorities and to adhere to the highest standards of responsible governance.”

In order to ensure that board members meet their statutory training requirement, the Authority Budget Office (ABO) has developed a training program and criteria for approving training organizations that wish to provide training to board members and staff of State and local public authorities.

The purpose of this training is to prepare board members of State and local public authorities to fully engage in their role as board members. It is intended to empower public authority boards to effectively oversee their authority and recognize the responsibility they have to the mission of their organization and the public.

II. APPROVAL OF PUBLIC AUTHORITY BOARD TRAINERS

To be approved, interested training organizations must complete the attached application and provide the ABO with a comprehensive set of proposed training materials.

Qualified applicants will be approved for a period of three years; after such time the organization must reapply for approval. Once approved, an organization may enter into agreements with public authorities to provide training.

III. Conditions of Approval

If approved, the organization agrees to submit to the following conditions:

- The organization **must** use the training presentation developed by the ABO. With the consent of the ABO, the organization may add material to supplement the ABO developed presentation.
- The ABO reserves the right to revoke approval in the event that the training provided to authorities does not adhere to the scope and quality of training as described in the approved application.
- The organization must notify the ABO of a training session at least 7 working days prior to its scheduled date.
- The organization must provide the ABO within 30 days of a training session a list of all attendees.
- The organization must provide the ABO with a summary of questions raised by participants to provide feedback to the ABO on issues of concern to board members no later than 30 days of each session.
- The organization must maintain records of its training, including lists of training participants and all training materials, for three years after the training occurred to be reviewed by the ABO upon request.

IV. SCOPE OF TRAINING CURRICULUM

The training curriculum must include the public authority board member training presentation developed by the ABO. Click [here](#) to download the presentation. The training program addresses the following categories:

- A. What it Means to be a Public Authority Board Member Today**
- B. Responsibilities of the Board under the Public Authorities Reform Act and Related Laws**
- C. How Can Public Authority Boards be Effective**

V. APPLICATION REQUIREMENTS

Information to be Provided by Proposers

The following information must be provided to the ABO. An application that does not provide all the information requested below will be subject to rejection. The application must contain sufficient information to assure that it is comprehensive and consistent with the ABO's training standards.

No information beyond that specifically requested is required, and organizations are strongly encouraged to keep their submissions short and concise.

A. Contact Information and Training Summary

Applicants must complete the "Application for Trainer Approval". Upon approval of the application, the information provided on the first page of the application will be posted on the ABO website for public authorities to use to identify approved trainers and to initiate contact with an approved trainer. This information includes:

- The organization's name, contact person, address, telephone number, and e-mail address.
- Whether the training is approved for continuing education credit.

B. Training Experience

Applicants must demonstrate sufficient expertise in corporate governance principles and training. The application must include:

- A summary of the organization's most relevant corporate governance experience, with emphasis on training for public sector institutions.
- Three references that can attest to the training qualifications and experience of the organization and its proposed trainers.
- A list of all trainers the organization expects to use and a resume of each trainer.

C. Training Curriculum and Course Content

The applicant **must** use the presentation prepared by the ABO. The applicant must also provide any training materials that it intends to add to the core ABO presentation. These supplemental slides, training materials, or examples may be incorporated into the organization's presentation only with the approval of the ABO.

D. Proprietary Information

Information provided to the ABO concerning the experience of the applicant and the applicant's training materials will not be posted on the ABO website. This information will be treated as proprietary, and will only be used by the ABO to approve or disallow the applicant as a recognized State approved public authority board member trainer.

VI. APPLICATION SUBMISSION PROCEDURES

The Application for Trainer Approval should be submitted electronically to: info@abo.state.ny.us.

Applications are accepted and will be reviewed by the ABO in an ongoing basis.

Organizations which have been approved to provide public authority board member training will be notified in writing by the ABO.

Organizations whose Application for Trainer Approval is not approved will also be notified and may amend their application and reapply for approval.

Once approved, organizations may enter into agreements with public authorities to provide board member training.

Click [here](#) to download the Application for Trainer Approval.