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Ohio Public Finance Officers Training Institute *2017 Program Brochure*

 **THE OHIO STATE UNIVERSITY**
JOHN GLENN COLLEGE OF PUBLIC AFFAIRS



Institute Partners

37th Annual
Public Finance Officers Training Program
June 12-16, 2017

CPFA Maintenance Program
June 15-16, 2017

Kalahari Resort & Conference Center
Sandusky, Ohio



OAPT Finance Officers Training June 12-16, 2017

Topics

- ◆ Principles of Public Finance
- ◆ Cash Management/
Banking Relations
- ◆ Investing in Public
Funds
- ◆ Debt Management
- ◆ Internal Controls/Fraud
Detection
- ◆ Ethics and the
Treasurer
- ◆ Financial Reporting
- ◆ Revenue Collections
- ◆ Technology
- ◆ Disaster Preparedness
- ◆ Written Communica-
tions
- ◆ Personnel Management
- ◆ Problem Solving



Hotel

The room rate at the Kalahari is \$119 per night. Reservations can be made by calling 1-877-525-2427 on or before **Friday, May 12, 2017**. Please ask for the **Public Finance Training by OAPT** Room Block. All rooms at the Kalahari come with complimentary water park passes (four per standard room). Parking is free.

Conference Registration

The OAPT Public Finance Officers Training Program is divided into two separate but related programs.

Whether you have not yet begun the CPFA program, have completed a portion of the program, or simply wish to maximize your educational opportunity, we offer a five-day program. We also offer a two-day maintenance program to provide part of the necessary training to re-certify your designation. Please refer to the registration form for program fees.

In addition to the program fees, there will be a cancellation fee of \$200 for the week-long program and \$100 for the two-day program after May 31, 2017.

To properly serve and accommodate participants we have a registration cut-off of June 1, 2017. Space is limited, any registrations after June 1st will be on a first come basis until the sessions are full.

Certification Credits Available

Fiscal Integrity Act

CPIM CPE CPFA ACPFA CLE

About the Ohio Public Treasurers Training Program

For over three decades the Ohio Association of Public Treasurers has been sponsoring training to advance knowledge of the most current practices in the profession. Following a program developed by the Association of Public Treasurers of the United States & Canada (APT US&C), the training program is designed to provide professional development and skills training for those in local government finance in Ohio. The three year program is a key element in attaining the professional designation of Certified Public Finance Administrator (CPFA).

This program provides both skills development and content specific education. The program has two components; the five-day training curriculum for those just starting, or who are part way through the certificate training and the two-day maintenance program for those who have a certificate, but wish to gain more current knowledge in the field of public finance and/or who wish to make use of the continuing education credits available to them from the training program to maintain their various certifications.

In addition, credits toward the State Treasurer's Office CPIM program are available based upon specific sessions offered during the three-year cycle of training, and continuing education credit is available for all participants.

The Institute Sponsor: The Ohio Association of Public Treasurers

The Ohio Association of Public Treasurers (OAPT) was established to promote the general and professional interest of the public treasurers in their respective communities, to obtain a higher level of efficiency, to improve service with allied institutions and to inspire friendly and fraternal relationships among our members. This program is one of many educational opportunities offered by the OAPT.

This year we expect to have an exceptional program with the assistance of our partners, the Ohio State University, John Glenn College of Public Affairs and the Public Treasury Institute, they share the same commitment with the OAPT in providing public finance officers with a valuable learning experience in a friendly atmosphere.

Today the OAPT has over 400 members representing communities from all over the State of Ohio and over 100 associate members. For over three decades we have been offering our members, and other public finance professionals, training and other skills development.

The Certification Programs

CPFA—To be eligible for this prestigious designation, an individual must be the elected or appointed treasurer, deputy or assistant treasurer, employee in/or dealing with the office of the treasurer or principal officer in the governmental entity who is charged with the performance or supervision of one or more of the following responsibilities, investments, debt or treasury. The APT US&C certification requires 100 hours of training pursuant to their curriculum. There are other requirements related to education and experience before the certificate is awarded. This training program is one step, but certainly a major step along the path towards earning CPFA designation. Three years of membership in the APT US&C national association is also required.

CPIM—The Ohio Treasurer of State's Center for Public Investment Management (CPIM) provides Ohio public funds managers with high-quality instruction in the areas of investments and cash management, as prescribed by Ohio Revised Code section 135.22, by providing their own training and by partnering with professional organizations, like the OAPT. For more information, visit the Ohio Treasurer of State's website at: www.tos.ohio.gov The OAPT program has provided attendees with more than sufficient CPIM hours to meet the hour annual requirement.

CPE Credit—This program qualifies for Continuing Professional Education credit for Certified Public Accountants.

Fiscal Integrity Act Training Requirement

In 2015 new rules came into effect as a result of HB10/SB6 which require on-going training for Fiscal Officers in Ohio. For more information visit the Ohio Auditor of State's website at www.ohioauditor.gov. This program, by including CPIM credit and Ethics training, will qualify for FIA required hours.

CLE—Continuing Legal Education for Attorneys

Special Events and Features of the Program

On Wednesday afternoon we will coordinate a social outing to one of the many points of interest in the Sandusky Lakefront area.

The program includes breakfast daily, luncheon, M, T, & TH, coffee/snack breaks, and there will be a banquet for all participants on Thursday evening.

Attire is Casual to Business casual, including the banquet. Also, bring a sweater for the air conditioned conference center.

Scholarships applications are available on our website at www.ohioapt.org and click on the public finance officer training tab.

Program Contacts:

Sal Talarico, Director of Education

OAPTEducation@gmail.com

Jack Krise, Jr., Executive Director

Registration

On-line registration: www.ohioapt.org and click on the Public Finance Officer Training tab, you can also use a credit card to pay on-line, or use this form with a check.

Five-day Training Program
Before April 30, 2017 _____ \$485
April 30th or later _____ \$525

Two-day Maintenance Program
before April 30, 2017 _____ \$285
April 30th or later _____ \$325

Banquet Guest _____ \$40

Make Check Payable to:

Ohio Association of Public Treasurers
2113 Oaklawn Drive
Parma, OH 44134

Registration Information

CHUCK WALDER, FISCAL OFFICER

Name and Title

RUSSELL TOWNSHIP

Public Entity

8501 KINSMAN RD, POB 522

Address NOVEMBER, OH 44072

440-338-8155, 216-554-1094

Telephone number

Cwalder@RussellTownship.us

E-mail address

Other Information

This is my ___ 1st ___ 2nd OR ___ 3rd Year

Other (How many years? 5)

Meals ___ I require vegetarian meals

I do ___ do not plan to attend the Thursday evening banquet

