

2012



MMTA BASIC INSTITUTE • April 22 - 27, 2012

MMTA ADVANCED INSTITUTE • May 2 - 4, 2012

michigan municipal treasurers institute

January 2012

Dear Treasury Professional:

The heart of the mission for the MMTA is to provide our membership with the tools needed to meet the diversified challenges facing them by offering education, services, continuing professional development and ethical standards. With that in mind, the MMTA Board, Education Committee and Professional Development Committee are pleased to invite you to attend the Michigan Municipal Treasurers Association Basic and Advanced Institutes.

Both Institutes meet the accreditation requirements for education points for state and international certifications: Michigan Certified Professional Treasurer (MiCPT), Certified Public Finance Administrator (CPFA), and Advanced Certified Public Finance Administrator (ACPFA).

- **MMTA Basic Institute – April 22 through April 27, 2012**

Basic Institute is designed to enhance the overall job performance of the treasurer in small and large municipalities and is required for treasurers seeking the MiCPT certification, and recommended for those seeking the CPFA certification.

- **MMTA Advanced Institute – May 2 through May 4, 2012**

The program is designed to further the professional development of the treasurer in performing more complex duties and meets the requirements for treasurers seeking to renew the MiCPT, and those seeking or renewing the CPFA or ACPFA certifications.

This will be the third year the Basic and Advanced Institutes will be conducted as separate events. This format has been a great success for the MMTA and our goal is to continue exceeding expectations by providing quality education at all levels. The MMTI offers basic education to those new to the treasury profession as well as advanced education and professional development to the more experienced treasurers seeking certification or recertification.

Both Basic and Advanced Institutes will be held at the Comfort Inn Hotel and Conference Center located on the campus of CMU in Mt. Pleasant.

Please review the information included in this document carefully and note that payment must accompany the registration form and it must be postmarked on or before the deadline to avoid the late fee of \$50.00. MMTA membership is required for both the Basic and the Advanced Institutes. Remember the Advanced Institute is only available for MMTA members who have completed the three-year Basic Institute.

The schedules for both Basic and Advanced Institutes will be finalized and posted on the website along with other updates including a list of members who are registered for the Institute. Be sure you include your email address on the registration form in order to receive regular updates.

On behalf of all the members of the MMTA Board of Directors and the Education and Professional Development Committees, it is our pleasure to encourage you to plan to enjoy an educational experience you will never forget.

Please refer questions about the Institute to the Program Coordinator, Mary Bender, at 231-797-5536 or contact her via email at mbender102@aol.com.

Sincerely,

*Barbara Fandell*

Barbara Fandell  
Clerk-Treasurer, CPFA, MiCPT  
City of Ithaca  
MMTA Education Committee Chairperson

Kim McKay  
Treasurer, MiCPT  
City of Rockford  
Professional Development Committee Chair



[www.mmta-mi.org](http://www.mmta-mi.org)

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## registration

The registration form that is posted on the website is set up in an interactive PDF format that allows you to enter the information right on the form. Payments may be made by check or credit card. See the registration form for additional details about registration.

Scholarships are available if fees present a problem. To see if you qualify, contact Barbara Fandell at [bfandell@ithacami.com](mailto:bfandell@ithacami.com).

Cancellations must be made in writing and emailed or postmarked before April 6 for Basic Institute and April 18 for Advanced Institute. No refunds will be given for cancellations made after the deadline. Sorry, no exceptions. The registration fee can be transferred to another person in your organization at any time.

### BASIC INSTITUTE - \$550



- Includes classes and materials
- All break snacks and beverages
- Lunch Monday, Tuesday and Thursday
- Dinner Sunday and Thursday
- Attendance is required at all sessions
- MMTA membership is required
- Registration deadline April 6, 2012

### ADVANCED INSTITUTE - \$325



- Includes all classes and materials
- All break snacks and beverages
- Lunch on Wednesday and Thursday
- Advanced Institute is only offered to those people who have completed the three year Basic Institute
- Registration deadline April 18, 2012

## college credit

College credit will be offered by Central Michigan University. Lewis Bender will serve as the instructor of record in an independent study format at either the undergraduate or graduate level for completion of each year of the Basic Institute. More information will be available at the beginning of the Institute. In the meantime, you can find additional information on the MMTA website <http://mmta-mi.org/education>.

## accommodations

A block of rooms has been reserved for the MMTA Basic and Advanced Institute participants until April 9, 2012.

### COMFORT INN

2424 South Mission  
Mt. Pleasant, MI 48858  
989-772-4000  
[www.mtpcomfortinn.com/location.aspx](http://www.mtpcomfortinn.com/location.aspx)

*Note: The Comfort Inn does not have elevators. If you cannot walk upstairs, please be sure to request a room on the ground floor.*

### FAIRFIELD INN

2525 University Park Drive  
Mt. Pleasant, MI 48858  
989-775-5000  
[www.marriott.com/hotels/travel/mbsmp-fairfield-inn-and-suites-mt-pleasant/](http://www.marriott.com/hotels/travel/mbsmp-fairfield-inn-and-suites-mt-pleasant/)

*Note: The Fairfield does have an elevator and it is a short walk across the parking lot to the conference center.*

### \$75.00 PER NIGHT

Please contact one of these hotels and indicate that you are attending MMTA Basic or Advanced Institute. Be sure to provide your agency's tax-exempt number to avoid the state taxes on the lodging cost.

Double occupancy is available and both hotels will split the bill for lodging.

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## basic curriculum

The Basic Institute is a three-year program which is specifically designed around the training that is essential for treasurers. The courses will meet the certification requirements that are being developed by the MMTAs as well as those prescribed by the Association of Public Treasurers of the United States and Canada (APT US&C). The course is divided into three one-week sessions. The sessions are non-sequential so one may begin the three-year basic cycle at any time. Attendance is required at all sessions in order to qualify for a certificate of completion, certification points or college credit. Please do not register for the Institute if you cannot attend all sessions. The schedule along with other updates will be posted on the MMTA website as soon as the details are finalized. [www.mmta-mi.org](http://www.mmta-mi.org)

## advanced curriculum

The Advanced Institute curriculum promises to be a dynamic program that provides advanced instruction to meet the needs of experienced treasurers. The program will meet MMTA and APT US&C requirements for recertification. The schedule will be posted on the MMTA website in the near future.

## links

### MICHIGAN MUNICIPAL TREASURERS ASSOCIATION

[www.mmta-mi.org](http://www.mmta-mi.org)

### CPFA INFORMATION

[www.apтусc.org/accreditations/cpfa](http://www.apтусc.org/accreditations/cpfa)

### MMTA MEMBERSHIP INFORMATION

[www.mmta-mi.org/membership](http://www.mmta-mi.org/membership)

### COMFORT INN

[www.mtpcomfortinn.com](http://www.mtpcomfortinn.com)

### FAIRFIELD INN

[www.marriott.com/hotels/travel/mbsmp-fairfield-inn-and-suites-mt-pleasant/](http://www.marriott.com/hotels/travel/mbsmp-fairfield-inn-and-suites-mt-pleasant/)

## 2012 basic curriculum

- *Principles of Public Finance*
- *Governmental Accounting*
- *Internal Controls*
- *Ethics & the Treasurer*
- *State Laws & Regulations*
- *Political Science*
- *Oral Communications*

## 2013 basic curriculum

- *Investment Policy & Reporting*
- *Personal Property Tax Collections*
- *Creative Problem Solving & Decision Making*
- *Cash Handling*
- *Records Management*
- *Legislative Update*
- *Challenges Facing Treasurers*

## 2014 basic curriculum

- *Debt Management*
- *Financial Reporting*
- *Public Budgeting*
- *Technology*
- *Public Relations*
- *Personnel Management*
- *Organizational Development*
- *Goals & Strategies for the Treasury Department*

## 2012 advanced curriculum

- *Best Practices in Coping with Change*
- *Changes in Lansing & Effects on Local Government*
- *Human Resources Hot Topics*
- *Business Writing*
- *Leadership Styles*
- *Organizational Culture*



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## registration form

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Title: \_\_\_\_\_ Organization: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_

State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_ Is this your first MMTA Event? Yes \_\_\_\_\_ No \_\_\_\_\_

Cancellations must be made in writing and emailed or postmarked before April 6th for Basic and April 18th for Advanced.  
No refunds will be given for cancellations made after the deadline.

If you have any questions regarding the Institutes,  
please contact Program Coordinator, Mary Bender, at mbender102@aol.com

**BASIC INSTITUTE - \$550**  
**April 22 through April 27, 2012**

BASIC INSTITUTE

Year 1: \_\_\_\_\_ Year 2: \_\_\_\_\_ Year 3: \_\_\_\_\_

Please indicate first, second, or third year. Available only to  
MMTA members. Membership forms are available at  
[www.mmta-mi.org/membership](http://www.mmta-mi.org/membership).

**REGISTRATION DEADLINE IS APRIL 6, 2012**

**ADVANCED INSTITUTE - \$325**  
**May 2 through May 4, 2012**

YEAR COMPLETED BASIC INSTITUTE

\_\_\_\_\_

Available only to MMTA members who have  
completed 3 years of Basic.

**REGISTRATION DEADLINE IS APRIL 18, 2012**

## payment information

Credit Card # \_\_\_\_\_ Expiration Date: \_\_\_\_\_  
*(Visa and Master Card only)*

Name as it appears on Card: \_\_\_\_\_

Zip Code: \_\_\_\_\_ 3 Digit Code: \_\_\_\_\_



[www.mmta-mi.org](http://www.mmta-mi.org)

**PLEASE MAKE CHECKS PAYABLE TO:**  
**michigan municipal treasurers association**

C/O Bruce Malinczak  
P.O. Box 87156 • Canton, MI 48187

Please note that a \$50 late charge is added for registrations postmarked after the deadline.  
Please do not fax registration materials. Scanned registration forms will be accepted if accompanied  
by Credit Card information.

MMTA Tax ID number is: 38-3023792