



2022 ADVANCED INSTITUTE

May 16 – 18 • H Hotel • Midland

The Road to Success

MiCPT/CPFA POINT TALLY SHEET

MiCPT - Michigan Certified Professional Treasurer ~ CPFA - Certified Public Finance Administrator

Use this sheet to keep track of education points earned at the 2022 Advanced Institute. There are a possible 10.0 MiCPT points; 8.375 CPFA points; 4.5 ACPFA and 1.5 CPFIM/ACPFIM points for this event.

Instruction Time	Topic	Speaker/Description	MiCPT Points	CPFA Points	ACPFA Points	CPFIM/ACPFIM Points
Monday, May 16, 2022						
1.5 Hour 8:30-10:00 am	Let's Get Engaged: Coloring Outside the Lines	Opening Keynote Speaker, Jeff Tobe will share how to spark innovative thinking in yourself and others; how to re-define the challenges we face every day; motives for being more creative in your professional and personal life; techniques to effectively manage the change that comes with innovation; how to tap your creativity to challenge your existing "boundaries" and more!	.75	.75		
1.75 Hours 10:15-12:00 pm	Workplace Wellness	Being productive in the workplace goes hand in hand with how we feel physically and mentally. Making good decisions each day fuels your body with the energy it needs to stay engaged and focused at work. Learn how to set up your day for optimal well-being.	.875	.875		
2.0 Hours 1:00-3:00 pm	How to Define and Share Treasury's Contribution	No matter the type or size of your municipality, the impact you have on your community is huge. Your story deserves to be told! Everything you need to tell that story is available at your fingertips. Explore how to increase the visibility of the work your office accomplishes.	1.0	1.0		
1.5 Hours 3:30-5:00 pm	Legislative Update	Attendees will hear the latest "behind the scenes" information on what is happening with Michigan legislation and its impact on municipalities and treasury offices.	.75	.75		
Breaks/Lunch/ Dinner Networking	Peer Networking	Take advantage of the support and insight from your peers on issues facing your office by networking during breaks and meals.	.8125			
Tuesday, May 17, 2022						
1.5 Hours 8:30-10:00 am	Importance of Investment Policy and Cautionary Tales of Over- or Under-Investing	This interactive session addresses the importance of strong financial policies by using real world examples from the front lines. Topics will include investment strategies, cash flow forecasting, investment reporting and bank earnings credits.	.75	.75		1.5



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1.75 Hours 10:15-12:00 pm	How to Run an Effective Office (Breakout by Municipal Size)	Participants will hear from their peers to share and learn tips to create an effective office environment. Grouping by municipality size will help support discussions on the benefits and challenges for similar-sized communities.	.875	.875		
2 Hours 1:00-3:00 pm	Economic Development	Learn more about all the different economic development tools, opportunities, and project-specific economic development incentives available to Michigan municipalities to attract redevelopment, retain employees, and level the playing field for challenging sites. This session will include tax increment financing authorities and how special tax rolls can strengthen the financial health of a community while diversifying the tax base, as well as incentives available for diverse project types. Learn how communities can leverage the economic development toolkit in creative ways to achieve their strategic goals.	1.0	1.0	2.0	
1 Hour 3:30-4:30 pm	ARPA Awards and Auditing Requirements	As communities begin to spend their American Rescue Plan Act (ARPA) awards, many will be required to have a single audit. In this session we will discuss what a single audit entails, how to prepare for one, and what communities should be doing prior to spending ARPA funds.	.5	.5	1.0	
½ Hour 4:30-5:00 pm	Treasurer-to-Treasurer Open Forum Discussion	Focused discussion on topical questions from attendees.	.25	.25		
Breaks/Lunch/ Dinner Networking	Peer Networking	Take advantage of the support and insight from your peers on issues facing your office by networking during breaks and meals.	.8125			
Wednesday, May 18, 2022						
1.5 Hours 8:30-10:00 am	Banking Solutions for Avoiding Fraud	This session will highlight ways your municipality can mitigate fraud risk. Ben and Lisa will draw on their years working in banking and managing client relationships to give a high-level overview of fraud trends, banking services to protect against fraud, and best practices you can use in your office.	.75	.75	1.5	
1.75 Hours 10:15-12:00 pm	Managing and Leading Great Staff & Team Meetings: Moving from Boring and Unproductive to Active and Engaged!	Closing Keynote speaker, Randy Dean will share proven strategies and best practices for making sure your meetings are more productive, more focused, and more appreciated. Use your meetings to solve problems, address issues, take advantage of opportunities, and effectively delegate and distribute work. Learn to make meetings into a powerful tool to build your team and organization!	.875	.875		