

2025 ADVANCED INSTITUTE

MAY 14-16 • COMFORT INN & SUITES • MT. PLEASANT



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 2025 Advanced Institute.

There are a possible 10.0 MiCPT points / 10.0 CPFA points / 7.75 ACPFA points

Instruction Time	Topic	Speaker/Description	MiCPT Points	CPFA Points	ACPFA Points
Wednesday, May 14					
8:30-9:30 am	FOIA in the Treasurer's Office	This session will go behind the scenes of Michigan law on FOIA requests providing a clear understanding of what is a public record, the 29 exemptions from disclosure, the rules of a FOIA request and more.	.5	.5	0.0
9:45-11:45 and 12:45-1:45	Adaptive Leadership and Team Culture	Creating a Culture of Belonging. This is a deep dive for leaders as they consider the impact they have on those around them. We will focus on getting clarity on who they are, what they have been carrying that they need to set down, and understanding the role of the First Follower. (The First Follower concept is often a big lightbulb moment!) The session will be interactive and will have people engaging in multiple ways. Attendees will walk away with lightbulb moments and tangible action items. Phase II will focus on the Stages of Team Development, which helps leaders identify where their team is and how they can help them move forward.	1.5	1.5	3.0
2:00-3:00 pm	BREAKOUT: BS&A Cloud or BS&A Financial Module	Attendees will choose one of the two breakouts: BS&A Cloud will provide insight from peers on Pre-Cloud migration, the implementation experiences, the difference between .net and Cloud and the end results from the conversion. The BS&A Financial module breakout will offer a live demonstration on all aspects of this important financial module on setting up the general ledger for success.	.5	.5	0.0
3:15-4:45 pm	Funding Major Projects and Capital Campaigns	This session will provide insight on the types of borrowing to fund major projects and capital campaigns, including municipal bonds, the type of bonds that can be issued by municipalities, the parties to municipal bond transactions and the key features and complexities of municipal bond transactions.	.75	.75	1.5
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.	1.0	1.0	0.0

Thursday, May 15					
Instruction Time	Topic	Speaker/Description	MiCPT Points	CPFA Points	ACPFA Points
8:30-9:45 am	Top 10 Cyber-Technology Frauds in Michigan	This presentation will provide an in-depth look of the top 10 financial and cyber-enabled crimes being experienced in Michigan. Presenters will focus on how to identify and respond to these scams, in addition to providing training on the latest in counterfeit currency and digital assets.	.625	.625	1.25
10:00 am-Noon	Public Presence as a Public Official and How to Work with Boards & Councils	As leaders in our communities and custodians of citizens' funds it is our responsibility to lead and guide our boards/councils with professionalism, care and integrity. We must also be attentive to public perception and its impact on our ability to effectively lead and be part of a team. This session will address key issues that public officials face today and the challenges that social media platforms create.	1.0	1.0	2.0
1:00-3:00 pm	Investment Policy Best Practices	Michigan Law, Public Act 20, requires a governing body to have an investment policy. This session will emphasize the importance of not just having a policy but regular reviews, updates and best practices in defining objectives around safety, diversification, liquidity and return.	1.0	1.0	0.00
3:14-4:15 pm	Treasurer-to-Treasurer	There is no better way to learn than asking direct questions about topics you are most concerned with and having a room full of your peers to offer guidance and support.	.5	.5	0.00
Breaks/Lunch/Networking	Peer Networking	Take advantage of the support and insight from your peers on issues facing your office by networking during breaks and meals.	1.0	1.0	0.00
Friday, May 16					
Instruction Time	Topic	Speaker/Description	MiCPT Points	CPFA Points	ACPFA Points
8:30-10:30 am	Legislative Update	Attendees will hear the updates on what is happening with Michigan legislation and its impact on municipalities and treasury offices.	1.0	1.0	0.00
10:45 am-Noon	P-3 Funding: Public Private Partnerships	This engaging session will provide examples of successful and diverse partnerships between Funders (Community Foundation and United Way) and Municipalities in Kalamazoo County. The speakers, leaders from the City of Kalamazoo, Kalamazoo Community Foundation, Kalamazoo County and the United Way of South Central Michigan, will provide insight on innovative collaborations spanning small business loans and grants, opioid settlement grantmaking, disaster response, Rx Kids cash prescriptions, support for unhoused individuals and more.	.625	.625	0.00