



**Ohio Association of Public Treasurers
Public Finance Officers Training Institute - June 11-15, 2018
Maintenance Program June 14-15, 2018
Kalahari Resort & Conference Center**



A					
C	C				
P	P	C	C		
F	I	P	L		
A	M	E	E	Class # of	# Hours

CPIM, CPE, CPFA, ACPFA and CLEs are ALL Approved

Sunday, June 10th *Hotel Check-in*

Monday, June 11th

7:30-8 am **Registration & Breakfast**
8-8:30 am **Welcome & Introductions**

	3.6	3.0	1	3	8:30-11:45 am	Managing Electronic Records: Ensuring Access to Reliable and Authentic Public Records Throughout their Lifecycle Ohio State University, Pari Swift, University Records Manager
--	------------	------------	----------	----------	---------------	---

11:45-12:45 pm **Lunch**

	2.0	2.4	2.0	2	2	12:45-2:45 pm	Capital Planning: A Story of Debt, Uncertainties, and the Importance of Fiscal Policies Columbus City Auditor, Megan Kilgore and Katie Johnson, Partner, Bricker and Eckler
--	------------	------------	------------	----------	----------	---------------	--

2:45-3:00 pm **Break**

	2.0	2.4		3	2	3:00-5:00 pm	Introduction to Governmental Accounting Marni Hall, Director of Financial Reporting, Columbus City Auditor's Office
--	------------	------------	--	----------	----------	--------------	--

6:00 - 8:00 pm **Networking Event at the Marrakesh - food and refreshments**

Tuesday, June 12th

7:30-8 am **Breakfast**

		2.4	2.0	4	2	8-10 am	Communication Effectiveness Melanie Carver, founder and Principal, Vizionelle Coaching
--	--	------------	------------	----------	----------	---------	---

10-10:15 am **Break**

	2.0	2.4		5	2	10:15-12:15 pm	Financial Reporting Chad Welty, Principal and Anita Martin, Manager, Rea & Associates, Inc.
--	------------	------------	--	----------	----------	----------------	--

12:15-1:15 pm **Lunch**

	2.0	2.4	2.0	6	2	1:15-3:15 pm	Internal Controls/Fraud Detection Derek Conrad, Senior Manager, and Jennifer Masters, Manager, Rea & Associates, Inc.
--	------------	------------	------------	----------	----------	--------------	--

3:15-3:30 pm **Break**

	2.0	2.4	2.0	7	2	3:30-5:30 pm	State of Ohio Enterprise Grants Efforts and Common Grants Compliance Issues Stacie Massey, State Accounting Manager 3 for the Ohio Office of Budget and Management
--	------------	------------	------------	----------	----------	--------------	---

Wednesday, June 13th

7:30-8 am **Breakfast**

		2.4	2.0	8	2	8-10:00 am	Structure of Ohio Local Governments Harold Babbit, Adjunct Professor of Local Government, Cleveland Marshall College of Law
--	--	------------	------------	----------	----------	------------	--

10-10:15 am **Break**

	2.0	2.4		9	2	10:15-12:15 pm	Public Budgeting Alyssa Kerker, Franciscan University of Steubenville
--	------------	------------	--	----------	----------	----------------	--

12:15 pm **Open Afternoon, Join our Networking Event OR Enjoy Sandusky and the Lake Erie Shores!**



**Ohio Association of Public Treasurers
Public Finance Officers Training Institute - June 11-15, 2018
Maintenance Program June 14-15, 2018
Kalahari Resort & Conference Center**



A					
C	C				
P	P	C	C		
F	I	P	L	Class # of	
A	M	E	E	#	Hours

CPIM, CPE, CPFA, ACPFA and CLEs are ALL Approved

Thursday, June 14th

						7:30-8 am	Registration & Breakfast
		2.4	2.0	10	2	8-10 am	Managing a Multi-Generational Workforce and Can I ask that? Interviewing tips and best practices Clemans, Nelson, Andrew Esposito, Account Manager/Shareholder
						10-10:15 am	Break
1.0	1.0	1.2		11a	1	10:15-11:15 pm	Investment Tips and Techniques for this Economic Environment &
1.0	1.0	1.2		11b	1	11:15-12:15 pm	Overcoming the Biases that Derail our Investment Decisions Meeder Investment Management, Jason Click, President Public Funds; Jason Headings, Senior Vice President Public Funds; Eileen Stanic Sr. Public Funds Advisor
						12:15-1:15 pm	Lunch
1.0	1.0	1.2	1.0	12	1	1:15-2:15 pm	Banking/ Treasury Management for Today and Tomorrow USBank, Steve Broerman, Vice President Government Banking, Elyse Trout, VP Deposits/Pymts
						2:15-2:30 pm	Break
2.0	2.0	2.4	2.0	13	2	2:30-4:30 pm	Debt Management: Understanding the Debt Options for Ohio Political Subdivisions Matthew Stout, Partner and Jackie Lewis, Associate, Bricker & Eckler LLP
1.0	1.0	1.2	1.0	14	1	4:30-5:30 pm	Managing Banking Relationships Tony Okray, Senior Vice President Government Banking Relationship Manager, Huntington
						6-7 pm	Reception
						7-9 pm	Awards Banquet

Friday, June 15th

						7:30-8 am	Breakfast
		2.0	2.4	2.0	15	2	8-10 am
						10-10:15 am	Break
2.0	2.0	2.4	2.0	16	2	10:15-12:15 pm	Revenue Collections Weltman, Weinberg & Reis, Co., L.P.A., Sara Costanzo, Shareholder/Attorney
						12:15-12:30 pm	Break - Pick up boxed lunch for working lunch
		1.2	1.0	17	1	12:30-1:30 pm	Ohio Legislative and Political Update—Proposed Laws Impacting Public Finance Amanda M. Grandjean, Associate with Bricker & Eckler LLP

32 Total Hours

	22.0	38.4	24.0	TOTAL - Weeklong	
8.0	10.0	15.6	11.0	TOTAL - Maintenance	
A	C	C	C		
C	P	P	L		
P	I	E	E		
F	M				
A					

Training Institute End - Drive Safely

**Monday through Friday Program = 15 CPFA Points ^
Thursday and Friday Only = 6.5 CPFA Points ***

* If you have already received your CPFA = 8 ACPFA & 2.5 CPFA
^ 15 CPFA Points in Years 1 and 2; 20 CPFA Points in Year 3
2018 is year 2 - participants can start anywhere in the 3 year cycle

Registration information online at www.ohioapt.org Contact: OAPTEducation@gmail.com