



Basic Institute Schedule • April 15 - 20

SUNDAY, APRIL 15

3:00 pm - 7:00 pm	Institute Registration
4:00 pm	Hotel Check-In
5:30 pm - 7:30 pm	First Year Mandatory Orientation and Dinner (attendance not required for 2nd & 3rd year students) (Mike Pettigrew, Rachel Piner, Levi Boldt, Shelley Buresh & Janel Walmsley)

MONDAY, APRIL 16

7:30 am - 9:00 am	Institute Registration
7:30 am - 9:00 am	Breakfast*
9:00 am - 9:30 am	Welcome & What to Expect at Institute (Mike Pettigrew, Facilitator)
9:30 am - 11:30 am	Leadership Styles (Sherene McHenry, PhD)
11:30 am - 12:30 pm	Lunch*
12:30 pm - 2:30 pm	Effective Communication (Sherene McHenry, PhD)
2:45 pm - 5:00 pm	Debt Management (Tom Traciak & Andy Campbell, Umbaugh & Associates)
5:00 pm - 5:30 pm	Office Hours (Mike Pettigrew, Facilitator)
5:30 pm - 7:00 pm	Dinner* (Conference Center, Rooms B-C-D)
7:00 pm - 10:00 pm	Social Networking & Game Night* (Stadium Room/Hotel Lobby)

TUESDAY APRIL 17

7:00 am - 8:00 am	Breakfast*
8:00 am - 9:45 am	Budgeting, Financial Reporting & Audit (William Brickey, Plante Moran)
9:45 am - 10:30 am	Investment Basics (Michael Barry, PFM)
10:45 am - Noon	Capital Planning & Debt Financing (Nate Watson, PFM & Jeff Aronoff, Miller Canfield)
Noon - 1:00 pm	Lunch & MMTA 101 (Rachel Piner)
1:00 pm - 2:15 pm	Investing in Term Products (Ben Stone, Flagstar Bank)
2:15 pm - 3:45 pm	Investing in Pools & PA-20 Compliant Products (Rich Garay & Kristin Angel, Michigan CLASS)
3:45 pm - 5:00 pm	Investing in Securities (Greg Prost, Robinson Capital)
5:00 pm - 5:30 pm	Office Hours (Mike Pettigrew, Facilitator)
5:30 pm - 7:00 pm	Dinner* (Conference Center, Rooms B-C-D)
7:00 pm - 10:00 pm	Social Networking & Game Night* (Stadium Room/Hotel Lobby)

WEDNESDAY APRIL 18

7:00 am - 8:00 am	Breakfast*
8:00 am - Noon	Disaster Preparedness as it Relates to Municipalities (Marc Griffis, Isabella County)
Noon - 1:00 pm	Lunch*
1:00 pm - 3:00 pm	Uniform Chart of Accounts & Audit Relationships (Barb Fandell, City of Ithaca, Mary Ann Kornexl, City of Mt. Pleasant)
3:15 pm - 5:00 pm	Audit Requirements & What to Expect (Peter Haefner, Vredeveld Haefner)
5:00 pm - 5:30 pm	Office Hours (Mike Pettigrew, Facilitator)
	~ Dinner on Your Own ~
7:00 pm - 10:00 pm	Social Networking & Game Night* (Stadium Room/Hotel Lobby)

THURSDAY APRIL 19

7:00 am - 8:00 am	Breakfast*
8:00 am - Noon	Introduction to Cash Handling (Mike Pettigrew & John Globensky, City of Grand Rapids)
Noon - 1:50 pm	Team Building & Working Lunch
2:00 pm - 4:00 pm	Principles of Managing Receipts (John Globensky, City of Grand Rapids & Mike Pettigrew)
4:00 pm - 4:30 pm	Office Hours (Mike Pettigrew, Facilitator)
5:30 pm - 6:30 pm	Reception* (Conference Center, Rooms B-C-D)
6:30 pm - 8:30 pm	Dinner and Awards Ceremony*

FRIDAY APRIL 20

7:00 am - 8:00 am	Breakfast*
8:00 am - 10:00 am	Effective Written Communications (Laurie Sheldon, City of Kentwood)
10:00 am - Noon	Problem Solving & Personality Style (Lynn Hoerauf, MA)
Noon - 12:15 pm	Applying What We've Learned (Mike Pettigrew, Facilitator)
	~ Lunch on Your Own ~ Safe Travels Home!

*Asterisked items are optional and are not required for graduation - but we hope to see you at these meals and activities!



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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



Basic Institute Schedule • April 15 - 20

Monday, April 16

7:30 am - 9:00 am

Institute Registration, Conference Center

7:30 am - 9:00 am ~ Breakfast

Scrambled Eggs, Hickory Smoked Bacon, Potatoes,
French Toast, Assorted Seasonal Fruit

9:00 am - 9:30 am

Welcome & What to Expect at Institute

Mike Pettigrew, Facilitator

9:30 am - 11:30 am

Leadership Styles

Sherene McHenry, PhD

11:30 am - 12:30 pm ~ Lunch

Seasoned Beef, Grilled Chicken, Cheddar Refried Beans, Spanish Rice, Tortillas,
Taco Shells, Tortilla Chips with Nacho Cheese, Shredded Lettuce, Diced Onion and
Tomato, Jalapenos, Shredded Cheddar Cheese, Sour Cream, Salsa, Guacamole

12:30 pm - 2:30 pm

Effective Communications

Sherene McHenry, PhD

2:30 pm

Potato Chips & Dip, Deluxe Party Mix, Assorted Cookies

2:45 pm - 5:00 pm

Debt Management

Tom Traciak & Andy Campbell, Umbaugh & Associates

5:00 pm - 5:30 pm

Office Hours

Mike Pettigrew, Facilitator

5:30 pm - 7:00 pm ~ Dinner (Rooms B-C-D)

Deluxe Salad Bar, Dinner Rolls, Cottage Cheese, Grilled Pineapple Chicken, Bourbon
Glazed Ham, Rice Pilaf, Honey Ginger Carrots, Warm Apple Crisp

7:00 pm - 10:00 pm

Social Networking & Game Night, Stadium Room
(Cash bar or bring your own beverage)

Note: menus are provided for your convenience but may change without notice



Basic Institute Schedule • April 15 - 20

Tuesday, April 17

7:00 am - 8:00 am ~ Breakfast

Scrambled Eggs, Potatoes, Hickory Smoked Bacon,
Buttermilk Biscuits & Sausage Gravy, Fresh Cut Fruit

8:00 am - 9:45 am

Budgeting, Financial Reporting & Audit
William Brickey, Plante Moran

9:45 am - 10:30 am

Investment Basics
Michael Barry, PFM

10:45 am - Noon

Capital Planning & Debt Financing
Nate Watson, PFM & Jeff Aronoff, Miller Canfield

Noon - 1:00 pm

Lunch & MMTA 101

Deluxe Salad Bar with Grilled Chicken, Choice of Two Soups
Potato Salad, Fruit Salad, Dinner Rolls

1:00 pm - 2:15 pm

Investing in Term Products
Ben Stone, Flagstar Bank

2:15 pm - 3:45 pm

Investing in Pools & PA-20 Compliant Products
Rich Garay & Kristin Angel, Michigan CLASS

3:45 pm

Warm Soft Pretzels with Assorted Mustards, Roasted Mixed Nuts,
Tortilla Chips and Warm Queso Dip

3:45 pm - 5:00 pm

Investing In Securities
Greg Prost, Robinson Capital

5:00 pm - 5:30 pm

Office Hours ~ *Mike Pettigrew, Facilitator*

5:30 pm - 7:00 pm ~ Dinner (Rooms B-C-D)

Deluxe Salad Bar, Dinner Rolls, Italian Pasta Salad, Meatloaf, Chicken Parmesan,
Garlic Mashed Potatoes, Sweet Corn, Assorted Cakes

7:00 pm - 10:00 pm

Social Networking & Game Night, Stadium Room
(Cash bar or bring your own beverage)



Basic Institute Schedule • April 15 - 20

Wednesday, April 18

7:00 am - 8:00 am ~ Breakfast

Bagels with Cream Cheese, Yogurt and Granola, Fresh Cut Fruit,
Oatmeal with Assorted Toppings

8:00 am - Noon

Disaster Preparedness as it Relates to Municipalities
Marc Griffis, Isabella County

Noon - 1:00 pm ~ Lunch

Caesar Salad, Toasted Garlic Parmesan Bread, Four Cheese Meat Lasagna,
Chicken Mushroom Marsala, Sauteed Vegetable Blend

1:00 pm - 3:00 pm

Uniform Chart of Accounts & Audit Relationships
Barb Fandell, City of Ithaca & Mary Ann Kornexl, City of Mt. Pleasant

3:00 pm

Cheese & Crackers, Cookies

3:15 pm - 5:00 pm

Audit Requirements & What to Expect
Peter Haefner, Vredevelt Haefner

5:00 pm - 5:30 pm

Office Hours

Mike Pettigrew, Facilitator

~ Dinner On Your Own ~

7:00 pm - 10:00 pm

Social Networking & Game Night, Stadium Room
(Cash bar or bring your own beverage)



Basic Institute Schedule • April 15 - 20

Thursday, April 19

7:00 am - 8:00 am ~ Breakfast

Build Your Own Breakfast Burrito: Tortillas, Scrambled Eggs, Sausage, Potatoes, Shredded Cheddar Cheese, Salsa, Sour Cream, Fruit

8:00 am - Noon

Introduction to Cash Handling

Mike Pettigrew, City of Ann Arbor & John Globensky, City of Grand Rapids

Noon - 1:50 pm

Team Building & Working Lunch

Deluxe Salad Bar with Garlic Breadsticks & Pizza Buffet

2:00 pm - 4:00 pm

Principles of Managing Receipts

John Globensky, City of Grand Rapids & Mike Pettigrew, City of Ann Arbor

3:00 pm

Cookies

4:00 pm - 4:30 pm

Office Hours

Mike Pettigrew, Facilitator

5:30 pm - 6:30 pm

Reception (Rooms B-C-D)

Stuffed Jumbo Mushroom Caps, BBQ Meatballs,
Artichoke & Sundried Tomato Brushetta,
Cash Bar

6:30 pm - 8:30 pm

Dinner & Awards Ceremony (Rooms A-F-G)

Spring Mix Dinner Salad with Dried Cranberries, Feta Cheese, and Candied Walnuts, Herb Roasted Prime Rib Carving Station, Champagne Chicken, Baked Whitefish with Parsley Butter, Roasted Red Skin Potatoes, Green Beans with Almonds, Dinner Rolls
Pecan Pie, Key Lime Pie, Chocolate Triple Layer Cake



Basic Institute Schedule • April 15 - 20

Friday, April 20

7:00 am - 8:00 am ~ Breakfast

Scrambled Eggs, Potatoes, Sausage Links, Assorted Danish
Seasonal Fruit

8:00 am - 10:00 am

Effective Written Communications
Laurie Sheldon, City of Kentwood

10:00 am

Tortilla Chips with Queso & Salsa, Vegetable Cruudités with Ranch Dip, Brownies

10:00 am - Noon

Problem Solving & Personality Style
Lynn Hoerauf, MA

Noon - 12:15

Applying What We've Learned
Mike Pettigrew, Facilitator

~ Lunch on Your Own ~

Safe Travels Home!