



2020 Advanced Institute Fall/Winter Online Education

Point Tally Sheet

Circle the points you earned from the 2020 MMTA Advanced Institute and total here: _____

There are a possible 10 MiCPT points, 9.5 CPFA points and 10.5 ACPFA points for this event

Instruction Time	Topic/Speaker	Description	MiCPT/ CPFA Points	ACPFA Points
1 Hour	Treasurer-to-Treasurer Panel Discussion	Updates and networking on how peers are confronting hot topics affecting municipalities.	.5	
1.5 Hours	Legislative Impact on Treasurers, Eric Scorsone, Associate Professor & Director, MSU Extension Center for Local Government Finance & Policy	Includes a discussion on the impact of the CARES Act as well as cash management challenges and strategies caused by the impacts of the pandemic.	.75	
3 Hours	APT US&C Internal Controls Certificate Program, Michael Pettigrew, ACPFA, ACPFIM, CTP, MiCPT, Treasurer, City of Ann Arbor, President of APT US&C	Program will assist treasury and finance personnel in assessing, documenting and enhancing their internal control environment; learn how to develop an internal control policy and utilize internal control checklists to draft narratives and flowcharts that outline your entity's control environment.	1.5	
2 Hours	Investment Strategies in A Crisis, Panel: Susan Daugherty, Treasurer, Green Oak Charter Township, moderator; Kristin Angel, Michigan CLASS; Kim Goethe, Flagstar Bank; Mike Kloack, Meeder Investments	Learn more about municipal investments, especially the current conditions and how they are affecting your investment options. The panelists will discuss the changes and unpredictability of the last nine months so attendees can effectively assess their position and consider investment opportunities and risks during these uniquely challenging times.	1.0	2.0
1.5 Hours	Operations in A Crisis: What We've Learned From A National Pandemic, Panel: Laurie Sheldon, CPFA, CPFIM, MiCPT, Treasurer, City of Kentwood, MMTA Secretary, moderator; Rose Dillon, MiCPT, Fruitport Township; Anthony Moggio, MiCPT, ACPFIM, Finance Director/Treasurer, City of Rochester; Michael Pettigrew, ACPFA, ACPFIM, CTP, MiCPT, Treasurer, City of Ann Arbor	As awful as the pandemic has been, there have also been many changes we've had to make that we can – and should – learn from. This in-depth discussion presented by Treasurers of all different sized communities will focus on the lessons we've learned that you can use to further strengthen your department and community. We'll focus on (and take a deep dive into) disaster preparedness, staffing, collections, fiscal oversight, cash flow, and budgeting.	.75	1.5

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Instruction Time	Topic/Speaker	Description	MiCPT/ CPFA Points	ACPFA Points
2 Hours	Internal Politics of Government and how to Resolve, <i>Susan Radwan</i>	Internal politics exist in just about every workplace setting, but working in a municipality often means you're surrounded by politics, presenting a sizable challenge to your effectiveness and success. Learn methods to combat internal politics and help you and your office run smoothly while providing customers with the best service possible.	1	2.0
1.5 Hours	Communicating Critical Issues to Challenging Audiences, <i>Susan Radwan</i>	Learn in depth methods to help you communicate, even when you have to explain the finer points of an issue to a person or group who just don't seem to be speaking the same language. Hear great insights and ideas on how to shift gears and get even the most challenging audience to receive the message you need to deliver.	.75	1.5
2 Hour	Cash Handling in a Changing World, <i>John Globensky, MiCPT, CPFIM, Treasurer, City of Grand Rapids</i>	There only used to be one way to pay for anything: cash. But our world has gotten smaller and faster and the pandemic has forced municipalities to truly get imaginative to create solutions that provide the necessary services to our residents while staying safe. Have these transitions created a permanent model? This is an in depth look at how treasurers can take an advanced approach to fully implement new cash handling solutions necessitated by pandemic-related restrictions.	1	2.0
1 Hour	Treasurer-to-Treasurer Panel Discussion	Updates and networking on how peers are confronting hot topics affecting municipalities.	.5	
1.5 Hours	Economic Update, <i>Jim Glassman, Managing Director of JP Morgan Chase & Co. and Head Economist for Chase Commercial Banking</i>	From regulations and technology to globalization and consumer habits, you'll find that Jim's insights will help you better understand the changing economy and its impact on your responsibilities. This session includes a review of the principal forces shaping the economy and financial markets, and how the current status will affect our near future.	.75	1.5
2 Hours	Legislative Update, <i>Judy Allen, Legislative Affairs Director, MTA; Chris Hackbarth, Director of State and Federal Affairs, MML</i>	Learn the latest from "behind the scenes" on what is happening with Michigan legislation and its impact on municipalities and treasury offices, including the effect of election and lame-duck activities as well as pandemic-related legislation.	1	
	Peer-to-Peer Learning		.5*	

* Peer-to-Peer Learning only applies to MiCPT points, not CPFA points.

MiCPT: Michigan Certified Professional Treasurer (certified by MMTA)

CPFA: Certified Public Finance Administrator & ACPFA: Advanced CPFA (certified by APT US&C)