



2019 Advanced Institute

May 20-22, 2019

The Comfort Inn & Suites, Mt. Pleasant, Michigan

MiCPT/CPFA POINT TALLY SHEET

MiCPT - Michigan Certified Professional Treasurer ~ CPFA - Certified Public Finance Administrator

Use this sheet to keep track of education points earned at the 2019 MMTA Advanced Institute.

There are a possible 10 MiCPT points; 8.75 CPFA points and 15 ACPFA points for this event.

Instruction Time	Topic	Speaker	MiCPT Points	CPFA Points	ACPFA Points
1.5 Hours	The Customer Is Always Right?!	Dr. Dale Henry Your Best Unlimited	.75	.75	-
2 Hours	Beyond the CD: Investment Opportunities for the Experienced Investor	Mike Kloack, Senior Public Funds Advisor Meeder Investment Management	1.0	1.0	2.0
1.25	Small Cell & Franchise Issues	Mike Watzka, Principal Kitch Law Firm	.625	.625	1.25
2 Hours	Legislative Issues, Economic & Local Government Trends	Eric Scorsone, Associate Professor & Director, MSU Extension Center for Local Government Finance & Policy	1.0	1.0	2.0
1	ALL IN	Gian Paul Gonzalez Executive Director, Hope + Future	.5	.5	-
2 Hours	Cash Flow Forecasting	Keith Sawdon City of Rochester Hills, retired	1.0	1.0	2.0
3 Hours	HR Issues: How to Handle Problem Employees; Hiring & Interviewing – What You Can (And Can't!) Say; HR Hot Topics	Stacy Belisle, McGraw Morris, PC	1.5	1.5	3.0
1 Hour	Breakout: Alternate Energy	Jim Wheeler, President Greater Gratiot Development	.5	.5	1.0
1 Hour	Breakout: Land Banking	Daniel Rosenbaum, Executive Director Wayne County Land Bank	.5	.5	1.0
1.75 Hours	Principles of a Good Finance Policy	Greg Prost, CIO Robinson Capital Management	.875	.875	1.75
2 Hours	How To Protect Your Office: Don't Click There!	Dan Eggleston, President IT Right	1	1	2.0
	Peer-to-Peer Learning		1.25		



2019 MMTA Advanced Institute Course Descriptions

Monday, May 20, 2019

The Customer Is Always Right?!

Presented by Dr. Dale Henry, Your Best Unlimited

Have you ever had something that was driving you crazy (besides your kids)? Have you ever had a problem staring you right in the face until your eyes crossed? Have you wondered why organizations are so consumed with delivering better service but always seem to get worse at every turn? Well, it's simple. Organizations do not deliver better service. **People** do. In this powerful, very funny, and insightful workshop attendees will explore how to serve and care for the customer's needs – and leave understanding the difference between service and servitude.

Beyond the CD – Investment Instruments for the Experienced Investor

Presented by Mike Kloack, Senior Public Funds Advisor, Meeder Investment Management

This advanced look at investments will include a discussion on Investment Policy, Permissible Investments, Investment Strategy, investigate a multitude of case studies to show real-life examples, and will include a market and economic update.

Small Cells & Cable Franchise Issues: Communications Industry Strips Local Communities of Authority, Revenue and Adds to our Costs

Presented by Mike Watza, Principal, Kitch, Drutchas Wagner Valitutti & Sherbrook Attorneys & Counselors

In the last six months, the world of telecommunications and cable law and policy has been turned on its head. Originating in both the Federal Communications Commission (FCC) as well as our own Legislature, local management and regulation of much of our public property, including in particular our Rights of Way (ROW), has been turned over to the communications industry.

Why should members of the MMTA care? Because just when you thought this year's budgets were finalized, these changes include profound impacts on local bottom lines, immediately. We estimate these changes amount to an \$8-9 billion dollar annual transfer from local communities to the communications industry nationally. The impact in Michigan likely equals several hundred million dollars annually, much of it commencing this year. Find out the what and when, as well as what you can do to stop this hemorrhaging of authority and revenues.

Legislative Issues, Economic & Local Government Trends

Presented by Eric Scorsone, Associate Professor and Director, MSU Extension Center for Local Government Finance & Policy

Eric's presentation includes an in depth look at the economic and government trends that affect the daily lives and tasks of treasurers. He'll also report on and project what legislative changes he anticipates in the near (and far) future, including what could – and should – happen at the state level. Eric's detailed knowledge about Michigan Treasury, our local economy, and the responsibilities of our treasurers will prove invaluable to attendees as they make policy recommendations to their boards, councils, and communities.

Tuesday, May 21, 2018

ALL IN

Presented by Gian Paul Gonzales, Executive Director, Hope + Future

Professional coaches draw up game plans and marketing teams unveil new sales strategies; however, no matter how revolutionary or foolproof the plans, the key for successful implementation is in the commitment of the listeners to carry out what they've heard and not just agree but go ALL IN. In this program, Gian Paul discusses the keys to helping empower you and your organization to truly commit to your goals despite the obstacles which will try to hinder the type of ALL IN commitment you will need for success.

Cash Flow Forecasting and Analysis

Presented by Keith Sawdon, Retired Director of Finance, City of Rochester Hills

Attendees will learn the essentials to building a Cash Flow Forecasting model using historic data, their personal experience and/or logic. But what do they do with the information provided from the cash flow forecast model? The second half of the program will demonstrate how to apply the Cash Flow Forecasting information against the current investment holdings to give direction to adjusting and rebalancing future investment holdings.

How to Handle Problem Employees, Hiring & Interviewing – What You Can (And Can't!) Ask, Hot HR Topics

Presented by Stacy Belisle, McGraw Morris, PC

These advanced HR topics will provide the skills any treasurer/manager needs to deal with their employee responsibilities. Of special note will be how to handle problem employees, especially how a manager can work with an employee suspected of being a security breach or having potentially stolen/embezzled without clear cut proof. There will be an in depth session on the hiring process: what are fair and legal questions, and what are not, as well as a discussion on what types of background checks are most appropriate in a given situation. Lastly, a discussion on timely HR issues, especially topics that are being affected by new legislation and rulings in our state.

Alternate Energy

Presented by Jim Wheeler, President, Greater Gratiot Development

This presentation will be an example of how the alternative energy industry can impact an area in terms of its landscape, economy, government, and other areas, specifically as shown in the case of Gratiot County. Gratiot is home to three operational wind farms, and two more are under development. A focus of this presentation will be on the tax revenue realized by the County, townships, schools, and other services as a result of wind development.

Land Banking in Michigan

Presented by Daniel Rosenbaum, Executive Director, Wayne County Land Bank

This comprehensive presentation will touch on both the basics and details of land banks, as well as a discussion on advanced land banking solutions, the opportunities, and potential effects that land banks have on county and local treasurer's responsibilities. Land banks can be an incredible tool and partner for communities; this presentation will give you the information to be a valuable resource to your community on land banking.

Wednesday, May 22, 2018

Principles of a Good Investment Policy

Presented by Greg Prost, CIO, Robinson Capital Management

Everybody has a solid investment policy, right? Don't answer that too quickly – this session may show you areas for improvement as it provides a framework that everyone's investment policy should conform to. Attendees are encouraged to bring their investment policy with them, to do a hands-on comparison of the recommended components of an investment policy. Learn about the requirements to get your investment policy certified by the Association of Public Treasurers of the US and Canada.

How to Protect Your Office – Don't Click There!

Presented by Dan Eggleston, President, IT Right

We've all heard the horror stories of how cyber threats can effectively shut down an office by holding your data hostage or just infecting your email with scam offers. We'll take cyber-security to another level with this discussion of the threats that everyone needs to be aware of, whether you have a single PC in your office or an entire staff of IT professionals working for your benefit. Learn to be proactive through this presentation of advanced insights and prevention techniques that can keep you, your employees, and constituents – and their data – safe.