



2023 ADVANCED INSTITUTE

May 22 – 24 • Mt. Pleasant

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 2023 Advanced Institute.

There are a possible 10.0 MiCPT points / 10.0 CPFA points / 8.75 ACPFA.

| Instruction Time | Topic | Speaker/Description | MiCPT Points | CPFA Points | ACPFA Points |
|---------------------------------------|---|--|------------------|-------------|--------------|
| Monday, May 22, 2023 | | | | | |
| 1 Hour 8:30-9:30 am | Matt Booth, Keynote Speaker Basically Incredible | Attitude, communication, taking care of ourselves, having a plan, and having a source of power are basic things that done consistently, lead to incredible things. Basic doesn't mean easy, but it does mean worthwhile and effective. Are you ready to live a basically incredible life? | .5 | .5 | |
| 2 Hours 10:00 am-12:15 pm | Greg Thompson and Ray Marino, Livingston County Sheriff's Department ALICE Training | This active shooter response training will empower individuals to participate in their own survival in the gap between when a violent situation begins and when law enforcement arrives. The training is described as a proactive options-based response program that prepares civilians with life skills to increase survivability in the face of violence. The program also addresses the fallacies of a one-size-fits-all response plan by explaining the truths and realities of Violent Critical Incidents. | 1.125 | 1.125 | |
| 2 Hours 1:00-3:00 pm | Matt Booth Staying Positive in a Negative World | Your attitude determines your thoughts, actions and ultimately your success and growth. In the current environment, your attitude (and the attitude of those around you) needs to be positive as often as possible. This unique session will help you recognize the importance of a positive attitude and provide proven strategies to help improve the attitude within your organization. | 1.0 | 1.0 | |
| 2 Hours 1:00-3:00 pm | Stacy Belisle, McGraw Morris Human Resources Hot Topics | This class will address emerging topics in human resources law, including the Michigan legislature's amendment of the Elliott-Larsen Civil Rights Act to include LGBTQ categories of protection, how courts are applying case law relating to this new inclusion and how employers can take steps to protect the workplace and employees. We will also discuss issues relating to how to direct employees when there are leadership issues and how these circumstances may impact union employees. | CANCELLED | | |
| 1.5 Hours 3:30-5:00 pm | Judy Allen, MTA and Jennifer Rigterink, MML Legislative Update | Attendees will hear the updates 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. | 1.0625 | 1.0625 | |

| Tuesday, May 23, 2023 | | | | | |
|---------------------------------------|---|---|--------------|-------------|--------------|
| Instruction Time | Topic | Speaker/Description | MiCPT Points | CPFA Points | ACPFA Points |
| 1.5 Hours 8:30-10:00 am | Joe Snyder, Finance Director, City of Rochester Hills How Inflation Affects Treasurer Responsibilities | This presentation will focus on the various ways that inflation is impacting our lives both personally and professionally as Michigan Certified Professional Treasurers. Topics presented will focus on the current economic environment and some of the factors driving inflation, opportunities and challenges brought on in this inflationary environment, and ideas for Treasurers and Finance Directors on how to successfully financially manage your community through these unprecedented times. | .75 | .75 | 1.5 |
| 1.75 Hours 10:15-12:00 pm | Alex Brown, Plante Moran Cyber Security: Seven-Point Checklist | Are you working aggressively to protect your information systems and data, yet still unsure of the effectiveness of your security controls? The Seven-Point Cyber Security Checklist areas can shed light on how well you're protecting the confidentiality, availability, and integrity of your information and IT assets, as well as compliance with security and privacy regulations. | .875 | .875 | |
| 1 Hours 1:00-2:00 pm | Treasurer-to-Treasurer | This popular peer networking training is all about providing attendees with answers to topical questions on issues facing municipal treasury professionals and their municipalities. Learn from your peers on best practices and solutions to the challenges in today's changing environment. | .5 | .5 | |
| 1.5 Hours 2:00-3:30 pm | State of Michigan Treasury Department: Rachael Eubanks, Kevin Smith, and David Buick; and Kristin Angel, Michigan CLASS State Program Updates | This informative session will provide insight from the State of Michigan's Treasury Department including an Economic Update from State Treasurer, Rachael Eubanks, and important information the Veteran's Exemption, EMPP & ESA updates and small business taxpayer PP expansion and SIGMA (state software to improve budgeting processes, accounting activities, payments, receiving bids, and providing grant opportunities). | .75 | .75 | 1.5 |
| 1.25 Hours 3:45-5:00 pm | Jessi Zielinski-Veldhouse and Sara Eklove, All One Health Leadership vs. Management | There is a difference between leading a team and managing a team. Leaders are strategically focused. Rather than directing employees through tasks, strong leaders inspire and motivate employees to drive themselves. Leaders are adept in the art of emotional intelligence and apply it in a way that attains the best outcomes. One of the key characteristics of a manager is that they were given their authority by the nature of their role. They ensure work gets done, focus on day-to-day tasks and manage the activities of others. Join us to discuss these two philosophies and understand the benefits and challenges of both. | .625 | .625 | 1.25 |
| 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 | .8125 | |
| Wednesday, May 24, 2023 | | | | | |
| 2.5 Hours 8:30-11:00 am | Brad Russman, BS&A Advanced Report Writing | BS&A Report Designer session to cover mid-level/advanced topics commonly requested by users. Topics to include editing of tax bills, addition of logos/pictures/QR codes to reports, and introduction to creating custom reports. | 1.25 | 1.25 | 2.5 |