



Basic Institute Schedule • April 15 - 20

Sunday, April 15

3:00 pm - 7:00 pm
Institute Registration, Stadium Room

4:00 pm
Hotel Check-In

5:30 pm - 7:30 pm
First Year Mandatory Orientation, Conference Center
Mike Pettigrew, Facilitator
Rachel Piner, Education Chair
Levi Boldt, Class of 2018
Shelley Buresh & Janel Walmsley, Association Managers

Dinner
Deluxe Salad Bar
Penne & Cavatappi Pasta with Alfredo and Marinara Sauces
Grilled Chicken Strips, Parmesan Cheese, Garlic Breadsticks
Brownies

Welcome to MMTA Basic Institute



INTRODUCTIONS

Rachel Piner

MMTA Education Chair

Mike Pettigrew

Institute Facilitator

Levi Boldt

3rd Year Class Representative

Shelley Buresh & Janel Walmsley

Association Managers



MMTA: Who We Are and What We Do

- A not-for-profit organization for treasury professionals
 - ✓ More than 800 members
 - ✓ Municipal members & associate members
- Governed by a 12 member Board of Directors
 - ✓ Supported by eight Committees
- Dedicated to providing a forum for its members to exchange ideas and concepts
 - ✓ Training conferences, listserv, MMTA website, etc.



MMTA Objectives

- MMTA is committed to supporting the growth and development of its members through:
 - ✓ **Networking, Education and Training**
 - ✓ Basic & Advanced Institutes
 - ✓ Fall Conference – Annual Meeting
 - ✓ Winter Workshop
 - ✓ MMTA in the UP
 - ✓ Day Seminars



MMTA Objectives

- **MMTA is committed to supporting the growth and development of its members through:**
 - ✓ **Relationships**
 - ✓ Central Michigan University (CMU)
 - ✓ Michigan Municipal League (MML)
 - ✓ Michigan Township Association (MTA)
 - ✓ Assoc. of Public Treasurers of the US & Canada (APT US&C)
 - ✓ Michigan Government Finance Officers Assoc. (MGFOA)
 - ✓ Michigan Association of County Treasurers (MACT)
 - ✓ Northern Michigan Public Service Academy



Making the Most of Your MMTA Membership

- **Know Your Organization**
 - ✓ www.mmta-mi.org
- **Get Connected**
 - ✓ **Listserv**
- **Invest in Yourself**
 - ✓ **Training**
 - ✓ **Certifications (MiCPT, CPFA, ACPFA)**
- **Connect with Others**
 - ✓ **The best resource is your peers!**



“How to get the most out of your Institute Experience...”



Levi Boldt

2018 Basic Institute Graduate



In the Next 5 Minutes

- Find 3 people who work in the same form of government (City, township, village, county)
- Find 2 other people who came into their position in the same fashion (Elected, appointed, hired)
- Find the 1 person who is the closest to you geographically



The Basics of Basic

- Name badges and pocket schedule
- Presentation materials
 - ✓ Binders/electronic
 - ✓ Schedules, menus, presentations, speaker info
- Attendance, seating, tent cards
- Meals and breaks
- Evaluations



Institute Objectives

- Education Committee
- Institute Curriculum and MiCPT Certification
- Learn from experts in their fields
 - ✓ Line up of 18 speakers who will share practical education and real life experiences for your benefit
- Take back and share your new found knowledge with your municipality
- Meet, reacquaint, and network with your peers
 - ✓ Lifelong friends and professional resources
- Giving Back



2018 Institute Charity

Special Olympics Michigan

The mission of Special Olympics Michigan is to provide year-round sports training and athletic competition for children and adults with intellectual disabilities. Athletes develop physical fitness, demonstrate courage and experience joy while participating in the sharing of gifts, skills and friendship among their families, Special Olympics athletes and the community.

- 27,745 athletes
- 24 sports are offered
- 6 state-level competitions, 4 district basketball tournaments and more than 700 local and regional competitions statewide
- 32,867 volunteers
- 3,278 active certified coaches
- A 501(c)(3) non-profit organization supported almost entirely through corporate funding and individual gifts



Facilitating Your Learning

My Role as Institute Facilitator

- ✓ Guide and support an effective learning environment.
- ✓ Encourage individual and group participation; learn from those around you.
- ✓ Provide office hours at the end of each day to answer questions.
- ✓ Teach (I will be one of your topic experts on Thursday providing 4 hours of Cash Management training)



My Role as Institute Facilitator

- ✓ Alleviate worries about Thursday's team building exercise.
- ✓ Encourage you to take advantage of all networking opportunities.
- ✓ Ensure understanding of Institute's 3-year curriculum

EDUCATION TOPIC	100 HOURS OF INSTRUCTION	YEAR ONE HOURS	YEAR TWO HOURS	YEAR THREE HOURS
Principles of Public Finance	6	4		2
Government Accounting	4	4		
Cash Management/Banking Relations	10	6		4
Investing in Public Funds	6	4	2	
Debt Management	6	2		4
Internal Controls/Fraud Detection	4		4	
Ethics and the Treasurer	6		6	
State Laws and Regulations	4		4	
Financial Reporting	4		4	
Revenue Collections	4		4	
Records Management	2			2
Public Budgeting	6			6
Technology	4			4
Disaster Preparedness	4	4		
Office Procedures	2		2	
Written Communications	4	4		
Political Science	2		2	
Oral Communications	3		3	
Public Relations	3			3
Personnel Management	6	2		4
Organizational Development	2			2
Problem Solving	2	2		
Peer Knowledge Sharing	6	2	2	2

Basic Institute 3-Year Curriculum



Handout Exercise

- What are some good things you have heard about institute?
- Is there anything about institute that concerns or worries you?
- What are your expectations for this week?



Building professional relationships that last throughout your career begins now...



Questions and Comments

