



**JOSH MANDEL**  
STATE TREASURER OF OHIO

# Ohio Treasurer's Center for Public Investment Management



## Accreditation Guidelines for Professional Public Finance Training

Updated January 2011

## 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 Ohio State Treasurer'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 10 business days before the first day of the workshop.

### Approval

- It is in the association's best interest to get requests in 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 a 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.

## **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 summary sheet and one individual 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 Course is to be taught**
- ✓ **Course Title** (Should answer the question “what will participants come away with?”)
- ✓ **Course Description** (2 to 4 sentences that assist participants in determining whether or not this is the right course for them)
- ✓ **Course Length** (In hours)
- ✓ **Course Learning Objectives** (List 1 to 3 objectives, depending on the length of the course)
- ✓ **Define the Target Audience** (Include experience level needed)
- ✓ **Bio of Instructor(s)** (Provide bio for all instructors for each specific course)

Once accreditation is granted, CPIM will work with the association to participate in the upcoming courses where possible. Participants will receive a Certification of Hours form at the beginning of the conference (see sample below) to track their hours. In order to maintain the integrity of our program, participants must complete the form and submit it at the end of the training.

**PLEASE REITERATE TO YOUR MEMEBERSHIP THAT NO CREDIT  
WILL BE GRANTED AFTER THE SESSION IS COMPLETE.**

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 \_\_\_\_\_

*For an electronic copy of this form, please contact CPIM at  
(614) 728-4236 or [communityeducationprograms@tos.ohio.gov](mailto:communityeducationprograms@tos.ohio.gov)*

**INDIVIDUAL COURSE APPROVAL FORM**

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

1. Course Title \_\_\_\_\_

2. Course Description (and relevance to CPIM) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. Course Length \_\_\_\_\_

4. Date and Time Course is to be taught \_\_\_\_\_

5. Course Learning Objectives \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

6. Target Audience \_\_\_\_\_

7. Instructor Biography \_\_\_\_\_

*For an electronic copy of this form, please contact CPIM at  
(614) 728-4236 or [communityeducationprograms@tos.ohio.gov](mailto:communityeducationprograms@tos.ohio.gov)*

**FOR CPIM USE ONLY**

**Date of Review** \_\_\_\_\_

**Reviewer's Name** \_\_\_\_\_

- Approved for Accreditation Purposes
- Not Approved for Accreditation Purposes, explanation below

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**Date Association Is Notified** \_\_\_\_\_



# Josh Mandel

## Ohio Treasurer of State

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

#### CERTIFICATION OF HOURS FORM

<u>Wednesday, January 14, 2011</u>		<u>Hours Earned</u>	<u>Attended</u>
8:30 ~ 10:00	Cash Management Techniques	1.50	_____
		<b>TOTAL HOURS EARNED</b>	_____

*A maximum of five and a half (5.5) 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.*

**Please Print**

Name \_\_\_\_\_

Title \_\_\_\_\_

Entity \_\_\_\_\_

Address \_\_\_\_\_

County \_\_\_\_\_

Phone \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

**NO CREDIT WILL BE ACCEPTED AFTER THE SESSION IS COMPLETE.**

*The completed form will be used in 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.*