

MMTA 2022 FALL CONFERENCE

CRYSTAL MOUNTAIN
SEPTEMBER 18-21



MiCPT and CPFA-ACPFA POINT TALLY SHEET

MiCPT - Michigan Certified Professional Treasurer

CPFA - Certified Public Finance Administrator and ACPFA – Advanced Certified Public Finance Administrator;

Use this sheet to keep track of education points from sessions you attended at the Conference.

There are a possible 7.875 MiCPT Points; 7.875 CPFA points; 7.5 ACPFA.

| Instruction Time | Speaker & Topic | Description | MiCPT Points | CPFA Points | ACPFA Points |
|-----------------------------------|--|---|--------------|-------------|------------------------------|
| Monday, September 19, 2022 | | | | | |
| 8:45-10:15 pm | OPENING KEYNOTE: Dangerous Individual Recognition Training (D.I.R.T.) | Empowering employees with the ability to stay safe and recognize a dangerous person or situation doesn't have to be stressful! Terry delivers advanced personal safety training by focusing on body language, mindset, and strategy. These workshops are interactive, entertaining, and designed to negate fear and anxiety. In addition to improving employee safety on and off the clock, it also improves teamwork, communication, responsibility, attention to detail, and emotional intelligence for employees throughout an organization. | .75 | .75 | |
| 10:45 am-Noon | 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. | .625 | .625 | |
| 1:30-3:00 pm | Best Practices for Recruitment and Retention | Attendees will learn about best practices for employers to consider during the most challenging employment landscape of our lives. Attracting and retaining employees amid the post-pandemic, "Great Resignation" landscape requires employers to re-think their HR strategy and how they communicate with their employees. Attendees will leave this session with information and motivation for HR-related initiatives they can implement now. | .75 | .75 | |
| 3:30-5:00 pm | BREAKOUTS (3) Investing in Today's Market <ul style="list-style-type: none"> • Beginners • Intermediate • Advanced | <u>Beginners:</u> Basic introduction of the How, What, Where, and Why of Municipal Investing 101. <u>Intermediate:</u> This session will cover the fundamentals of investment best practices, and cash flow analysis as a basic for investment strategy. <u>Advanced:</u> "So, a banker, investment manager, and a treasurer walk into a bar..." What is the punchline? No punchline as it's a rhetorical question. Each one offers their professional experience, wisdom, and ideas for supporting treasury operations and investments. Through this meeting of the minds, we will be discussing support for treasury operations, the ever-changing shape-shifting yield curve, and a potential change to Public Act 20. | .75 | .75 | 1.5 Advanced Session Only |

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| Instruction Time | Topic | Description | MiCPT | CPFA | ACPFA |
|--------------------------------------|---|---|-------|------|-------|
| Tuesday, September 20, 2022 | | | | | |
| 8:30-10:00 am | BS&A Tax and Financial Management Module Training | This training will focus on tips and tricks dealing with BS&A's property modules and financial management solutions. Also covered will be advanced features within general ledger and cash receipting. Includes a brief overview on the benefits of Cloud solutions. | .75 | .75 | 1.5 |
| 10:30 am – Noon | BREAKOUTS (2) Treasurer-to-Treasurer <ul style="list-style-type: none"> Populations Under 50,000 Populations over 50,000 | 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. Attendees will be divided by population size of their communities. | .75 | .75 | |
| 1:00-2:00 pm | Assessment-Collection-Settlement How They All Work Together | Attendees will hear first hand on the importance of how assessment, collection and the settlement process all works hand-in-hand. From creating the tax roll, to preparing the warrant to the popular "settlement season." | .5 | .5 | |
| 2:15-3:15 pm | Economic Update | The presentation will discuss the current global and domestic economic conditions while focusing on key datapoints and/or trends that may be developing. Included in this will be some economic statistics specific to the state of Michigan. Throughout the presentation, Chad will also be touching on how the prevailing economic conditions are shaping investment markets in the U.S. and around the world. | .5 | .5 | 1.0 |
| 3:30-5:00 pm | Disaster Preparedness | During an emergency or disaster what resources are available to your community? How do you access them? What is your role? And how can you plan ahead to make sure you are ready? During this presentation we will discuss real events and outcomes to both national and local disasters, how they prepared and outcomes to their preparedness. | .75 | .75 | |
| Wednesday, September 21, 2022 | | | | | |
| 8:30 am – Noon | Body Language Workshop and Advanced Instruction on Dangerous Individual Recognition Training | On average, we will meet 80,000 people in our lifetime! That's 80,000 opportunities for either a good or bad interaction. Yet, body language is often the most overlooked and under-appreciated means through which we make a connection, inspire change, or positively impact other people. Mastering Body Language for Leaders will provide a framework of strategies to improve nonverbal interpretation and ensure that every communication is a success. Terry will also take us to the next level of the D.I.R.T. Training. | 1.75 | 1.75 | 3.5 |