

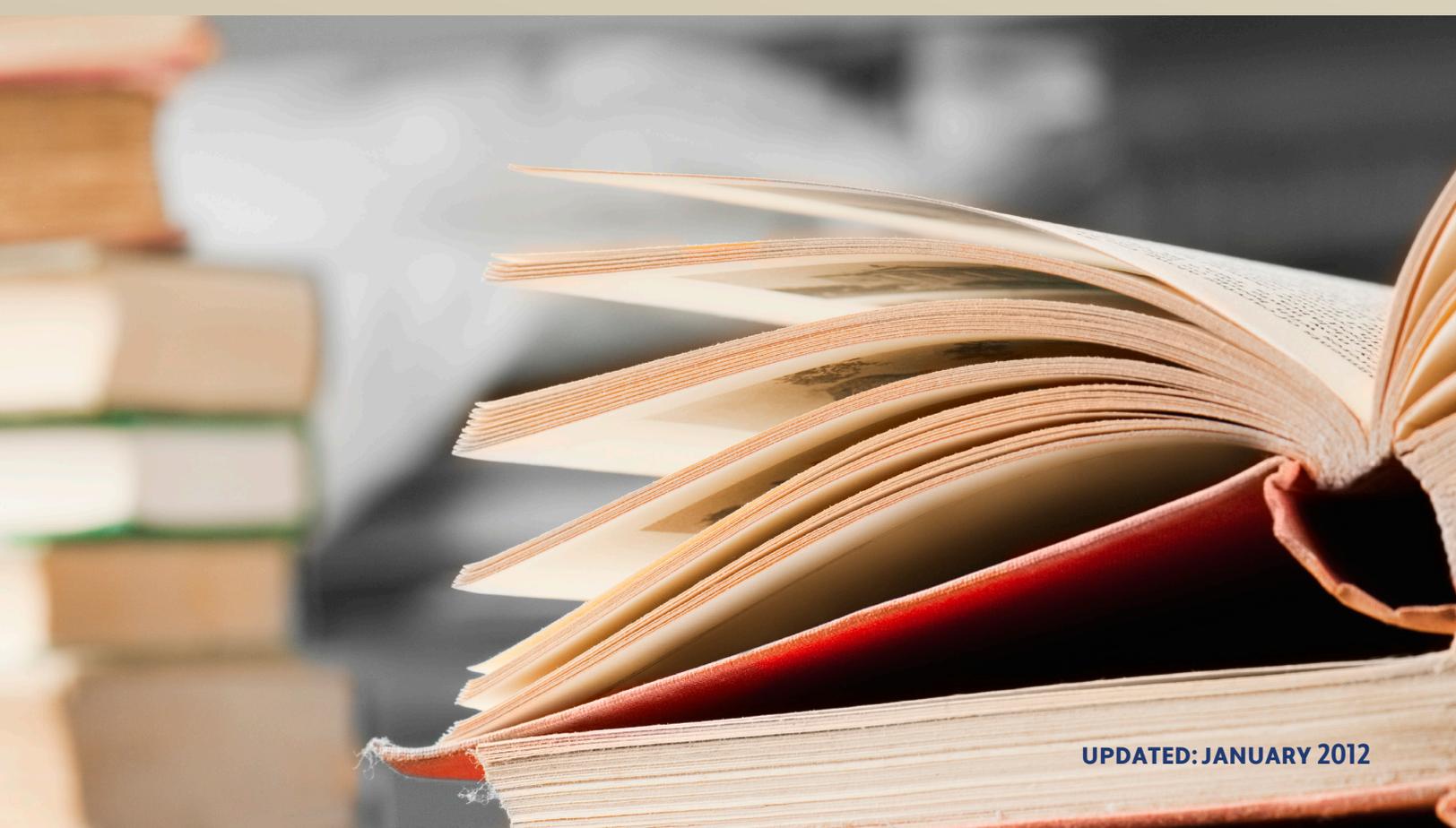
**CPIM**  
CENTER FOR PUBLIC  
INVESTMENT MANAGEMENT



BROUGHT TO YOU BY  
STATE TREASURER OF OHIO  
JOSH MANDEL

# **OHIO TREASURER'S CENTER FOR PUBLIC INVESTMENT MANAGEMENT (CPIM)**

## **ACCREDITATION GUIDELINES FOR PROFESSIONAL PUBLIC FINANCE TRAINING**



**UPDATED: JANUARY 2012**

## Ohio Treasurer of State's Center for Public Investment Management Initiative to Partner with Professional Public Finance Associations

The Center for Public Investment Management (CPIM) has implemented a partnering initiative with professional associations within the State of Ohio to award CPIM-approved continuing education hours at association-sponsored annual conferences and training seminars.

These partnerships allow CPIM and professional associations to coordinate educational efforts in order to provide the most meaningful learning experience for Ohio's public funds managers. It also allows both parties to coordinate schedules and share resources such as curriculum, instructors, and innovative ideas about the training experience.

CPIM will maintain a hands-on approach throughout the entire accreditation process, from the initial request through the distribution of the Certificates of Program Completion. A representative from the State Treasurer of Ohio's office may attend the session(s) to monitor for quality control. CPIM reserves the right to rescind accreditation if the session(s) does not meet the original standards upon which approval was given. In the event that this is a result of poor instructor skills and not due to course content, this will be taken under consideration when determining whether or not credit will be awarded. If credit is not given, the approved number of hours for the workshop will be changed to reflect this reduction.

CPIM would like to be involved in the planning phase of the association's annual conference **before** the accreditation request is made and the course selection is finalized. This will ensure that both the association's, as well as CPIM's, needs are met without any confusion or contradictions.

### Training Requests

- Requests for accreditation must originate from a professional association, not a vendor or an individual.
- Requests may be preceded by a planning meeting between the association and CPIM. After the planning is complete, requests must be received by CPIM, **no later than 14 business days** before the first day of the workshop.

### Approval

- It is in the association's best interest to submit requests as early as possible so that it may advertise the number of hours of CPIM credit approved for workshops. However, **should any marketing materials be published before approval is given, the association must state that "CPIM credit has been requested and is contingent upon approval."** This is imperative to ensure that participants are not misled in the event that a course does not receive approval.
- Approval is given for actual instructional time. Please take into account any breaks that may occur and deduct them from the requested course length in increments of 0.25 hours (15 minute increments).
- It is recommended that one break is taken for every 90 minutes of instructional time.
- Should a course begin 15 or more minutes after its scheduled start time and/or end 15 or more minutes before its scheduled end time, the appropriate reduction will be made in the number of hours of credit given.

**Office of the State Treasurer of Ohio**  
**Center for Public Investment Management (CPIM)**  
**Phone: (800) 228-1102, Option #2**  
**E-mail: [cpim@tos.ohio.gov](mailto:cpim@tos.ohio.gov)**  
**[www.ohiotreasurer.gov/CPIMhome](http://www.ohiotreasurer.gov/CPIMhome)**

## **Accreditation Guidelines**

### **Approval for Courses Provided by Partnering Association**

The following guidelines have been created to assist you in completing an accreditation request. The guidelines will also assure CPIM that each approved course meets the requirements. All CPIM accredited courses must be maintained at the same exceptional standard to which the actual CPIM courses are held.

Please use the following **checklist** to prepare proper documentation to submit for an accreditation request. You must complete an overall "Request for Accreditation Survey Summary Page" and at least one "Individual Course Approval Form" with the required attachments for each course, even if the course has been previously offered at a CPIM conference.

#### **ACCREDITATION CHECKLIST**

You must have each of the following:

- **Name of Requesting Association**
- **Name and Contact Information of Person Completing the Request**
- **Date of Request**
- **Date and Time of Course** – *Provide the date and time the course will be taught.*
- **Course Title** – *The title should answer the question "what will participants come away with?"*
- **Course Description & Learning Objectives** – *Provide a brief description clearly stating the topics, issues and goals of the course.*
- **Statement of Accreditation Rationale** – *To meet Ohio Treasurer's office continuing education standards, a course must enhance a participant's background and working knowledge in **finance, investments, cash management (including debt issuance and management)**, and/or **ethics**. State the rationale as to why the course meets these standards for continuing education.*
- **Course Length** – *Provide the course offerings in hours.*
- **Define the Target Audience** – *Include target audience experience level.*
- **Bio of Instructor(s)** – *Provide bio for all instructors for each individual course.*

Once accreditation is granted, CPIM will work with the association to participate in the upcoming courses when possible. Additionally, CPIM staff will provide the "Certification of Hours Form" required to be completed by all attendees seeking CPIM credit for attendance. For your convenience and information a sample Certification of Hours Form is attached. Participants will receive this form at the beginning of the conference to track their hours. In order to maintain the integrity of our program, participants must complete and submit the form at the end of the training. **The Certification of Hours Form must be submitted to a staff member by the time indicated on the form, typically the last CPIM certified course for the workshop.**

**PLEASE REITERATE TO YOUR MEMBERSHIP THAT NO CREDIT WILL BE GRANTED,  
IF A PARTICIPANT'S CERTIFICATION OF HOURS FORM IS INCOMPLETE OR SUBMITTED  
AFTER THE DATE AND TIME OF THE CPIM SESSIONS.**

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CENTER FOR PUBLIC INVESTMENT MANAGEMENT



A PROGRAM BROUGHT TO YOU BY:  
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**REQUEST FOR ACCREDITATION SUMMARY COVER PAGE**

*Please Complete.*

1. Name of Requesting Association

\_\_\_\_\_

2. Name and contact information of person completing request

Name \_\_\_\_\_

Phone Number \_\_\_\_\_

Email Address \_\_\_\_\_

3. Date of Request \_\_\_\_\_

4. Date(s) of Training \_\_\_\_\_

5. Location of Training \_\_\_\_\_

6. Total Number of Continuing Education Hours Sought for Approval \_\_\_\_\_

*An electronic version of this form is available at:  
[www.ohiotreasurer.gov/cpim\\_accreditation](http://www.ohiotreasurer.gov/cpim_accreditation)*

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**INDIVIDUAL COURSE APPROVAL FORM**

*Complete One Form for Each Course to be Accredited.*

1. Name of Requesting Association \_\_\_\_\_

2. Name and contact information of person completing request

Name \_\_\_\_\_

Phone Number \_\_\_\_\_ Email Address \_\_\_\_\_

3. Date of Request \_\_\_\_\_

4. Date(s) and Time of Course \_\_\_\_\_

5. Course Title \_\_\_\_\_

6. Course Description & Learning Objectives

7. Statement of Accreditation Rationale

8. Course Length \_\_\_\_\_ 9. Target Audience \_\_\_\_\_

10. Instructor Biography \_\_\_\_\_

*An electronic version of this form is available at:  
[www.ohiotreasurer.gov/cpim\\_accreditation](http://www.ohiotreasurer.gov/cpim_accreditation)*

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**Ohio State Treasurer's Center for Public Investment Management  
Professional Public Funds Manager's Association Annual Conference**

**CERTIFICATION OF HOURS FORM**

<u>Wednesday, January 19</u>		<u>Hrs. Possible</u>	<u>Hrs. Attended</u>
10:15 ~ 11:15	Cash Management 101 for Public Fund Managers	1.0	_____
11:30 ~ 12:30	Ohio Ethics Laws	1.0	_____

**TOTAL HOURS EARNED** \_\_\_\_\_

*A maximum of two (2.0) hours may be earned during this conference. A minimum of six (6) hours are required to meet your annual continuing education requirement under the Ohio Revised Code 135.22.*

**Please Print**

Name \_\_\_\_\_ Address \_\_\_\_\_

Title \_\_\_\_\_ CSZ \_\_\_\_\_

Entity \_\_\_\_\_ Phone \_\_\_\_\_

County \_\_\_\_\_ Email/Fax \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

***PLEASE NOTE: This form must be submitted to a staff member by the end of the last session at 12:30 PM on January 19, 2011. No forms will be accepted after that date and time.***

**Please indicate whether you are seeking CPIM certification (i.e., that you want credit for these hours). If no, you will NOT receive CPIM credit for these courses. If yes, you will be invoiced for the certification fee, UNLESS you've already paid it.**

Yes \_\_\_\_\_ or No \_\_\_\_\_

*This form will be used for determining compliance status for the Ohio Auditor of State's Office pursuant to Ohio Revised Code 135.22 and will become public record once completed.*