

# BOARD COORDINATOR GENESEE COUNTY BOARD OF COMMISSIONERS

1101 BEACH STREET, ROOM 312 FLINT, MICHIGAN 48502

> TELEPHONE: (810) 257-3020 FAX: (810) 257-3008

JOSHUA M. FREEMAN COORDINATOR

#### GOVERNMENTAL OPERATIONS COMMITTEE Monday, August 14, 2017, 9:00 a.m. AGENDA

- I. CALL TO ORDER
- II. ROLL CALL
- III. MINUTES July 31, 2017 Attached
- IV. PUBLIC COMMENT TO COMMITTEE
- V. COMMUNICATIONS

**Presentation – Kris Johns and Vanessa Ferguson Laudatory** 

- VI. OLD BUSINESS
- VII. NEW BUSINESS
  - A. G081417VIIA: Circuit Court: Request approval to extend contract for substance abuse testing services with D'n'A Drug and Alcohol Testing Center from 10-01-17 through 09-30-18 -- Attached
  - B. G081417VIIB: Circuit Court: Request approval to extend contract for outpatient substance abuse services with Catholic Charities of Shiawassee and Genesee Counties from 10-01-17 through 09-30-18 -- Attached
  - C. G081417VIIC: Circuit Court: Request approval to enter into a professional services contract with Buckham Fine Arts to provide services outlined in the United Way Community Impact grant -- Attached
  - D. G081417VIID: District Court: Request approval to extend the drug testing services contract with Drug and Alcohol Testing Centers, Inc. (D'n'A) from 10-01-17 through 09-30-18 Attached (ROLL CALL VOTE REQUESTED)
  - E. G081417VIIE: District Court: Request approval to extend the substance abuse treatment contract with Flint Odyssey House, Inc. (FOH) from 10-01-17 through 09-30-18 – Attached (ROLL CALL VOTE REQUESTED)
  - F. G081417VIIF: Office of the Sheriff: Request approval of the 2017 Marine Safety Program Grant Agreement between the Office of the Genesee

County Sheriff and the Michigan DNR in the amount of \$24,200.00 – Attached (ROLL CALL VOTE REQUESTED)

- G. G081417VIIG: Treasurer: Request approval to change the job title of Accounting System Coordinator to Treasury Operations Supervisor Attached
- H. G081417VIIH: Friend of the Court: Request approval of overnight travel for nine (9) employees to attend the Michigan Family Support Council conference for the period of October 4-6, 2017, Boyne Highlands, Michigan at a cost not to exceed \$1,104.39 (total cost of conference \$3,248.22) Attached
- I. G081417VIII: Health Department: Request approval of overnight travel for Ingrid Fink and Kim Borse to attend the 2017 Governmental Finance & Administrators Seminar for the period of September 14-15, 2017 in Mt. Pleasant, Michigan at a cost not to exceed \$315.50 – Attached (ROLL CALL VOTE REQUESTED)
- J. G081417VIIJ: IT Department: Request approval of overnight travel for Christopher A. Newell, CIO to attend the CGI Forum 2017 annual conference for the period of October 22-24, 2017 in Orlando, Florida at a cost not to exceed \$2,471.64 – Attached (ROLL CALL VOTE REQUESTED)

#### VIII. OTHER BUSINESS

IX. ADJOURNMENT

#### GOVERNMENTAL OPERATIONS COMMITTEE Monday, July 31, 2017, 9:00 a.m. MINUTES



CALL TO ORDER

Chairperson Nolden called the Governmental Operations Committee to order at 9:02 a.m.



**ROLL CALL** 

Roll Call.

**Present:** Nolden, Ellenburg, Courts, Young, Shapiro, Cousineau, Henry, Martin.

Absent: Clack, Henry.



Chairperson Nolden stated he was adding a closed session at the end of the meeting.

Motion: To add closed session.

**Action:** Approve, **Moved by** Ellenburg, **Seconded by** Cousineau. **Vote:** Motion passed (**summary:** Yes = 6, No = 1, Abstain = 0). **Yes:** Courts, Cousineau, Ellenburg, Martin, Nolden, Shapiro.

No: Young.



MINUTES – July 17, 2017

Motion: To approve the minutes of the July 17, 2017 Governmental Operations

Committee meeting, as presented.

Action: Approve, Moved by Young, Seconded by Ellenburg.

Motion passed unanimously.



PUBLIC COMMENT TO COMMITTEE

Roy Webber, Chief Deputy Register of Deeds, requested the Committee go into closed session to discuss his personnel matter.

Commissioner Henry entered the meeting at 9:04 a.m.



John Gleason, Clerk/Register of Deeds, commented regarding Roy Webber's compensation.



COMMUNICATIONS

Human Resources - Chief Deputy Register of Deeds Unit Clarification

Ms. Galajda stated that she received this morning the final letter from MERC that they adopted the recommendation from ALJ as written. As of July 7<sup>th</sup>, the position was removed from the bargaining unit by MERC. She stated that the commissioners need to now decide some things: rate of pay, benefits come from personnel policy manual, and overtime is exempt. The other changes would be exempt from overtime, life insurance is \$100,000 instead of \$50,000, short-term and long-term disability rates are different. That's about the only differences between the two positions.

Chairperson Nolden commented that he does understand that prior to this determination that Mr. Webber had worked a considerable amount of overtime and that was part of the issue going forth that he wanted to be paid back pay. Ms. Galajda stated that there is going to be discussion regarding back pay. As an appointed exempt, he would not have received overtime – he would have gotten his annual salary as it was set. The difference in pay between the previous chief deputy register of deeds and the current chief deputy of register of deeds comes out to about \$9,000. The difference he made in overtime comes out to about \$25,000 and this is just from January. November and December is not included.

Commissioner Young commented that there was some clarification that needed to be done through MERC to determine what category or classification this position was. The request to remove this from a union position and make it exempt originated through Register of Deed Gleason's office. That is one of the things that we have prior history that says we couldn't do that and then as part of the process Clerk/Register of Deeds requested clarification. There was a lot of concern by Commissioner Cousineau at one of our earlier meetings that if we did do any resolution that it would include back pay back to when Mr. Webber originally came in to his position. He doesn't know what promises were made to the Clerk/Register of Deeds by Corporation Counsel. They only thing is it's this board that has to make some of these decisions and he thinks they are the ones that legally can make those decisions. His statement that they made promises to him I don't know if that is accurate. I'm not saying it's wrong. I just think there was probably a misunderstanding there. He further stated that he's always been willing to give the pay back retroactive to when Mr. Webber was hired. I would make that motion but again that makes him exempt from overtime—the overtime would have to be subtracted from whatever gain he has on that too going forward. You can't have the best of both worlds in this process. Commissioner Henry stated he would support that. Commissioner Cousineau stated he would too.

Commissioner Courts stated that she wanted to make it clear that we were waiting for the letter from MERC before we made that final decision and didn't do something before we should have. Ms. Galajda stated that MERC is the commission that can remove positions from a bargaining unit. You're calling it "back pay", but my position is that the position wasn't removed from the bargaining unit until July 7, once this order to effect.

Commissioner Shapiro asked for Clerk/Register Gleason to speak.



Clerk/Register Gleason stated he wanted to thank you and thank you particularly because too many times we talk first and then you speak and then you make a decision without us having a chance to what is discussed. My initial remark was that we have to get the hiring process right. When I first took office, my chief register was in the union and made close to \$30,000 in overtime as a salaried/union person. So this is not the first time that we're talking about this stuff. We just need to sit down and get the facts right and figure how we're going to hire people and how we're going to pay them. Now, Roy asked to go into closed session—we're talking about his position, and once again, it gets off track in the discussion that is undertaken now. Roy has asked to go behind closed doors to have this discussion. He has that right. When you start talking about his pay and compensation, he gets to go back there. We have to start doing things the right way in this County. We have already laid the track. I'm telling you I was on the phone call with Roy Webber and Celeste Bell. She said "please, whatever you do, don't sue". I agree that we have had too many lawsuits in this county, but eventually you have to sue to get things right. I want to thank the commissioner. I think anytime you have an elected official who holds a constitutional office and you start discussing facts that you give that individual another chance at this microphone. The track was already set with Shannon Cooper. She had the same position Roy does and she got both. I think that we have too many lawsuits. When I first took this office four years and six months ago, I said that we've got to do things a little bit better, a little bit different. Roy was promised that his pay would be right January 1st—it should be right January 1st, but it never should be wrong. You already set the track with Shannon Cooper and you already set the track with Roberta Sacharski by paying her her pay. I know there are five new ones. They didn't limit Roberta Sacharski's pay to what the union position stated it should be. Let's move forward and get things right. That's all we're asking-just do it right. If that's what our policy is then follow the policy. I do think that Mr. Webber's rights were violated when he said he wanted to go behind closed doors and talk about his compensation. I believe you should have done that. Thank you.

Commissioner Cousineau stated he would agree with Mr. Gleason that employees have rights and we should go into closed session.



Chairperson Nolden asked Corporation Counsel Bell to comment and give clarification to what she just heard.

Corporation Counsel Bell stated that there were conversations between herself and Mr. Webber and Clerk Gleason. I'm sure all of your know me better that I, of course, did

not make any promise that money would be paid or that there is any date attached to this. Our legal opinion stood behind it at the time and had a lot to do with the conversation. We have since updated our opinion based on the MERC decision. The office position has changed regarding Mr. Webber's status. The other thing that I think I need to comment on that it is certainly is Mr. Webber's right under the Open Meetings Act to request a closed session for certain discussions: dismissals, suspensions, disciplining of, or hear complaints or charges brought against a public officer. It actually does not specify that he has the right to negotiate his salary in closed session. More importantly, it is the Board's decision whether to go into closed session. He can make a request. It's your decision whether to grant or deny the request. Having this discussion is not violating any right that he has.

Commissioner Martin stated that he agrees that they waited for the letter from MERC and is sorry that there was a delay, but that's the way it is. Even though we waited for the letter from MERC, we should do no harm to Mr. Webber.



Chairperson Nolden stated that if we decide to go back and pay him the back pay and if we go back to the initial date he stated and he is receiving more compensation than what he is entitled to we're going to open up Pandora's box, I really believe. I know we need to have some discussion about that. This is my personal belief and am really concerned about that. Chairperson Nolden asked Commissioner Young to restate the motion.

Commissioner Young restated the motion: as requested, to recognize effective his hiring date for this position to pay him the higher rate of pay, which also recognizes that it's an exempt position

Commissioner Cousineau asked for clarification as to the adjustment of overtime.

Commissioner Young stated it would take off the overtime as being an exempt position.

Chairperson Nolden stated he cannot have it both ways.

**Motion:** To approve, effective Roy Webber's hiring date for this position, to pay him the higher rate of pay, which also recognizes that it's an exempt position.

**Action:** Approve, **Moved by** Young, **Seconded by** Henry. **Vote:** Motion failed (**summary:** Yes = 4, No = 4, Abstain = 0).

**Yes:** Ellenburg, Henry, Nolden, Young. **No:** Courts, Cousineau, Martin, Shapiro.

Ms. Galajda stated that as of July 7 her office recognizes the MERC ruling that the position is no longer in the bargaining unit. It will be recognized as exempt appointed. HR needs direction from this board. We need to know what the rate of pay is. If we have no other direction, we will leave it as is. We will have to go back to July 7<sup>th</sup> to see if there was any overtime.

**Motion:** To recognize the position effective July 7<sup>th</sup> and to adjust the rate of pay effective July 7<sup>th</sup>, without overtime, at the pay of previous employee in that position, Roberta Sacharski.

**Action:** Approve, **Moved by** Young, **Seconded by** Martin.

Commissioner Cousineau would like to go into closed session.

**Motion:** To approve going into closed session.

Action: Enter closed session, Moved by Cousineau, Seconded by Shapiro.

Motion withdrawn by Cousineau.

Assistant Corporation Counsel MacMillan asked to confer with Corporation Counsel Bell.

Prosecutor David Leyton stated the statute regarding closed sessions. "A public body may meet in a closed session only for the following purposes: to consider the dismissal, suspension, or disciplining of, to hear complaints or charges brought against, or to consider a periodic personnel evaluation of a public officer, employee, staff member or individual agent if the named person requests a closed hearing." Mr. Webber requested a closed hearing. "The person requesting the closed hearing may rescind the request at any time in which case the matter at issue shall be considered after the rescission only in open sessions."

Discussion ensued and it was decided Mr. Webber does not meet the criteria to go into closed session. Commissioner Cousineau withdrew his motion.

Commissioner Cousineau stated he wouldn't be able to support the current motion on the table, but would be able to support the previous motion that he voted no on earlier.

**Motion:** To recognize the position effective July 7<sup>th</sup> and to adjust the rate of pay effective July 7<sup>th</sup>, without overtime, at the pay of previous employee in that position, Roberta Sacharski.

**Action:** Approve, **Moved by** Young, **Seconded by** Martin. **Vote:** Motion passed (**summary:** Yes = 6, No = 2, Abstain = 0).

Yes: Courts, Ellenburg, Henry, Martin, Nolden, Young.

No: Cousineau, Shapiro.



**OLD BUSINESS** 

None



**NEW BUSINESS** 

G073117VIIA: Prosecuting Attorney: Request approval of overnight travel for up to four employees assigned to the Family Support Division to attend the Michigan Family Support Council 2017 Annual Fall Training Conference for the period of October 4-6, 2017 in Harbor Springs, MI at a cost not to exceed \$1,600.00 – Attached (ROLL CALL VOTE REQUESTED)

**Motion:** To approve overnight travel for up to four employees assigned to the Family Support Division to attend the Michigan Family Support Council 2017 Annual Fall Training Conference for the period of October 4-6, 2017 in Harbor Springs, MI at a cost not to exceed \$1,600.00.

Action: Approve, Moved by Young, Seconded by Courts.

**Vote:** Motion carried by unanimous roll call vote (**summary:** Yes = 8). **Yes:** Courts, Cousineau, Ellenburg, Henry, Martin, Nolden, Shapiro, Young.



G073117VIIB: Office of Sheriff: Request approval to accept a Homeland Security grant through the Regional 3 Homeland Security Protection Board in the amount of \$86,500 for an upgrade to the Emergency Operations Center (EOC) – Attached

**Motion:** To approve request to accept a Homeland Security grant through the Regional 3 Homeland Security Protection Board in the amount of \$86,500 for an upgrade to the Emergency Operations Center (EOC).

Action: Approve, Moved by Henry, Seconded by Martin.

Motion passed unanimously.



G073117VIIC: Human Resources: Request approval of the NVA contracts for two retiree plans for coverage beginning January 1, 2018 – Attached

**Motion:** To approve the NVA contracts for two retiree plans for coverage beginning January 1, 2018.

**Action:** Approve, **Moved by** Young, **Seconded by** Henry.

Motion passed unanimously.



G073117VIID: IT Department: Request approval to accept the renewal quotes for Software Assurance for the County's Mitel phone system and ESNA voice mail – Attached (ROLL CALL VOTE REQUESTED)

**Motion:** To approve the renewal quotes for Software Assurance for the County's Mitel phone system and ESNA voice mail.

Action: Approve, Moved by Courts, Seconded by Young.

**Vote:** Motion carried by unanimous roll call vote (**summary:** Yes = 8).

Yes: Courts, Cousineau, Ellenburg, Henry, Martin, Nolden, Shapiro, Young.



G073117VIIE: IT Department: Request approval of overnight travel for two employees to attend the MiGMIS (Michigan Chapter – Governmental Management Information Sciences) annual conference for the period of September 10-13, 2017 in Harbor Springs, MI at a cost not to exceed \$1,144.16 – Attached (ROLL CALL VOTE REQUESTED)

**Motion:** To approve overnight travel for two employees to attend the MiGMIS (Michigan Chapter – Governmental Management Information Sciences) annual conference for the period of September 10-13, 2017 in Harbor Springs, MI at a cost not to exceed \$1,144.16.

**Action:** Approve, **Moved by** Henry, **Seconded by** Cousineau.

**Vote:** Motion carried by unanimous roll call vote (**summary:** Yes = 8). **Yes:** Courts, Cousineau, Ellenburg, Henry, Martin, Nolden, Shapiro, Young.



G073117VIIF: Veterans Services: Request approval of overnight travel for two employees to attend the Michigan Association of County Veterans Counselors Fall Conference for the period of September 14-15, 2017 in Bay City, MI at a cost not to exceed \$350.00 – Attached

**Motion:** To approve overnight travel for two employees to attend the Michigan Association of County Veterans Counselors Fall Conference for the period of September 14-15, 2017 in Bay City, MI at a cost not to exceed \$350.00.

Action: Approve, Moved by Henry, Seconded by Cousineau.

Motion passed. Shapiro opposed.



G073117VIIG: Controller's Office: Request approval of August 2017 overtime requests in the amount of \$115,691 – Attached (ROLL CALL VOTE REQUESTED)

**Motion:** To approve August 2017 overtime requests in the amount of \$115,691.

Action: Approve, Moved by Henry, Seconded by Young.

**Vote:** Motion carried by unanimous roll call vote (**summary:** Yes = 8). **Yes:** Courts, Cousineau, Ellenburg, Henry, Martin, Nolden, Shapiro, Young.



Commissioner Young stated he was reviewing Robert's Rules of Order and it says "when voting by any method except by ballot if the result of the vote has been declared you can change your vote but only with the unanimous consent of the assembly without debate". Commissioner Cousineau had requested to change his vote. If he still wants to on the original issue regarding the exempt position, which would change it from a four to four tie, if everybody here agrees to. This is not open for debate—this is just a yes or no whether or not you're going to recognize another commissioner's right to change his vote. I would ask for us to vote whether or not we will recognize to change his vote if he still wishes. I'm trying to be respectful of the commissioners. Commissioner Cousineau stated he does wish to change his vote.

**Motion:** To allow Commissioner Cousineau to change his vote regarding the Chief Register of Deeds' issue.

Action: Approve, Moved by Young, None seconded.

**Vote:** Motion carried by unanimous roll call vote (**summary:** Yes = 8). **Yes:** Courts, Cousineau, Ellenburg, Henry, Martin, Nolden, Shapiro, Young.

Commissioner Young stated that that the original motion to recognize Mr. Webber's position back to his hire in date in November as an exempt position which would remove him from the overtime and give him a higher rate of pay as his predecessor had, and would nullify the second vote which was to recognize it as a July 7<sup>th</sup>.

Commissioner Young asked if that statement was correct. Chairperson Nolden and Mr. MacMillan agreed to the restated motion. Chairperson Nolden asked if we needed another vote. Commissioner Young stated no.

# VOTE WITH COMMISSIONER COUSINEAU CHANGING HIS VOTE (MOTION RESTATED BY COMMISSIONER YOUNG ABOVE)

**Motion:** To approve, effective Roy Webber's hiring date for this position, to pay him the higher rate of pay, which also recognizes that it's an exempt position.

**Action:** Approve, **Moved by** Young, **Seconded by** Henry. **Vote:** Motion passed (**summary:** Yes = 5, No = 3, Abstain = 0).

Yes: Cousineau, Ellenburg, Henry, Nolden, Young.

No: Courts, Martin, Shapiro.



OTHER BUSINESS

Closed session – John Gleason vs Genesee County, Case No. 16-107118

Assistant Prosecuting Attorney/Corporation Counsel Brian MacMillan stated the Open Meetings Act statement.

**Motion:** To approve going into closed session.

Action: Enter Closed Session, Moved by Cousineau, Seconded by Courts. Vote: Motion carried by unanimous roll call vote (summary: Yes = 8). Yes: Courts, Cousineau, Ellenburg, Henry, Martin, Nolden, Shapiro, Young.

Closed session began at 9:48 a.m. Open session began at 10:42 a.m.



**Motion:** To approve following the recommendations of Corporation Counsel in *Gleason* vs Genesee County, Case No. 16-107118.

Action: Approve, Moved by Young, Seconded by Henry.

Motion passed unanimously.



#### **ADJOURNMENT**

Motion: To adjourn the Governmental Operations Committee meeting.

Action: Adjourn, Moved by Nolden, Seconded by Henry.

Motion passed unanimously.

Chairperson Nolden adjourned the Governmental Operations Committee meeting at 10:43 a.m.

Transcribed by: Kimberly L. Cunningham Secretary/Stenographer RICHARD B. YUILLE CHIEF JUDGE GENESEE COUNTY DRUG COURT 630 S. SAGINAW ST. FLINT, MICHIGAN 48502 PHONE: (810) 424-4412 FAX: (810) 257-3602 SUSAN JOHNSON SUPERVISOR

#### **MEMORANDUM**

TO: Bryant Nolden, Chairperson – Governmental Operations Committee

FROM: Susan Johnson, Drug Court Supervisor

RE: D'n'A Drug and Alcohol Testing Services Contract

DATE: August 3, 2017

The Circuit Court Drug Court Program is seeking permission to extend the contract for substance abuse testing services with our current provider, D'n'A Drug and Alcohol Testing Center. We would like to extend the contract to cover an additional 12 months from 10-1-17 to 9-30-18.

No match of funding is required by the county as this will be financed by the state grants.

# AMENDMENT TO PROFESSIONAL SERVICES CONTRACT WITH D'n'A DRUG AND ALCOHOL TESTING CENTER FOR DRUG TESTING SERVICES FOR THE GENESEE COUNTY DRUG COURT PROGRAMS

This Amendment is effective October 1<sup>st</sup>, 2017, and is between Genesee County, Michigan, a Michigan municipal corporation whose principal place of business is located at 1101 Beach Street, Flint, Michigan 48502 (the "County"), and D'n'A drug and alcohol testing center, a Michigan Drug Testing Facility, whose principal place of business is located at 114 W Court St Flint MI 48502 (the "Contractor") (the Contractor and the County together, the "Parties").

WHEREAS, the Parties executed a professional services contract effective October 1<sup>st</sup>, 2016 (the "Agreement"), pursuant to which the Contractor would perform drug and alcohol testing; and

WHEREAS, the Parties wish to amend the Agreement to extend the contract for an additional one year.

NOW THEREFORE, the Parties agree as follows:

- The term of the Agreement is hereby extended by a period of 12 months, ending at 11:59pm on September 30<sup>th</sup>, 2018.
- 2. The remaining terms of the agreement remain unchanged and in full effect.
- 3. Execution of this Amendment is authorized by Resolution #\_\_\_\_\_issued by the Genesee County Board of Commissioners.

D'n'A drug and alcohol testing center	COUNTY OF GENESEE	
By: Mark Winston Vice President	By: Mark Young, Chairperson Board of County Commissioners	
Date:	Date:	
Approved as to form:		
Office of the Prosecutor-Civil Di	vision	

RICHARD B. YUILLE CHIEF JUDGE GENESEE COUNTY DRUG COURT 630 S. SAGINAW ST. • FLINT, MICHIGAN 48502 PHONE: (810) 424-4412 • FAX: (810) 257-3602

SUSAN JOHNSON SUPERVISOR

#### **MEMORANDUM**

TO: Bryant Nolden, Chairperson - Governmental Operations Committee

FROM: Susan Johnson, Drug Court Supervisor

RE: Catholic Charities of Shiawassee and Genesee Counties Contract

DATE: August 3, 2017

The Circuit Court Drug Court Program is seeking permission to extend the contract for outpatient substance abuse services with our current provider, Catholic Charities of Shiawassee and Genesee Counties. We would like to extend the contract to cover an additional 12 months from 10-1-17 to 9-30-18.

No match of funding is required by the county as this will be financed by the state grants.

# AMENDMENT TO PROFESSIONAL SERVICES CONTRACT WITH CATHOLIC CHARITIES OF SHIAWASSEE AND GENESEE COUNTIES FOR THE GENESEE COUNTY DRUG COURT PROGRAMS

This Amendment is effective October 1, 2017, and is between Genesee County, Michigan, a Michigan municipal corporation whose principal place of business is located at 1101 Beach Street, Flint, Michigan 48502 (the "County"), and Catholic Charities, a domestic Nonprofit Corporation, whose principal place of business is located at 901 Chippewa Street, Flint, MI 48503 (the "Contractor") (the Contractor and the County together, the "Parties").

WHEREAS, the Parties executed a professional services contract effective October 1, 2016 (the "Agreement"), pursuant to which the Contractor would perform the services of attending court reviews and enter data into DCCMIS; and

WHEREAS, the Parties wish to amend the Agreement to extend the contract for an additional one year.

NOW THEREFORE, the Parties agree as follows:

- The term of the Agreement is hereby extended by a period of 12 months, ending at 11:59pm on September 30<sup>th</sup>, 2018.
- 2. The remaining terms of the agreement remain unchanged and in full effect.
- 3. Execution of this Amendment is authorized by Resolution #\_\_\_\_\_ issued by the Genesee County Board of Commissioners.

#### Catholic Charities of Shiawassee

and Genesee County	COUNTY OF GENESEE	
By: Vicky L. Schultz Executive Director	By: Mark Young, Chairperson Board of County Commissioners	
Date:	Date:	
Approved as to form:		
Office of the Prosecutor-C	ivil Division	

CRIMINAL/CIVIL DIVISION Honorable Joseph J. Farah Honorable Judith A. Fullerton Honorable Archie L. Hayman Honorable Geoffrey L. Neithercut Honorable Richard B. Yuille

#### 900 SOUTH SAGINAW ST., FLINT, MICHIGAN 48502 810-424-4355

RICHARD B. YUILLE - CHIEF JUDGE BARBARA A. MENEAR - COURT ADMINISTRATOR **FAMILY DIVISION** Honorable Duncan M. Beagle Honorable F. Kay Behm Honorable John A. Gadola Honorable David J. Newblatt Honorable Michael J. Theile

To:

Commissioner Bryant Nolden

Chairperson, Governmental Operations Committee

From: Rhonda Ihm

Juvenile Section Administrator

Re:

Buckham Fine Arts contract agreement

Date:

August 14, 2017

Permission is being sought to enter into a Professional Services Contract with Buckham Fine Arts to provide the services outlined in the United Way Community Impact grant.

Permission to accept the United Way grant was given through resolution #17-309.

Your review of the request is appreciated and the Court will be represented at the Governmental Operations meeting.

#### PROFESSIONAL SERVICES CONTRACT

This Contract for Professional Services (the "Contract") is by and between the County of Genesee, a Michigan Municipal Corporation, whose principal place of business is located at 1101 Beach Street, Flint, Michigan 48502 (the "County"), and Buckham Fine Arts Project [Michigan Not-For Profit Corporation whose principal place of business is located at 134 !/2 W. Second St. Flint Michigan (the "Contractor") (the County and the Contractor together, the "Parties").

#### 1. Agreement and Authority

Execution of this Agreement is authorized by Resolution #\_\_\_\_\_ issued by the Genesee County Board of Commissioners.

#### 2. Term

#### 2.1 Initial Term

The initial term of this Contract commences on July 1, 2017 and shall be effective through June 30, 2018.

**Scope of Work**The Contractor agrees to perform the services described on Exhibit A (the "Services").

#### 4. Compensation

Budget Reimbursement. The County will reimburse the Contractor for approved expenses incurred by the Contractor in the performance of this Contract. The total amount paid to the Contractor under this Contract shall not exceed \$25,000. The Contractor's projected budget for the Initial Term of this Contract is attached as Exhibit C (the "Budget").

- 4.1 The County will not approve any expense not identified in the Budget, and the County will not approve any expenses in excess of the amounts identified in the Budget.
- 4.2 The Contractor must provide to the County monthly invoices in a form acceptable to the County, along with any supporting documentation such as time sheets and receipts for incurred expenses. The County will pay the Contractor within sixty (60) days of the County's acceptance of the invoice and supporting documentation.
- **5. Taxes.** The County is a Michigan Municipal Corporation. The Contractor acknowledges that the County is exempt from Federal Excise Tax and Michigan Sales Tax.

#### 6. Contract Administrator

The contract administrator for this Contract is Rhonda Ihm (the "Contract Administrator"). The Contractor acknowledges that the Contract Administrator is the primary County contact for notices and instructions related to this Contract. The Contractor agrees to provide a copy of all notices related to this Contract to the Contract Administrator.

#### 7. Warranties

The Contractor warrants that:

- 7.1 The Services will be performed in a good and workmanlike manner and in accordance with generally acceptable practices in the industry.
- 7.2 The Contractor will comply with all federal, state, and local laws in the performance of the Services.
- 7.3 The Contractor will comply with the requirements of any federal or state grants used to fund or support this Contract.
- 7.4 The Contractor will obtain and maintain all applicable licenses and permits necessary to provide the Services for the entire term of this Contract.

The Contractor agrees to indemnify and hold the County, its officials, officers, agents, and employees harmless from any and all claims, damages, or liability, including defense costs, arising out of the Contractor's breach of these warranties.

#### 8. Suspension of Work

#### 8.1 Order to Suspend Performance

Upon written order of the Contract Administrator, the Contractor agrees to immediately suspend performance of the Services. The Contractor shall not be entitled to compensation for any Services performed during any period in which the Contract Administrator has directed that the Services be suspended.

#### 8.2 Necessary Actions Before Suspension

If immediate suspension of the Services would cause harm, injury, or damage to persons or property, the Contractor must immediately notify the Contract Administrator of the nature of such harm, injury, or damage, and obtain written authorization from the Contract Administrator to take such necessary action as to prevent or minimize such harm, injury or damage. Actions authorized by the Contract Administrator pursuant to this paragraph are compensable.

#### 9. Termination

#### 9.1 Termination for Cause

If the Contractor is in breach of any provision of this Contract, and such breach continues for fourteen (14) days after written notice is issued to the Contractor by the County of the breach, the County may terminate this Contract. Such termination for cause is effective upon receipt of the notice of termination by the Contractor.

In addition to any other remedies provided by law or this Contract, the Contractor shall be responsible for all costs incurred by the County as a result of the Contractor's breach and termination, including any costs to obtain substitute performance.

#### 9.2 Immediate Termination

If the County, in its discretion, determines that the Contractor's breach of this Contract constitutes a threat to public health, safety, or welfare, the County may terminate this Contract immediately upon notice to the Contractor.

In addition to any other remedies provided by law or this Contract, the Contractor shall be responsible for all costs incurred by the County as a result of the Contractor's breach and termination, including any costs to obtain substitute performance.

#### 9.3 Termination for Convenience

If the County determines that it is in the County's best interests, the County may terminate this Contract upon thirty (30) days written notice to the Contractor.

The County shall pay for all work properly performed up to the effective date of the notice of termination:

#### 9.4 Termination for Lack of Funding

If this Contract is funded by public funds or a grant from a public or private entity, and the funds are not appropriated or the grant is discontinued, the County may terminate this Contract by written notice specifying the date of termination.

The County shall pay for all work properly performed up to the effective date of the notice of termination.

#### 10. Equipment Purchased with County Funds

10.1 The Contractor shall not purchase Equipment for the performance of this contract using funds provided by the County unless such purchase is clearly identified in a line item in Contractor's Budget.

#### 10.2 Reporting

The Contractor agrees that any Equipment purchased for the performance of the Services with funds supplied by the County under this Contract must be reported to the Contract Administrator upon purchase. For the purposes of this paragraph, Equipment is defined as tangible, non-expendable, personal property having useful life of more than 1 year and an acquisition cost of \$5,000 or more per unit.

#### 10.3 Conveyance to the County

Upon the County's request at the termination of this Contract for any reason, the Contractor agrees to convey to the County all title in any Equipment purchased for the performance of the Services with funds supplied by the County under this Contract.

#### 11. Nondiscrimination

The Contractor covenants that it will not discriminate against an employee or applicant of employment with respect to hire, tenure, terms, conditions, or privileges of employment, or a matter directly or indirectly related to employment, because of race, color, religion, national origin, age, sex, height, weight, marital status or a disability that is unrelated to the individual's ability to perform the duties of a particular job or position, and that it will require the same non-discrimination assurances from any subcontractor who may be used to carry out duties described in this contract. Contractor covenants that it will not discriminate against businesses that are owned by women, minorities or persons with disabilities in providing services covered by this Contract, and that it shall require the same assurances from subcontractors. Breach of this covenant shall be regarded as a material breach of this contract.

#### 12. Freedom of Information Act

This Contract and all attachments, as well as any other information submitted by the Contractor to the County, are subject to disclosure under the provisions of MCL 15.231, et seq., known as the "Freedom of Information Act".

#### 13. Intellectual Property

Any intellectual property created by the Contractor in the performance of the Services shall be considered a work made for hire, and any and all rights in such intellectual property shall belong solely to the County. Upon the County's

request, the Contractor agrees to execute any documents necessary to convey ownership of such intellectual property to the County.

#### 14. Audit Rights

#### 14.1 Certification of Accurate Information

Contractor certifies that all information provided to the County by the Contractor relating to the award or modification of this Contract, or any payment or dispute related to this Contract, is true and correct. The Contractor further certifies that its accounting system conforms to generally accepted accounting principles.

#### 14.2 Inspection

The Contractor agrees that the County may inspect the Contractor's plant, place of business, or worksite to ensure compliance with the terms of this Contract. If this Contract is funded or supported with any state or federal grant funds, the state or federal agencies responsible for administering the applicable grants may examine the Contractor's plant, place of business, or worksite to ensure compliance with the terms of this Contract and the terms of the applicable grant.

#### 14.3 Audit

The Contractor agrees that the County may examine the Contractor's records to ensure compliance with the terms of this Contract. If this Contract is funded or supported with any state or federal grant funds, the state or federal agencies responsible for administering the applicable grants may examine the Contractor's records to ensure compliance with the terms of this Contract and the terms of the applicable grant.

#### 14.4 Records Retention

The Contractor agrees to maintain any business records related to this Contract or the Contractor's performance under this Contract for a period of at least three (3) years after final payment.

#### 15. Identity Theft Prevention

- 15.1 In the event that the Contractor will obtain identifying information during the performance of the Services, the Contractor must take reasonable precautions to ensure that such identifying information is protected from unauthorized disclosure and is used only for the purpose of performing the Services.
- 15.2 For the purposes of this Paragraph, "identifying information" means any name or number that may be used, alone or in conjunction with any other

information, to identify a specific person, including but not limited to name, address, telephone number, social security number, date of birth, driver's license number, taxpayer identification number, or routing code.

#### 16. Insurance Requirements and Indemnification

The Contractor agrees to obtain insurance coverage of the types and amounts required as set forth in the Insurance Checklist attached as Exhibit B and keep such insurance coverage in force throughout the life of this Contract.

#### 16.1 Insurance Certificate and Additional Insured Coverage

The Contractor further agrees to provide certificates of insurance to the County evidencing the coverages specified in the Insurance Checklist, and including the County as an additional insured. Additional insured coverage is to be by proof of blanket additional insured coverage within the general liability policy or as provided by an endorsement specifying the County as an additional insured to the policy. Contractor's agent must provide a copy of the endorsement or language from the policy with the certificate of insurance.

#### 16.2 Indemnification

The Contractor agrees to indemnify and hold the County, its officials, officers, agents, and employees harmless from any and all claims, damages, or liability, including defense costs, arising out of the Contractor's performance of the Services or presence on the County's property or worksite.

#### 17. Independent Contractor

The Contractor and its agents and employees are independent contractors and are not the employees of the County.

#### 18. General Provisions

#### 18.1 Entire Contract

This Contract, consisting of the following documents and Exhibits, embodies the entire Contract between the Parties.

- 18.1.1. The Contract This Professional Services Contract
- 18.1.2. Exhibit A The Scope of Work
- 18.1.3. Exhibit B The Insurance Checklist
- 18.1.4. Exhibit C The Contractor's Budget

There are no promises, terms, conditions, or obligations relating to the Services other than those contained herein. In the event of a conflict between this Contract and any Exhibit, the terms of this Contract shall control.

#### 18.2 No Assignment

The Contractor may not assign or subcontract this Contract without the express written consent of the County.

#### 18.3 Modification

This Contract may be modified only in writing executed with the same formalities as this Contract.

#### 18.4 Binding Effect

The provisions of this Contract shall apply to and bind the heirs, executors, administrators, and assigns all of the parties hereto.

#### 18.5 Headings

The paragraph headings in this Contract are used only for ease of reference, and do not limit, modify, construe, and or interpret any provision of this Contract.

#### 18.6 Governing Law and Venue

This Contract is entered into under the laws of the State of Michigan. Any litigation between the Parties arising out of this Contract must be initiated within two years of the cause of action accruing and must be brought in a court of competent jurisdiction in Genesee County, Michigan.

#### 18.7 Severability and Survival

In the event that any provision of this Contract is deemed by any court of competent jurisdiction to be legally ineffective, such decision shall have no effect on the remaining provisions of this Contract.

#### 18.8 Interpretation

Each Party has had opportunity to have this Contract reviewed by legal counsel and has had equal opportunity to contribute to its contents. In the event of any dispute concerning the interpretation of this Contract, there shall be no presumption in favor of any interpretation solely because the form of this Contract was prepared by the County.

#### 18.9 Remedies

All remedies specified in this Contract are non-exclusive. The County reserves the right to seek any and all remedies available under this Contract and applicable law in the event that the Contractor fails to abide by the terms of this Contract.

IN WITNESS WHEREOF, the Parties have caused this Contract to be executed by their duly authorized agents.

**BUCKHAM FINE ARTS PROJECT** 

COUNTY OF GENESEE

Ву:	By:
Megan Kelly Executive Director	Mark Young, Chairperson Board of County Commissioners
Date:	Date:
Approved as to form:	
Prosecuting Attorney – Civil	Division

# **EXHIBIT A**SCOPE OF WORK

The Buckham Fine Arts Project agrees to provide the following services:

Develop, plan, and conduct weekly visual arts workshops at the Genesee Valley Regional Center (GVRC) for 36 weeks commencing 9/6/17 (total 36 workshops);

Develop, plan, and conduct two arts related workshops per week for 12 weeks for youth on probation. Workshops will be conducted at the Genesee County Juvenile Probation office or at a mutually agreeable appropriate location commencing 9/25/17;

Conduct monthly surveys of the youth in each program measuring changes in mood, self-esteem, and critical thinking abilities;

Provide monthly reports to the Contract Administrator detailing the number, ages, and names of all youth attending each workshop;

Provide monthly billing statements to the Juvenile Court Administrator;

Purchase all necessary supplies for each workshop and provide the Contract Administrator with all receipts;

Hire, train, and supervise all artist-instructors;

Provide all information necessary for the timely completion of any and all reports required by the United Way of Genesee County for the Community Impact Grant awarded 6/13/17.

#### **EXHIBIT C**

Contractor's Projected Budget July 1, 2017 – June 30, 2018

Line Item	United Way Grant Funding
Salaries	
Benefits	
Supplies	1,000
Travel/Meals	
Meetings	
Training	
Insurance	
Printing & Publishing	
Communications	
Contracts	24,000
Rent	
Other -administration	
OtherFund	
development	



# 67th District Court Administration

(810) 424-4390

To:

Commissioner Bryant Nolden, Chairperson

Government Operations Committee

Genesee County Board of Commissioners

From: Sarah Santini, Deputy Director of Court Operations

Melissa Lane, Probation Supervisor

CC:

Judge Yuille, Chief Judge

Judge Odette, Presiding Judge

Date: August 7, 2017

Re:

Agenda Items for August 14, 2017 GOC Meeting

Request to Extend Contract for D'n'A for Sobriety Court

The 67<sup>th</sup> District Court respectfully requests approval to extend the Drug Testing Services Contract with Drug and Alcohol Testing Centers, Inc. (D'n'A) set to expire September 30, 2017, for one year. The contract is to provide monitored drug testing that adhere to all local, state and federal regulations concerning confidentiality. statute and required and best practices, by trained, qualified staff, to Sobriety Court participants at a low cost and for data entry into the Drug Court Case Management Information System (DCCMIS).

ROLL CALL VOTE REQUESTED.



# 67th District Court Administration

(810) 424-4390

To: Commissioner Bryant Nolden, Chairperson

Government Operations Committee Genesee County Board of Commissioners

From: Sarah Santini, Deputy Director of Court Operations

Melissa Lane, Probation Supervisor

CC: Judge Yuille, Chief Judge

Judge Odette, Presiding Judge

Date: August 7, 2017

Re: Agenda Items for August 14, 2017 GOC Meeting

Request to Extend Contract for Flint Odyssey House Inc. for Sobriety Court

The 67<sup>th</sup> District Court respectfully requests approval to extend the Substance Abuse Treatment Contract with Flint Odyssey House Inc. (FOH), set to expire September 30, 2017, for one year. The contract is to provide Substance Abuse Counselors (SAC) for care coordination in pre-court reviews, court hearings, delivery of treatment services, and clinical documentation into the Drug Court Case Management Information System (DCCMIS).

ROLL CALL VOTE REQUESTED.



# Office of Genesee County Sheriff

### SHERIFF ROBERT J. PICKELL

UNDERSHERIFF CHRISTOPHER SWANSON

ADMINISTRATIVE SECRETARY PAM COOKINGHAM

1002 S. SAGINAW STREET, FLINT, MI 48502 810-257-3407 810-257-3077-FAX

August 7, 2017

**MEMORANDUM** 

TO:

Chairperson Bryant Nolden

Governmental Operations

FROM:

Sheriff Robert J. Pickell

SUBJECT: 2017 MARINE SAFETY PROGRAM GRANT AGREEMENT

This is a request to approve the 2017 Marine Safety Program Grant Agreement between the Office of Genesee County Sheriff and the Michigan Department of Natural Resources (MDNR) in the amount of \$24,200.00. The agreement period is January 1, 2017 through December 31, 2017. These funds will be deposited into Account #101-3160-23105.

The grant provides funding for the Office of Genesee County Sheriff's Marine Division.

Approval of this request provides authorization for Sheriff Robert J. Pickell to sign this agreement.

I am requesting a **ROLL CALL VOTE** in order for this agreement to be signed and returned to MDNR as soon as possible.



#### GENESEE COUNTY OFFICE OF THE TREASURER

1101 Beach Street, Suite 144 Flint, Michigan 48502-1475

### **Deborah L. Cherry**

**TO:** Bryant Nolden, Chairperson

Governmental Operations Committee

Genesee County Board of Commissioners

**FROM:** Deborah Cherry, Treasurer

**DATE:** August 1, 2017

**RE:** Accounting System Coordinator Job Title Change

The Treasurer's Office is requesting that the job title of Accounting System Coordinator (currently held by Isaiah Matan) be changed to Treasury Operations Supervisor. We feel that the new job title is a better description of what the job entails. All job duties and union classification will remain the same.

Your favorable consideration in this matter is appreciated.

# John G. Battles Friend of the Court

Anthony McDowell
Deputy Friend of the Court

Genesee County Adm. Bldg. 1101 Beach St., Suite 111 Flint, Michigan 48502-1474 Telephone: (810) 257-3300

### **MEMORANDUM**

DATE:

August 3, 2017

TO:

Honorable Byrant W. Nolden, Chairman

**Governmental Operations** 

FROM:

John G. Battles

Friend of the Court

RE:

Agenda Item For August 14, 2017 GOC Committee Meeting

Michigan Family Support Council Conference

The Genesee County Friend of the Court is seeking Board approval to send ten (9) employees to the Michigan Family Support Council Conference in Boyne Highlands from October 4, 2017 through October 6, 2017. A copy of the Conference Agenda is attached.

The total cost for registration to attend this conference is expected to be \$3248.22. The expense to attend this conference is 100% covered by our cooperative reimbursement grant which reduces the county expenditure for employees to attend this conference to \$1104.39. The Friend of the Court is not seeking additional county appropriation to attend this conference.

Respectfully Submitted,

John G. Battles

Genesee County Friend of the Court

sm

cc: Controller

Corporation Counsel Human Resource



## AGENDA

# Wednesday, October 4, 2017

9:00 to 4:00	Conference Registration Green Room	
9:00 to 6:00	Silent Auction Bidding Green Room	
9:30	MFSC Board Meeting	
11:00 to 1:00	Lunch (included in hotel reservations)	
1:30 to 3:00	Workshops Session A	
3:00 to 3:15	<ul> <li>CALC for Newbies</li> <li>DV Training</li> <li>Implicit Bias/Procedural Justice</li> <li>Introduction to Intergovernmental Child Support</li> <li>C.O.D.E.</li> <li>Security Presentation</li> <li>Helpful Hints for Completing a Child Support Review</li> </ul> Refreshment break	
3:15 to 5:00	Plenary Session Welcome- Sheila Waldrop Program Notes - Pam Sala Awards Key Note - Linda Larsen	and
5:30 to dusk	Horseback Riding	

5:30	Segway Tour (one each day)	
5:30 to dusk	Ski Lift	
5:30 to dusk	Zipline	
5:30 to 9:30	Dinner	
6:00 to 7:00	Hospitality w/ Sean & Tom	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
7:00 to 9:00	Odawa Casino Bus	
7:00 to 9:00	Bonfire & S'mores	
7:00 to 11:00	Caricaturist	Zoo Bar Basement
7:30 to 9:00	Silent Auction Bidding	
9:00 to 11:00	Coloring Contest	Camelot
9:30 to 11:30	DJ/Photo Booth	Zoo Bar
	Thursday October 5, 20	<b>117</b>
6:30 to 8:30	Thursday, October 5, 20 Breakfast	<b>,1</b> /
8:00 to 2:00	Conference Registration	Green Room
8:00 to 5:00	Silent Auction Bidding	Green Room
8:30 to 5:00	MiCSES Learning Lab	Fireplace Room
9:00 to 10:30	<ul> <li>Workshops Session B</li> <li>SS Panel Q &amp; A</li> <li>Advanced CALC and Ti</li> <li>New PA/support Staff T</li> </ul>	-

- Panel with Facilitator. Discussion on Friend of the Court Custody and Parenting Time Investigations and Enforcement When Child Protect Services is Involved
- o Intergovernmental Panel Discussion
- o Collaboration Workgroup
- Imputation

#### 10:45 to 12:15 Workshops Session C

- o New PA/support Staff Training Part 2
- Intergovernmental FOC Scenarios
- Contract Performance Standards for PA
- o Paternity Outreach
- o Reaching out to the Undecided
- o Setting Support in Neglect and Abuse Guardianship, and Foster Care Cases

# 12:15 to 1:30 Lunch. Both Dining Rooms and Slopeside Bar & Terrace

### 1:30 to 3:00 Workshops Session D

- Intergovernmental PA Scenarios
- Contract Performance Standards for FOC
- Friend of the Court Association (FOCA) Liaison Who am I and what I do for you!
- Financial Planning
- o Difficult Child Support Review & Calculation Issues
  - In advance of this workshop those who plan to attend should forward questions to Bill Bartels (<u>BarteslB@courts.mi.gov</u>) or Paul Gehm (<u>GehmP@courts.mi.gov</u>)
- ADAPT

#### 3:00 to 3:15 Refreshment break

### 3:15 to 4:45 Workshops Session E

0	Calculating Income for Self-Employed, Commissions,
	Bonuses

- o How my Work Impacts Others
- Legislative & Case Law Updates, Court Rules and SCAO Policy
- o Intergovernmental New UIFSA Forms
- o Locate
- o Federal Regulations

5:30 to dusk	Horseback riding	
5:30 to dusk	Zipline	
5:30 to dusk	Ski Lift	
5:30	Segway Tour (one each day)	en. 1945 - Lander Mariana 1948 - Mariana
5:30 to 9:30	Dinner	Maria da Para de Caración de C
6:00 to 7:00	Hospitality w/ Sean & Tom	
7:00 to 9:00	Odawa Casino Bus	
7:00 to 9:00	Bonfire & S'mores	
7:00 to 11:00	Caricaturist	Zoo Bar Basement
7:30 to 9:00	Pick Up Silent Auction Items	Green Room
7:30 to 11:30	Euchre	Zoo Bar Basement
9:00 to 11:00	Coloring Contest	Camelot
9:30 to 11:30	DJ/Photo Booth	Zoo Bar

## Friday, October 6, 2017

7:30 to 8:45 Breakfast

8:00 to 10:30 Pick-up Silent Auction Items Workshop Session F 8:45 to 10:15 o PA Forum o Safety - How to Create a Safe Work Space o Innovative Child Support Enforcement Self-Assessment Audit/Case Closure o Leadership vs Management o Reports Organization o Mediation Skills/Helpful Tools Refreshment Break 10:15 to 10:30 10:30 to 12:00 Plenary New Strategic Plan - Erin Frisch/Steve Capps Presentation to Ele's Place Silent Auction Surprise – must be present to win

## Cunningham, Kim

From:

Mills, Stephanie

Sent:

Friday, August 04, 2017 9:35 AM

To:

Freeman, Josh; Agendaitems; Courts, Kim; Nolden, Bryant; Hawkins, Joy; Primeau, Kristie;

Bell, Celeste; Galajda, Anita

Subject:

RE: agenda item for 8.14.17 GOC mtg

My apologies...

The fund number is 215.

We are seeking approval to send 9 employees (not ten).

Stephanie Mills | Administrative Secretary | Genesee County Friend of the Court

Phone: 810.257.3300 | Direct: 810.257.3173 | Fax: 810.257.3244 Email: smills@co.genesee.mi.us | Website: http://www.gc4me.com

Address: 1101 Beach Street, Flint, Michigan 48502

----Original Message-----From: Freeman, Josh

Sent: Friday, August 04, 2017 8:57 AM

To: Mills, Stephanie <SMills@co.genesee.mi.us>; Agendaitems <Agenda-items@co.genesee.mi.us>; Courts, Kim

<KCourts@co.genesee.mi.us>; Nolden, Bryant <BNolden@co.genesee.mi.us>; Hawkins, Joy
<JHawkins@co.genesee.mi.us>; Primeau, Kristie <KPrimeau@co.genesee.mi.us>; Bell, Celeste

<CBell@co.genesee.mi.us>; Galajda, Anita <AGalajda@co.genesee.mi.us>

Subject: RE: agenda item for 8.14.17 GOC mtg

What is the fund number that the County's portion is going to be paid from?

Joshua M Freeman Board Coordinator Genesee County Board of Commissioners 1101 Beach St Room 312 Flint MI 48502

(810) 762-7762 Office (810) 397-3797 Cell jfreeman@co.genesee.mi.us

----Original Message-----From: Mills, Stephanie

Sent: Friday, August 04, 2017 8:26 AM

To: Agendaitems; Courts, Kim; Nolden, Bryant; Hawkins, Joy; Primeau, Kristie; Bell, Celeste; Galajda, Anita

Subject: agenda item for 8.14.17 GOC mtg

Please see attached.

Stephanie Mills | Administrative Secretary | Genesee County Friend of the Court

Phone: 810.257.3300 | Direct: 810.257.3173 | Fax: 810.257.3244 Email: smills@co.genesee.mi.us | Website: http://www.gc4me.com

Address: 1101 Beach Street, Flint, Michigan 48502





#### **MEMORANDUM**

To:

Bryant Nolden

Chairman, Government Operations Committee

From:

Mark Valacak, M.P.H.

Health Officer

Date:

August 14, 2017

Subject:

Request for Overnight Travel for 2017 Governmental Finance and Administrators

Seminar

Requested Action

Board approval and referral by the Health Officer to the appropriate committee of the Board of Commissioners.

Conference/Location:

2017 Governmental Finance & Administrators Seminar,

Mt. Pleasant, MI

Date(s):

September 14 – September 15, 2017

Attendee(s):

Ingrid Fink, Accounting Supervisor

Kim Borse, Accountant

Amount:

\$315.50 approximately includes conference cost, lodging and meals

**Funding Account:** 

6010.6010.0889

Funding Source:

Indirect Costs

Purpose:

To obtain current information and updates regarding reporting, system

updates, and other auditing requirements.

Discussion

The 2017 Governmental Finance & Administration Seminar for Local Public Health in Mt. Pleasant, MI on September 14 – September 15, 2017 is sponsored by MALPH and provides professional education in the areas of Full Cost Settlement Reporting and Audit Updates. **No county appropriation is required.** 

#### GENESEE COUNTY HEALTH DEPARTMENT OVERNIGHT TRAVEL REQUEST

Name: Ingrid Fir	ık					Date:	8/3/2017
Conference Title:	2017 Go	vernment	tal Financ	e & Adminis	strators Semi	nar	
Date(s) of Conference:	09/14/17	& 15, 201	17	Location	Mt. Pieasar	nt	
Charge to:	Departme	nt: 6010		Acct (choose	one):	46495	
is overtime requested?	1	No_x	_		Yes		
					# of hours		
		Ex	penditure [	Detail			
Personal Vehicle Mileas (If over 50 m Airfare:		nust attain ap	_ Miles @ oproval)	\$0.57	5 per mile=	<u> </u>	\$0.00
Other Transportation Co	osts (detail	):	Col	unty Car		_	\$0.00
Conference Registration	n:					T	\$100.00
Lodging:	1	_ nights @	\$81.00	per night=		_	\$81.00
# of Meals:	0 0 1	_ bkfst @ _ lunch @ _ dinner @	\$9.00	+ .90 tip= + 1.35 tip= + 2.25 tip=	\$6.90 \$10.35 \$17.25	\$0.00 \$0.00 \$17.25	
Other costs (detail):					_	_	\$17.25
Prepayments requeste Airfare: Lodging Deposit: Registration Fees:	d: \$81.0 \$100.0				TOTAL	COSTS: =	\$198.25
Other:		_	TOTAL PR	REPAYMENTS	REQUESTED:	_	\$181.00
			ALLOWAE	BLE ADVANCE	PAYMENT:		\$17.25
Supervisor:		1	AFFROVAL			Date:	3
Division Director:	//	• 1	, //			Date: _	
Accounting:	In	sel	Uv	W_	***************************************	Date: _	8.3,17
Health Officer:						Date:	

# 2017 GOVERNMENTAL ADMINISTRION AND FINANCE SEMINAR FOR LOCAL HEALTH DEPARTMENTS

This is an opportunity for local health department staff to be updated on the latest government accounting and financial management practices. To take full advantage of this seminar, local health departments are encouraged to send more than one representative – teamwork is an essential element of good fiscal practice.

#### SEMINAR INFORMATION

Date:

Thursday

September 14, 2017

All day

Friday

September 15, 2017

Half day until 12:00 pm

Place:

Comfort Inn

2424 S. Mission St. Mt. Pleasant MI

A block of guestrooms has been reserved at the Comfort Inn. You may make your own reservation by calling (989) 772-4000. The guestroom rate is \$75 single/double occupancy. Please present a tax-exempt certificate at check-in. Deadline for reserving a room under our block is August 23, 2017. Please identify with the MALPH group code to receive this special rate. After August 23<sup>th</sup> rooms will be released to public and may or may not be available at this rate.

Fees:

\$80 one day or \$100 both days per person (includes breaks and lunch). Please complete

the attached registration and/or cancellation form.

Contact:

Kraig Smith

Phone: 269-927-5610 Fax: 269-926-8129

Email: ksmith@bchdmi.org

Cancellations: The MALPH Administrators Forum reserves the right to cancel this seminar on or before August 23, 2017, in which all registration fees will be refunded. Individual registrants may also cancel their registrations and be eligible for full refund, if done on or before August 23, 2017.

## PUBLIC HEALTH ADMINISTRATORS FORUM

The Public Health Administrators Forum will be holding their annual meeting on Friday, September 15, 2017 from 12:15 – 2:00 pm at the Mt. Pleasant Comfort Inn following the Governmental Accounting Seminar. Lunch is provided. All Forum members and seminar participants are encouraged to attend.

L	1		IV	ALPH			
1 2	PUBLIC HEALTH ADMINISTRATORS FORUM						
3	2017 GOVERNMENTAL FINANCE & ADMINISTRATION SEMINAR FOR LOCAL PUBLIC HEALTH						
4	Comfort inn 2424 S. Mission St., Mt. Pieasant M.						
5							
- 5	9			,			
7	Ju/=DU=05.						
9	WEDNESDA	Y, SEPTEME	BER 13:				
10	014:00 - 6:00		Mentor and Mentee Meeting	Bill Matson, Marquette County Health Department			
1 11	THURSDAY.	CERTEMBE	F-22				
13		SEPTEMBE	K 14:	PRESENTERS			
14	18:30 - 8:45		Registration & Networking				
15							
16	18:45 - 9:00		Welcome	Rachel Snymkiew, Oakland County Public Health			
	19:00 - 9:45		The State of Public Health Update	Sup Morar, Michigan Franchisco			
19			- Inc. Sano Fishini Obdate	Sue Morar., Michigan Department of Health & Human Services			
20	19:45 - 10:00		Break				
21	110:00 - 11:00	Session A.	Full Cost Settlement Reporting	Chaus Indiana Maria			
23		2 2001011 71	, an oost ostnement Reporting	Steve Ireland, Michigan Department of Health & Human Services Tammy Stevens, Michigan Department of Health & Human Services			
24		or		Tariffy Stevens, Michigan Department of Realth & Human Services			
25 26	10:00- 12:00	Session B	Billing Break-out	Health Plans- Blue Cross Complete, United Health Care and McLaren			
	111:00 - 12:00		Data Bridges				
28			Pata Progec	Jim Colins			
_	12:00 - 1:00		Lunch / Networking				
30	11:00 - 2:30	Session A	Audit update / Ask the Auditor				
32	1.00 - 2.30	Or Or	Addit update / Ask the Additor	Stephen Blann, Renmann Robson			
_	1:00 - 2:30	Session B	Billing Break-out	Billing Round Table / Compare what others are billing (CPT Comparison)			
34	2:30 - 2:45			The state of the s			
36	12.30 - 2.45		Break				
			LHDs and Medicaid Health Plans Partner STD &				
_	2:45 - 4:30		HEDIS Update	Diana Criss (Health Management Associates Senior Consultant)			
38	4:30			Constitution of the second of			
40	4.30		Adjourn				
41	FRIDAY, SEPT	TEMBER 15:					
42							
13	9:00 - 9:30		IMALPH Update	Meghan Swain Mighigan Acceptation for L. L. L. L.			
14				Megnan Swain. Michigan Association for Local Public Health			
			Integrating the use of the Electronic Medical Record used by the local health system with our public health programs in the Health Department, how this work benefits both, the value that is added				
5 19	9:30 -10:30		and longer range plans for how we want to further integrate use of the EMR in our public health work.	Dishard Thomas I all and a			
6			The state of the s	Richard Thoune Jackson County			
	10:30- 10:45		Break				
8	10.45 4:55						
9 '	10:45 - 11:30		SIM Project Update	Meghan Vanderstelt			
-	11:30 - 12:00		Admin Forum Monting	;			
2	1.00 - 12.00		Admin Forum Meeting Includes Mentor / Mentee update	Rachel Shymkiew, Oakland County Public Health			
3			includes Mentor / Mentee update	Bill Matson, Marquette County Health Department			
-	12:00		Lunch				
5							
	Adjourn						

## REGISTRATION/CANCELLATION FORM

MALPH, Administrators Forum  Governmental Administration & Finance September 14-15, 2017	Seminar	Please I Thursday	ndicate: Friday K Both
Name Ingrid Fink Health Department Title Acco Business Phone 810 - 237 - 61 Email Address I Fink & gchd. Street 630 S. Saginaw St CityFlint State WI Zip 48502	VS	Denvisor	
September 10 (10:00 - 11:00):	Session A S	ession B	
September 10 (1:00 - 2:00):	Session A	Session B	
Please make your check payable to MAI \$80 one day or \$100 both days per parti	_PH – Administrators cipant by August 23	s Forum and retu , 2017	urn with registration form(s).
To: Kraig Smith PO Box 72 Sodus, MI 49	9126		
If paying by Credit card contact:			
Jennifer H Brassow Phone # (734) 544-	2957		
For Office Use Only:			
AmountCheck #	_Date	DRT#	_Refund
Cancellation Fax to ( ) by Augu	ıst 23, 2015		
Name:		DH	

Subject: Reservation Confirmation for Thursday, Sep 14, 2017

From: Comfort Inn & Suites and Conference Center (yourstay@choicehotels.com)

To: wmu\_ing@yahoo.com;

Date: Thursday, August 3, 2017 11:20 AM

ChoiceHotels.com

View Online/Printer-Friendly Version



Rested. Set. Go.

Comfortinn.com

Join Choice Privileges®. It's Free!

Dear Ingrid Fink,

We're pleased to confirm your upcoming stay at the Comfort Inn & Suites and Conference Center, Mount Pleasant, MI. Below is information about your stay to help you prepare for your trip.

**NEW!** Earn a Your Extras benefit like bonus points or an Amazon.com gift card on stays that include a Su-Th night.† Choose yours before checking in.

See you soon!

Name: Ingrid Fink

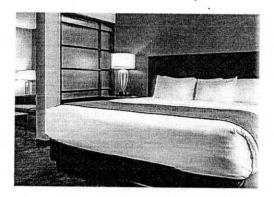
Confirmation Number: 539486242 Reservation Status: Reserved

Check In: Thursday, Sep 14, 2017 (4:00 PM) Check Out: Friday, Sep 15, 2017 (12:00 PM)

Number of Rooms: 1

View Reservation Details

Please note: Pet Accommodation: \$20 USD per night.



Comfort Inn & Suites and Conference Center

2424 S. Mission St.,

Mount Pleasant, MI, US, 48858

+1 (989) 772-4000



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#### More about Comfort Inn®

Amenities may vary by location.

Name: Ingrid Fink

Confirmation Number: 539486242 Reservation Status: Reserved

Check In: Thursday, Sep 14, 2017 (4:00 PM) Check Out: Friday, Sep 15, 2017 (12:00 PM)

Rate Program: GROUP~



Was this information Helpful? How can we do better? letusknow@choicehotels.com

Cancellation Deadline: If you need to change or cancel this reservation, you may do so up until Thursday, Sep 14, 2017 before 4:00 PM hotel time. The reservation cannot be cancelled through email.

Room De	escription	Max Room Occupancy	Adult (s)	Children	Extra Bed	Nightly Rate
THE S	2 Queen Beds, No Smoking FREE Full Breakfast, Pillow top Mattress, Microwave and Refrigerator, T.V LCD, Cable/Satellite TV, Desk with Ergonomic Chair, Free High-Speed Wireless, Non-Smoking Rooms Available	4 persons	1		None	Sep 14, 2017 for 1 night \$75.00
Cancellation Deadline: If yo do so up until Thursday, Sep cannot be cancelled through	ou need to change or cancel of 14, 2017 before 4:00 PM ho email.	this reservation, you m tel time. The reservation	ay on	*Estimated T Other C Estimated	harges:	\$75.00 \$6.00 <b>\$81.00</b> (US Dollar)

## **Guarantee Policy**

Your room will be held until 7:00 AM the morning following your scheduled arrival date. If you do not arrive and do not cancel your reservation by the cancellation deadline, your credit card will be charged 1 night's stay plus tax.

Reservations may be changed or cancelled, without a charge, via one of the following methods:

- · From our View/Change/Cancel Reservation page.
- By calling our Reservations Center in the U.S. or Canada and giving them your confirmation number.
- · By calling the hotel directly.





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- · Redeem points for gift cards from leading national retailers and restaurants
- · Elite status makes your membership even more rewarding at 10, 20 and 40 nights
- Create your online account and expedite your reservations
- Complimentary newspaper (excl. Suburban) and High-speed Internet (excl. Rodeway Inn)

View Program Details and Benefits

## Stay Connected

































\*As taxes and service charges may change from the time a reservation is placed until the actual stay and during the actual stay, the total price is an estimate. Check with your specific hotel for details.

<sup>†</sup> Some benefit options such as the Amazon credit, coffee card, gas savings, and Uber trip discounts are not available at all Choice Hotels locations. May only be earned on qualifying point-eligible stays that include at least one Sunday through Thursday night. United States based members have the option of selecting one from the following: 500 Choice Privileges bonus points, 100 airline miles (from participating airline carriers), \$.020/gallon in gas savings, \$2.50 Amazon.com credit, \$5 coffee card, and \$2.50 Uber trip discount.

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## Attachments

• TEXT.txt (58.27KB)

## GENESEE COUNTY OVERNIGHT TRAVEL REQUEST

Date: 8/3/2017 Kim Borse Name: Governmental Administration & Finance Seminar for Local Health Departments Conference Title: Location: Mt. Pleasant Date(s) of Conference: 9/14/2017-09/15/2017 60020 Charge to: Department: 6010 Acct (choose one): Expenditure Detail \$0.535 per mile= Personal Vehicle Mileage: Miles @ \$0.00 (If over 50 miles you must attain approval) Airfare: Other Transportation Costs (detail): County Car Conference Registration: \$100.00 Lodging: 0 nights @ \$75.00 per night= \$0.00 \$0.00 # of Meals: bkfst@ \$6.00 + .90 tip= \$6.90 \$10.35 \$9.00 + 1.35 tip= \$0.00 lunch @ \$17.25 dinner @ \$15.00 + 2.25 tip= \$17.25 \$17.25 Other costs (detail): TOTAL COSTS: \$117.25 Prepayments requested: Airfare: Lodging Deposit: \$100.00 Registration Fees: Other: TOTAL PREPAYMENTS REQUESTED: \$100.00 ALLOWABLE ADVANCE PAYMENT: \$17.25 **APPROVALS** Supervisor: Date: Date: \_\_\_ Director: Date: 8.3,1) Accounting:

Date:

Health Officer:

## 2017 GOVERNMENTAL ADMINISTRION AND FINANCE SEMINAR FOR LOCAL HEALTH DEPARTMENTS

This is an opportunity for local health department staff to be updated on the latest government accounting and financial management practices. To take full advantage of this seminar, local health departments are encouraged to send more than one representative - teamwork is an essential element of good fiscal practice.

#### SEMINAR INFORMATION

Date:

Thursday

September 14, 2017

All day

Friday

September 15, 2017 Half day until 12:00 pm

Place:

Comfort Inn

2424 S. Mission St. Mt. Pleasant MI

A block of guestrooms has been reserved at the Comfort Inn. You may make your own reservation by calling (989) 772-4000. The guestroom rate is \$75 single/double occupancy. Please present a tax-exempt certificate at check-in. Deadline for reserving a room under our block is August 23, 2017. Please identify with the MALPH group code to receive this special rate. After August 23th rooms will be released to public and may or may not be available at this rate.

Fees:

\$80 one day or \$100 both days per person (includes breaks and lunch). Please complete the attached registration and/or cancellation form.

Contact:

Kraig Smith

Phone: 269-927-5610 Fax: 269-926-8129

Email: ksmith@bchdmi.org

Cancellations: The MALPH Administrators Forum reserves the right to cancel this seminar on or before August 23, 2017, in which all registration fees will be refunded. Individual registrants may also cancel their registrations and be eligible for full refund, if done on or before August 23, 2017.

## PUBLIC HEALTH ADMINISTRATORS FORUM

The Public Health Administrators Forum will be holding their annual meeting on Friday, September 15, 2017 from 12:15 - 2:00 pm at the Mt. Pleasant Comfort Inn following the Governmental Accounting Seminar. Lunch is provided. All Forum members and seminar participants are encouraged to attend.

## REGISTRATION/CANCELLATION FORM

MALPH, Administrators Forum		Please	Indicate:
Governmental Administration & F September 14-15, 2017	inance Seminar	□ Thursday	Friday <b>X</b> Both
Name Kim Borse			
Health Department G.C. Title A	Countant		
Business Phone 810 257-	- 3334		
Email Address KBorse & go	chd.us		
Street 430 S. Sagina			
City Flint State Mi Zip 48			
September 10 (10:00 - 11:00):	☆ Session A	□ Session B	
September 10 (1:00 - 2:00):	Session A	□ Session B	
Please make your check payable \$80 one day or \$100 both days pe	to MALPH – Admini er participant by Aug	istrators Forum and rel gust 23, 2017	turn with registration form(s).
To: Kraig Smith PO Box 72 Sodus	, MI 49126		
If paying by Credit card contact:			
Jennifer H Brassow Phone # (734	5) 544-2957		
For Office Use Only:			
AmountCheck #	Date	DRT#	_Refund
Cancellation Fax to ( ) by	y August 23, 2015		
Name:		LDH	



## **Genesee County Information Technology**

1101 Beach Street, 2<sup>nd</sup> Floor Flint MI 48502 Christopher A. Newell, CIO

Phone: (810) 237-6103 Fax: (810) 257-3380

**TO:** Bryant Nolden, Chairperson

**Government Operations Committee** 

FROM: Christopher A. Newell, CIO

DATE: August 8, 2017

**RE:** Travel Request

The Information Technology Department submitting this request for approval for the CIO to attend the CGI Forum 2017 annual conference October 22<sup>rd</sup> to October 24<sup>th</sup> in Orlando, FL. The focus in on education, collaboration and community. This forum is for government professionals to share experiences and best practices through networking and specific training sessions. The full conference brochure is attached.

If travel is approved, I have been asked to participate in session 148 – "CGI Advantage360 Technical and Operations Client Panel Discussion"

#### Cost:

Conference begins late Sunday and ends at 5:45 on Tuesday. Flight availability dictates a Tuesday night stay and a Wednesday return.

Item	QTY	Cost	Total	Remarks
Conference	1	\$950.00	\$950.00	Genesee County's annual subscription/support fees
				include one "prepaid" forum registration
Hotel	3	\$223.88	\$671.64	Conference room rate (\$199.00, est. taxes \$24.88)
Ground	2	\$50.00	\$100.00	Estimated van shuttle to hotel.
Transport				
Airfare	1	\$600.00	\$600.00	Estimated \$400.00-600.00 based on availability
Checked	2	\$25.00	\$50.00	
bag				
Non	4	\$25.00	\$100.00	Subject to applicable per-diem limits; Anticipated Lunch
included				Sunday during travel, Sunday dinner, Breakfast and
meals				Lunch Wednesday during travel
Estimated to	tal		\$2471.64	

Estimated total cost \$2471.64

Once approved, air reservations and ground transport will be arranged with Purchasing to allow coordination with any other attendees.

## **Action Requested:**

I am seeking approval of this request by the Government Operations Committee, for consideration and approval by the full Board of Commissioners at their next regularly scheduled meeting.

# CGI FORUM 2017 for the CGI Advantage community **OCTOBER 22 – 24** Loews Sapphire Falls Orlando, Florida

# Contents

Overview  Dates and location  Why attend?  Users' Group Steering Committee	1
Education Schedule-at-a-glance Sessions by Field of Study Session descriptions	4
Collaboration  Networking  Keynote speaker  Showcase  Peer-to-peer roundtable luncheon	22 22
Community  Past attendees  Networking events	27
Plan to attend  Registration  Hotel information  Transportation	29
Build your schedule	30

## Overview

## Dates

October 22 – 24, 2017

## Location

Inside Universal Orlando theme park, the Loews Sapphire Falls overlooks a lagoon and is a 12-minute walk from Universal's Islands of Adventure.

## Why attend?

CGI Forum 2017 is the premier networking and educational event for the CGI Advantage® community. With numerous in-depth product sessions and abundant networking opportunities, the Forum is the must-attend event for government professionals to share experiences and best practices with peers and experts in the field. This can't-miss event provides a unique experience including:



#### **Education**

- Select from 80+ product-focused breakout sessions covering all CGI Advantage modules
- Earn Continuing Professional Education (CPE) credits



#### Collaboration

- Hear best practices & lessons learned from your peers
- Contribute directly to planning for future product releases



## Community

- Join the onsite community of 550+ CGI Advantage users
- Network with and learn from the 60+ state and local organizations in attendance

Best of all, each CGI Advantage client site receives one complimentary registration, making it easy to participate in this important event.

**Schedule for 2017:** The program will begin late Sunday afternoon and conclude at 6:00 pm on Tuesday. Please make travel arrangements accordingly.



Register by September 1 to receive the early bird registration rate.

# Users' Group Steering Committee

Members of the CGI Advantage Users' Group Steering Committee serve a very important role in representing the interests of the user community. They evaluate proposed enhancements for future releases, assist in the creation of session content for the Forum and act as a channel of communication between the Users' Group and CGI. The 2017 Steering Committee members are listed below for the area they represent. Each member's name is followed by the end date of their current 3-year term. If you have questions or comments, the Steering Committee members would love to hear from you!

## **Application Administration/Technical**



**Dharmesh Patel**State of Iowa (2018)
Email: dharmesh.patel@iowa.gov



Richard Mitchell
Wake County, NC (2019)
Email: rich.mitchell@wakegov.com

#### **Budget**



Angie Flick Maricopa County, AZ (2017) Email: flicka@mail.maricopa.gov



Ruth Schwartz
State of Michigan (2019)
Email: schwartzr1@michigan.gov

## **Business Intelligence**



Robin Morgan Southwest Florida Water Management District (2017) Email: robin.morgan@swfwmd.state.fl.us



**Ed Quedens**City of Mesa, AZ (2018)
Email: ed.quedens@mesaaz.gov

## **Financial Management**



Jackie Holland
Columbus Consolidated Gov't, GA (2017)
Email: jholland@columbusga.org



Jerry Gearheart State of Utah (2018) Email: jgearheart@utah.gov



Romeo Martinez Los Angeles County, CA (2019) Email: rmartinez@auditor.lacounty.gov

## **Human Resource Management**



Lynda Hanskat
City of Gainesville, FL (2017)
Email: hanskatlr@cityofgainesville.org



Kathleen Rudd Orndorff
Anne Arundel County Public Schools,
MD (2018)
Email: korndorff@aacps.org



**Leah Metzger**Baltimore County Public Schools, MD (2019)
Email: Imetzger@bcps.org

# Education

## Schedule-at-a-glance

Sunday, October 22	Start	End
Onsite Registration	1:00 pm	8:00 pm
Internet Cafe	1:00 pm	8:00 pm
Showcase	4:00 pm	6:00 pm
Showcase Reception	5:00 pm	6:00 pm
Welcome Reception	6:00 pm	8:00 pm
Monday, October 23	Start	End
Continental Breakfast	7:15 am	8:15 am
Onsite Registration	7:15 am	5:30 pm
Internet Cafe	7:15 am	5:30 pm
General Session	8:15 am	9:30 am
Showcase	9:30 am	12:00 pm
Breakout Sessions	9:45 am	10:45 am
Breakout Sessions	11:00 am	12:00 pm
Users' Group Luncheon	12:00 pm	1:30 pm
Breakout Sessions	1:30 pm	2:30 pm
Showcase	2:30 pm	5:30 pm
Breakout Sessions	2:45 pm	3:45 pm
General Session	4:00 pm	4:30 pm
Breakout Sessions	4:30 pm	5:30 pm
Special Event	7:00 pm	11:00 pm
Tuesday, October 24	Start	End
Continental Breakfast	7:15 am	8:15 am
Onsite Registration	7:15 am	6:00 pm
Internet Cafe	7:15 am	6:00 pm
General Session	8:15 am	9:30 am
Showcase	9:30 am	11:30 am
Breakout Sessions	9:30 am	10:30 am
Breakout Sessions	10:45 am	11:30 am
Peer-to-Peer Roundtable Luncheon	11:30 am	12:45 pm
Breakout Sessions	12:45 pm	1:45 pm
Showcase	1:45 pm	4:30 pm
Breakout Sessions	2:00 pm	3:00 pm
Breakout Sessions	3:15 pm	4:15 pm
Breakout Sessions	4:30 pm	5:30 pm
Closing General Session	5:30 pm	6:00 pm

## Education

#### Sessions by Field of Study

Sessions are offered in multiple fields of study—all targeted to your specific product and area of interest. Take multiple sessions from one field of study or pick and choose to customize the perfect schedule for you. Also available, numerous general interest sessions.

#### **Budget**

- 114 Setting Your Navigational Path:
  Product Direction—CGI Advantage
  Performance Budgeting
- 124 How Big Is Your Crew? A New Look at CGI Advantage Performance Budgeting's Salary Projection Functionality
- 134 See into the Future! A Closer Look at Projections and Allocations in Performance Budgeting
- 144 Building Your Island Paradise: An Exciting Look at Budgeting for Capital Projects with CGI Advantage Performance Budgeting
- 154 The Wizards of Performance Budgeting: Ask the Expert
- 214 Report from the Field: CGI Advantage Performance Budgeting
- 234 Cruising with Little Known Features in Performance Budgeting
- 244 Moving Your Treasure: Importing
  Data into Performance Budgeting—
  Thinking Outside the Box
- 255 Don't Get Tied Down! A Deeper Look at Budget Forms in Performance Budgeting
- 264 Sailing into the Sunset: After the Budget—A Look at the Processes to Close Out the Budget in Performance Budgeting

## **Business Intelligence**

- 115 Don't Walk the Plank: CGI infoAdvantage Lessons Learned
- 125 Cruise in Style: CGI infoAdvantage Product Direction
- 135 Find Hidden Treasures: Advanced Reporting Tips
- 145 Set Sail: Beginner to Proficient Reporting User
- 215 Get Up, Stand Up: CGI infoAdvantage Panel
- 235 Yo Ho! Performance Budgeting Universes

- 245 Scuba Dive to New Depths with CGI infoAdvantage Administration
- 256 Business Objects Upgrades in Paradise
- 265 Navigate the Caribbean with Financial Universes
- 266 Don't Lose Wilson: CGI infoAdvantage Data Assurance and Performance Tuning

#### **Financial**

- 111 Product Direction: CGI Advantage Financial Management
- 121 Vendor Intercepts: Safer Than Having Gringotts Send a Collections Goblin
- 131 Be a Wizard with Cost Accounting Funding Configuration
- 141 Electric Boogie: All the Fun of Electronic Invoicing and Payments — Part 1
- 153 Arithmancy 101: CGI Advantage Financial Management Core Concepts
- 211 CGI Advantage 1099 Reporting: Applying Wizarding Magic in the New Reporting Module
- 231 Pirates of the Caribbean: Debt Men Tell Tales
- 241 The Comprehensive Annual Financial Report/Financial Reporting Module for First-Year Students
- 251 Balancing the Books at Gringotts
- 252 Transfiguration 101: Increasing Productivity with Spreadsheet Upload
- 261 Bartering Between Pirate Crews

#### **General Interest**

- 117 CGI Advantage360: Overview and Future Direction
- 127 Training the Shipmates— Methodologies and Lessons Learned

- 137 Enhanced Maintenance at Your Service
- 138 CGI Advantage Case Management: The "Do-It-Yourself" Solution
- 147 Minor Release Upgrades —Methodology and Best Practices
- 148 CGI Advantage360 Technical and Operations Client Panel Discussion
- 151 State and Large Government User Group Meeting
- 152 Small and Mid-Sized Government and K-12 User Group Meeting
- 217 CGI Advantage Regulatory
  Management: Manage Your
  Licensing, Permitting and
  Compliance/Enforcement Activities
  with Ease
- 237 Maximizing CGI Advantage Support
- 247 Digital Transformation and CGI Advantage: How does Digital Transformation Correlate to CGI Advantage ERP with Steps to Get There.
- 248 Business Intelligence in CGI Advantage360
- 258 Leading Change: Using Influence and Persuasion Techniques to Improve CGI Advantage Usage
- 268 Minor Release Upgrades: Learn from Your Peers

#### **HR/Payroll**

- 113 Product Direction: CGI Advantage Human Resource Management
- 123 The Magic Behind Fair Labor Standards Act Pay Processing
- 133 Navigating the Marauders Map to 3.11
- 143 Tax Processing... It Has to Be Five O'Clock Somewhere
- 213 Don't Worry Be Happy Regulatory Compliance
- 233 Personnel Action Wizard Uses a Golden Snitch

## Education

- 243 The Goblet of Fire and Automated Pav
- 254 Winning at Self Service: The Firebolt Supreme
- 263 CGI Advantage Human Resource Management Archiving—Let It Go

#### **Obligation Recovery**

- 118 Centralized Obligation Recovery: What Your Agency Needs to Know to Maximize Your Collections Capabilities
- 128 Managed Services with CGI Advantage Obligation Recovery
- 139 Product Demonstration for CGI Advantage Obligation Recovery
- 149 CGI Advantage Obligation Recovery: Straight Talk—Peer to Peer Collaboration
- 218 CGI Advantage Obligation Recovery—Software Users Case Study
- 238 Contact Center Best Practices for Government Obligation Recovery
- 249 Self-Service and Compliance Portals
- 259 The Importance of an Onset Operational Assessment

#### **Partner Spotlight**

- 221 Fuel Digital Business Processes with OpenText Extended Enterprise Content Management for Advantage
- 222 Unified Talent Management in the Public Sector by Cornerstone OnDemand

#### **Procurement**

- 112 Three Little Birds: Product Direction: CGI Advantage Procurement
- 122 We're Jammin': Come Celebrate the Release of CGI Advantage Vendor Self Service 4.0
- 132 Going Once, Going Twice, Sold! CGI Advantage Vendor Self Service Case Study in Auctions
- 142 Lessons from Hogwarts: CGI Advantage Grantor Implementation Panel Discussion
- 212 Electric Boogie: All the Fun of Electronic Invoicing and Payments— Part 2
- 232 Secrets of the Sorting Hat: The Evaluation Process—How Many Ways Are There?
- Muggle Studies: Lessons Learned from the Rollout of OnlineSolicitations and Vendor Responses

- 253 Quidditch Teamwork: Cooperative Procurement Panel Discussion
- 262 Advice from Gringotts: CGI Advantage Inventory Management Panel Discussion

### Technology & Architecture

- 116 Yo Ho Ho!! Sail with the Innovators
- 126 Enter the Wizarding World of CGI Advantage Business Integrator
- 136 The Kraken: Unleash the Performance of Your CGI Advantage ERP
- 146 Unlock the "Chamber of Secrets" of CGI Advantage Security
- 155 Hogwarts Express: CGI Advantage Repository Xplorer
- 216 Flock with the Parrot Heads: CGI Advantage Batch Administration
- 236 Pirate Treasure Map: Make Hidden Data Work for You
- 246 CSI Florida: Troubleshooting Advantage
- 257 BIRTology: The Next Frontier
- 267 The Perfect Storm: Disaster Recovery and High Availability Preparedness



## **MONDAY, OCTOBER 23**

## 111 Product Direction: CGI Advantage Financial Management

Monday 9:45 am - 10:45 am

**Field of Study: Financial** 

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

How is CGI adapting to the latest trends in government and technology as they continue to evolve rapidly? Join this session for an overview of our current product roadmap of Financial Management. You'll learn about Release 3.11.2 and receive an update on Release 4.0, including a presentation of some of the most recent wireframes for pages and transactions.

Learning Objectives

After attending this session, you should be able to:

- Recall proposed enhancements included in Financial Management Release 3.11.2
- Describe the longer-term strategic direction of Financial Management
- Define some of the major UI/UX enhancements planned for Release 4.0

# 112 Three Little Birds: Product Direction: CGI Advantage Procurement

Monday 9:45 am - 10:45 am

**Field of Study: Procurement** 

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

Want to know what's coming next? Each release adds new capabilities and improves current product features to increase the value of your CGI Advantage solution. This session provides the future vision for CGI Advantage Procurement, Inventory, Vendor Self Service and grantor modules. You'll learn about key enhancements in Release 3.11.x and our plans for the future.

Learning Objectives

After attending this session, you should be able to:

- Define the key enhancements for CGI Advantage Procurement, Inventory, Vendor Self Service and grantor modules in Release 3.11.1 and Release 3.11.2
- Understand the timeline and key features in the CGI Advantage roadmap
- Discuss the CGI Advantage product vision for the Procurement, Inventory, Vendor Self Service and grantor modules

## 113 Product Direction: CGI Advantage Human Resource Management

Monday 9:45 am - 10:45 am

Field of Study: HR/Payroll

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

What's the latest product strategy for Human Resource Management? Find out how it aligns with trends in government, gain insights on how the product roadmap is related to these trends and learn about Release 3.11 and Release 4.0 changes.

Learning Objectives

After attending this session, you should be able to:

- · Discuss industry trends
- Discuss the direction for Human Resource Management
- Describe Release 3.11.2 enhancements
- Provide feedback on Release 4.0 usability

# 114 Setting Your Navigational Path: Product Direction—CGI Advantage Performance Budgeting

Monday 9:45 am - 10:45 am

Field of Study: Budget

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

With the budgetary landscape continuing to evolve with new trends, requirements and regulatory demands, how does Performance Budgeting help you stay ahead of the curve? Gain insights into what's new in the client community, and learn about the exciting functionality planned to see where the product is heading in the future! In this session, we'll highlight functionality in the latest 3.11 Solution Packs as well as provide a sneak peek as to what's coming in Release 4.0.

Learning Objectives

After attending this session, you should be able to:

• Define the strategic direction and key upcoming enhancements for Performance Budgeting

## 115 Don't Walk the Plank: CGI infoAdvantage Lessons Learned

Monday 9:45 am - 10:45 am

Field of Study: Business Intelligence

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

Avoid pitfalls by tapping into best practices for implementing infoAdvantage! Learn from the infoAdvantage user community and CGI about their experiences with implementing infoAdvantage and upgrading their solution. This session will focus on key lessons learned in the implementation of infoAdvantage, challenges faced and solutions proposed.

Learning Objectives

After attending this session, you should be able to:

- Discuss lessons learned when implementing infoAdvantage for the first time
- Discuss lessons learned when upgrading infoAdvantage

## 116 Yo Ho Ho!! Sail with the Innovators

Monday 9:45 am - 10:45 am

Field of Study: Technology & Architecture

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

Discover the innovation of CGI Advantage! State and local governments require a powerful combination of standard, scalable technology and comprehensive, integrated, built-for-government ERP software. This session defines the underlying technologies that CGI Advantage is built upon, as well as current technology trends, and looks ahead at future enhancements under consideration.

Learning Objectives

- Discuss the direction for CGI Advantage technology
- Plan for CGI Advantage upgrades, software license changes and employee training
- Define how to strategically align other planned IT projects

## **MONDAY, OCTOBER 23**

## 117 CGI Advantage360: Overview and Future Direction

Monday 9:45 am - 10:45 am

**Field of Study: General Interest** 

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

New CGI Advantage clients and long-time legacy clients are realizing the benefits of moving to a standardized, Software-as-a-Service (SaaS) approach to ERP with Advantage360. This session will highlight the current Advantage360 product offering, including discussions on key enhancements and improvements released to the SaaS deployment of CGI Advantage over the past year, what new functionality will be available for sites to implement as part of the 3.11.1 upgrade, and how CGI Advantage 4.0 fits into the Advantage360 product roadmap.

Learning Objectives

After attending this session, you should be able to:

- Describe the Advantage360 SaaS deployment option of CGI Advantage
- Describe the functionality and features included in recent release updates
- Recall the roadmap for key Advantage360 upgrades, including 3.11.1 and 4.0

## 118 Centralized Obligation Recovery: What Your Agency Needs to Know to Maximize Your Collections Capabilities

Monday 9:45 am - 10:45 am

Field of Study: Obligation Recovery, General Interest

Type/Level: Overview

CPE Subject Area: Finance Duration in hours: 1.0 hour Onsite credits: 1.0 credit

More than one agency in your state, county or city is in the process of collecting monies that are owed to them. One of the biggest setbacks for government agencies is trying to work alone to collect a variety of debt types. This session covers the benefits of CGI Advantage Obligation Recovery. Centralizing debt collection from multiple agencies and debt types produces significant economies of scale to support an investment in powerful collection tools. Learn how Obligation Recovery automates manual processes, while gathering data from multiple sources to compile a comprehensive profile of your debtor and

deliver new collection strategies that allow more revenues to be collected.

Learning Objectives

After attending this session, you should be able to:

- Streamline department operations from manual to automated actions, saving time and money
- Build a comprehensive debtor profile by pulling from multiple file sources

#### 121 Vendor Intercepts: Safer Than Having Gringotts Send a Collections Goblin

Monday 11:00 am - 12:00 pm

Field of Study: Financial

Type/Level: Intermediate

CPE Subject Area: Finance Duration in hours: 1.0 hour Onsite credits: 1.0 credit

How can you improve collections? Attend this session to hear about the many ways that state and local governments can recoup debts using vendor intercepts. Options for both internal and external debts will be addressed, including some of the enhancements that have been introduced in recent releases such as changes made to accommodate liens, levies and garnishments.

Learning Objectives

After attending this session, you should be able to:

- Describe intercepts functionality, including both internal and external Intercepts
- Understand how clients have implemented intercepts
- Understand the benefits of intercepts

## 122 We're Jammin': Come Celebrate the Release of CGI Advantage Vendor Self Service 4.0

Monday 11:00 am - 12:00 pm

**Field of Study: Procurement** 

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

Come and join the community in taking a journey through Vendor Self Service 4.0. Share in the vision of a completely revamped user interface and user experience as a self-service user. Experience the innovation, hear about future plans and provide inputs into the new CGI Advantage ecosystem!

Learning Objectives

After attending this session, you should be able to:

- Understand the Vendor Self Service 4.0 user experience redesigns
- Define the key elements of Release 4.0
- Understand the CGI Advantage future vision for Release 4.0 and CGI Advantage Procurement

## 123 The Magic Behind Fair Labor Standards Act Pay Processing

Monday 11:00 am - 12:00 pm

Field of Study: HR/Payroll

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Are you a wizard with Fair Labor Standards Act (FLSA) pay processing? Do you want to learn the magic behind FLSA and client compensation hours calculations? Come learn from our panel discussion, where users will provide examples of their experiences with FLSA and client compensation hours processing.

Learning Objectives

- Recall key configurations for FLSA and client compensation overtime
- Describe how to calculate overtime for employees having multiple rates of pay and multiple appointments

## **MONDAY, OCTOBER 23**

## 124 How Big Is Your Crew? A New Look at CGI Advantage Performance Budgeting's Salary Projection Functionality

Monday 11:00 am - 12:00 pm

Field of Study: Budget

Type/Level: Advanced

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Are you ready to learn how to maximize your salary projections? In this session, you'll gain deeper insights into Performance Budgeting's salary projection functionality and learn how it can be used to ensure that costs and adjustments are effectively tracked. We'll highlight key salary projection scenario features and share how you can use them to help forecast position costs. You'll also learn about the new fiscal year and function type fields added in Release 3.11 and see examples of how they can be used to track position and employee changes.

Learning Objectives

After attending this session, you should be able to:

- Identify the configurations needed to support the salary projection functionality
- Identify the options to track position and employee record data

## 125 Cruise in Style: CGI infoAdvantage Product Direction

Monday 11:00 am - 12:00 pm

Field of Study: Business Intelligence

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

Want to know what's coming next for your infoAdvantage solution? Each release adds new capabilities and improves current product features to increase the value of infoAdvantage. This session provides the future vision for the solution, including exciting new features available in Release 3.11.2, and takes a look at how business intelligence helps transform the way users will interact with the solution in Release 4.0.

Learning Objectives

After attending this session, you should be able to:

- Describe the key enhancements for business intelligence in Release 3.11.2
- Discuss the product strategy and direction for the business intelligence solution component

## 126 Enter the Wizarding World of CGI Advantage Business Integrator

Monday 11:00 am - 12:00 pm

Field of Study: Technology & Architecture

Type/Level: Advanced

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Advantage Business Integrator is the robust, unified integration framework for CGI Advantage ERP. Attend this session to understand how to configure, execute and manage your file-based and Web service integration via Business Integrator.

Learning Objectives

After attending this session, you should be able to:

- Explain the Business Integrator architecture
- Understand Business Integrator concepts like services, events and configuration
- Set up, monitor and troubleshoot interfaces via the Business Integrator Portal

#### 127 Training the Shipmates – Methodologies and Lessons Learned

Monday 11:00 am - 12:00 pm

**Field of Study: General Interest** 

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

How do you keep your ship (site) sailing smoothly? With a solid training program! Attend this session to learn about training methodologies and building a successful training program. Our panel discussion will feature multiple clients, providing you with valuable insights on delivery methods, training materials and best practices.

Learning Objectives

After attending this session, you should be able to:

- Use provided information toward developing an effective training plan
- Discuss approaches for identifying training needs
- Determine the best training delivery method for your audience
- Track training results

## 128 Managed Services with CGI Advantage Obligation Recovery

Monday 11:00 am - 12:00 pm

**Field of Study: Obligation Recovery** 

Type/Level: Overview

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Is your agency struggling with shortages of qualified staff, inconsistent budget allocations and pressures to improve service delivery? There is a growing appreciation for using cloud technology and a managed services approach for your obligation recovery solution to provide greater predictability, improve access to talent and next-generation capabilities, and reduce total cost of ownership. You'll learn about our approach to managed services for CGI Advantage Obligation Recovery.

Learning Objectives

After attending this session, you should be able to:

- Explain what managed services are
- Describe the benefits and challenges of managed services
- Describe the approach to move from an on premise installation to a cloud-based managed solution

## **MONDAY, OCTOBER 23**

## 131 Be a Wizard with Cost Accounting Funding Configuration

Monday 1:30 pm - 2:30 pm

**Field of Study: Financial** 

Type/Level: Intermediate

CPE Subject Area: Accounting Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Are you in the know with cost accounting best practices? If you're considering implementing cost accounting for the first time or have already implemented some of the core capabilitities, you may be wondering how the solution can be best leveraged for management and control of your grant and project expenditures and reimbursements. For examaple, you may want to know how a single grant can be shared across multiple program codes and still be budgeted at the appropriate level, or how a single year's apportionment is spent and managed across fiscal years. Attend this session to hear how the various components of the chart of accounts, such as funding profiles and program periods, connect for this purpose.

Learning Objectives

After attending this session, you should be able to:

- Establish cost accounting structures to reflect single or multiple funding sources across multiple years
- Configure the funding profile inference tables to direct eligible reimbursable expenses to the correct funding source(s)
- Configure the program-related budgets to control spending and reimbursements

# 132 Going Once, Going Twice, Sold! CGI Advantage Vendor Self Service Case Study in Auctions

Monday 1:30 pm - 2:30 pm

**Field of Study: Procurement** 

Type/Level: Overview

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Come hear about the implementation and functionality of one of the lesser-known features of Vendor Self Service—surplus auctions. We'll tap into a detailed case study from a site that's been using the auctions feature for years. Learn when and how they decided to use this feature, what their results have been, and what additional features they'd like to see in 4.0.

Learning Objectives

After attending this session, you should be able to:

- Describe the key Vendor Self Service auction features
- Describe the implementation considerations for auctions in Vendor Self Service
- Describe the approach and usage of the functionality by the client site

## 133 Navigating the Marauders Map to 3.11

Monday 1:30 pm - 2:30 pm

Field of Study: HR/Payroll

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

Hear your peers discuss their real-life experiences upgrading to CGI Advantage Human Resource Management Release 3.11. Our panelists will share lessons learned from their upgrade to 3.11 and talk about change management and rolling out new features in the latest release. You'll have the opportunity to explore available options for developing a successful strategy for your upgrade.

Learning Objectives

After attending this session, you should be able to:

- Identify the key components of Human Resource Management implementation, conversion and upgrade models
- List the new features in Release 3.11
- Develop upgrade change management plans and strategies for a successful upgrade

## 134 See into the Future! A Closer Look at Projections and Allocations in Performance Budgeting

Monday 1:30 pm - 2:30 pm

Field of Study: Budget

Type/Level: Intermediate

CPE Subject Area: Finance Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Curious how you can leverage projections and allocations more effectively to meet the needs of your budget process? Join us for a discussion on CGI Advantage Performance Budgeting's projection and allocation features, and hear creative ways clients have infused these features when building their budget. Also gain insights from examples of how

projections and allocations can be used to predict future year spending.

Learning Objectives

After attending this session, you should be able to:

- Apply best practices for when to use projections and allocations in the various business processes
- Describe configuration options available for projections
- Describe configuration options available for allocations

## 135 Find Hidden Treasures: Advanced Reporting Tips

Monday 1:30 pm - 2:30 pm

Field of Study: Business Intelligence

Type/Level: Advanced

CPE Subject Area: Specialized Knowledge Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Prerequisite: Developer understanding of infoAdvantage for Webi Intelligence

Discover new riches and features with CGI infoAdvantage. Advanced topics will include (but are not limited to) free-hand SQL reports, how to create and use Explorer Views, and creative ways to use input controls and graphs. This session is for report developers and users interested in getting the most out of the infoAdvantage toolset.

Learning Objectives

After attending this session, you should be able to:

- Provide more value to your existing documents and have ideas for future designs
- Create and deploy a free-hand SQL report
- Discuss the new reporting features available with infoAdvantage

## **MONDAY, OCTOBER 23**

# 136 The Kraken: Unleash the Performance of Your CGI Advantage FRP

Monday 1:30 pm - 2:30 pm

Field of Study: Technology & Architecture

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Congratulations! CGI Advantage is live. What do you do now to keep the system running smoothly and operating at peak performance? This session will cover operational and performance monitoring/tuning best practices. CGI and your peers will describe their recommendations and experiences and take your questions.

Learning Objectives

After attending this session, you should be able to:

- Describe many of the performance best practices recommended by CGI and your peers for CGI Advantage Financial, Human Resource Management and Performance Budgeting
- Identify where you may find performance improvements at your own site
- Recall performance monitoring and tuning tips to improve your site's batch cycles and online performance

## 137 Enhanced Maintenance at Your Service

Monday 1:30 pm - 2:30 pm

**Field of Study: General Interest** 

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

Is your organization looking for ways to simplify the maintenance of your CGI Advantage applications? This session will discuss the additional benefits that Enhanced Maintenance Services have to offer over a standard maintenance plan. Our Customer Support Group will kick things off with a brief overview of Enhanced Maintenance Services followed by a discussion with current customers, which you won't want to miss. Join us to find out what made these clients choose Enhanced Maintenance Services and how their organizations have benefitted from these enhanced services!

Learning Objectives

After attending this session, you should be able to:

• Describe the Enhanced Maintenance Services offering

- Understand why customers chose the Enhanced Maintenance Services model
- List how organizations have benefitted from these services

#### 138 CGI Advantage Case Management: The "Do-It-Yourself" Solution

Monday 1:30 pm - 2:30 pm

**Field of Study: General Interest** 

Type/Level: Overview

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Everyone knows that Case Management is a highly configurable solution, and you've seen what it can do. But how can you and your team rapidly configure and deploy solutions that bring value to your organization? Join Patrick Hart of CGI and Robin Morgan of the South West Florida Water Management District for an interactive session, and see just how fast and intuitive it is to deliver projects on the Case Management platform.

Learning Objectives

After attending this session, you should be able to:

- Outline key steps in defining a solution built on Case Management
- Acknowledge that business skills, and not computer science skills, are required
- Identify two or more real-life problems in your organization that can be addressed with Case Management

## 139 Product Demonstration for CGI Advantage Obligation Recovery

Monday 1:30 pm - 2:30 pm

**Field of Study: Obligation Recovery** 

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

Do you want to see the CGI Advantage Obligation Recovery software in action? Here is your chance to see the new release features and functionality. This session will be an interactive product demonstration of the Advantage Obligation Recovery software.

# 141 Electric Boogie: All the Fun of Electronic Invoicing and Payments—Part 1

Monday 2:45 pm - 3:45 pm

Field of Study: Financial, Procurement

Type/Level: Intermediate

CPE Subject Area: Finance Duration in hours: 1.0 hour Onsite credits: 1.0 credit

While CGI Advantage does not yet support the more sophisticated wizarding currency that is knuts, sickles and galleons, significant strides have been made in the area of electronic payments. CGI Advantage now offers end-to-end Electronic Data Interchange (EDI) capabilities. Industry-standard EDI 810 invoicing is fully supported on the front-end of the payment cycle, and EDI 820 is supported for Electronic Funds Transfer (EFT). This session will explore EDI capabilities in CGI Advantage and also address EFT and ePayables options that have been implemented by many sites.

Learning Objectives

After attending this session, you should be able to:

- List all electronic invoicing and payment options
- Describe the benefits of implementing electronic payment solutions
- Explain which options are most applicable for your site.

## 142 Lessons from Hogwarts: CGI Advantage Grantor Implementation Panel Discussion

Monday 2:45 pm - 3:45 pm

**Field of Study: Procurement** 

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Calling all members to join our panel discussion on the latest in the CGI Advantage grantor community. Come see the latest release offering, hear from clients who are in the process of or have implemented, and explore key functions that can take CGI Advantage grantor to further heights. You'll gain insights on new features, process improvements, as well as process and user needs that should be incorporated to make this the solution of choice!

Learning Objectives

After attending this session, you should be able to:

- Define key Release 3.11 grantor enhancements
- Describe the approach and usage adopted by client sites
- Identify the key takeaways from the discussion

## **MONDAY, OCTOBER 23**

## 143 Tax Processing... It Has to Be Five O'Clock Somewhere

Monday 2:45 pm - 3:45 pm

Field of Study: HR/Payroll

Type/Level: Intermediate

CPE Subject Area: Personnel/HR Duration in hours: 1.0 hour Onsite credits: 1.0 credit

The new CGI Advantage Human Resource Management Release 3.11 introduced new state tax reciprocity enhancements. This session will show new state and local tax features and configurations. Join us to learn how you can set up and implement the new features when upgrading to 3.11, and find out how it simplifies your annual W2 process.

Learning Objectives

After attending this session, you should be able to:

- Describe how Release 3.11 state and local tax configurations work
- Explain changes needed for the W2 tax process during the 3.11 upgrade
- Describe the CGI Advantage W2 process

## 144 Building Your Island Paradise: An Exciting Look at Budgeting for Capital Projects with CGI Advantage Performance Budgeting

Monday 2:45 pm - 3:45 pm

Field of Study: Budget, Financial

Type/Level: Intermediate

CPE Subject Area: Finance Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Capital budgeting and planning is an integral part of the strategic planning process. Come explore the capabilities of Performance Budgeting, which can help you track and plan for capital projects, and learn how the out-of-the-box models can help in allocating costs. You can also explore how these projects can feed into CGI Advantage Financial's Cost Accounting module and how actuals can be sent back to Performance Budgeting to help in the planning process.

Learning Objectives

After attending this session, you should be able to:

- Describe system configuration options for capital projects
- Describe configuration options available for transferring data to and from Performance Budgeting

## 145 Set Sail: Beginner to Proficient Reporting User

Monday 2:45 pm - 3:45 pm

Field of Study: Business Intelligence

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Are you just getting your feet wet with CGI infoAdvantage and want to move beyond the basic report and query skills you use today? Attend this session to learn how to incorporate input controls, apply conditional formatting and use scheduling and publications functionality..

Learning Objectives

After attending this session, you should be able to:

- Complete report formatting techniques
- Understand how to set up distribution and publication features
- Identify strategies for showing data in graphical formats

## 146 Unlock the "Chamber of Secrets" of CGI Advantage Security

Monday 2:45 pm - 3:45 pm

Field of Study: Technology & Architecture

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Grab your wands and join us on a journey through live demos and a moderator-led discussion to discover how to unlock the "Chamber of Secrets" of Advantage Security. You'll walk away with greater expertise on how to leverage our security capabilities to meet your business requirements.

Learning Objectives

After attending this session, you should be able to:

- Describe how to leverage data field security
- Describe how to enforce separation of duties
- Describe the benefits of the "Bypass MRT (Memory Resident Table) Lookups" enhancement
- Describe how other wizards of security leverage the robust application security capabilities within CGI Advantage

## 147 Minor Release Upgrades-Methodology and Best Practices

Monday 2:45 pm - 3:45 pm

**Field of Study: General Interest** 

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Find out why it's critiical to stay current with available releases to maintain your organization's access to CGI maintenance services, and to take advantage of new features and functionality to support your business needs. This session focuses on the recommended upgrade methodology and best practices associated with developing your business case, as well as planning and executing a streamlined, successful upgrade process. Learn about our standard CGI Accelerate upgrade approach and additional support services such as hardware planning, forms and report migration, and interface upgrades. If you're thinking about or currently planning an upgrade for your current CGI Advantage 3.x release, you don't want to miss this session.

Learning Objectives

After attending this session, you should be able to:

- Define the business case and requirements for upgrading releases
- Describe CGI's recommended upgrade methodology and best practices
- Identify areas where additional CGI support would be beneficial
- List key success factors for a successful upgrade

## **MONDAY, OCTOBER 23**

# 148 CGI Advantage360 Technical and Operations Client Panel Discussion

Monday 2:45 pm - 3:45 pm

Field of Study: General Interest

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge Duration in hours: 1.0 hour

Onsite credits: 1.0 credit

Get insider tips on Advantage360! Because Advantage360 is deployed in a multi-tenant cloud-hosted environment, the technical and operations activities differ when compared to on-premise or CGI Managed Advantage. Join us for a panel discussion with representatives from current Advantage360 sites as they discuss how they handle security and workflow, forms, interfaces, batch processing and steady-state operations under the Advantage360 SaaS deployment model

Learning Objectives

After attending this session, you should be able to:

 Describe lessons learned, tips and best practices to approach the technical and steady-state operational side of Advantage360

## 149 CGI Advantage Obligation Recovery: Straight Talk-Peer to Peer Collaboration

Monday 2:45 pm - 3:45 pm

**Field of Study: Obligation Recovery** 

CPE Subject Area: Not CPE Eligibl Duration in hours: 1.0 hour

Do you have feedback to share with the CGI Advantage Obligation Recovery team? This session will be a roundtable discussion, open to all Obligation Recovery users, to share valuable feedback. We are looking to hear about your business collections challenges and use this session to collaborate together.

## 151 State and Large Government User Group Meeting

Monday 4:30 pm - 5:30 pm

**Field of Study: General Interest** 

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

Gain key insights with this client-led state and large government user group meeting as we discuss topics

submitted by you. This interactive meeting provides the opportunity to ask questions and discuss relevant trends and topics with your fellow peers. A survey will be sent out in September to collect topics and questions up for discussion.

## 152 Small and Mid-Sized Government and K-12 User Group Meeting

Monday 4:30 pm - 5:30 pm

**Field of Study: General Interest** 

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

Gain key insights with this client-led small and midsized government and K-12 user group meeting as we discuss topics submitted by you. This interactive meeting provides the opportunity to ask questions and discuss relevant trends and topics with your fellow peers. A survey will be sent out in September to collect topics and questions up for discussion.

## 153 Arithmancy 101: CGI Advantage Financial Management Core Concepts

Monday 4:30 pm - 5:30 pm

**Field of Study: Financial** 

Type/Level: Basic

CPE Subject Area: Finance Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Just as arithmancy is one of the introductory classes for aspiring wizards at Hogwarts, we've got one for you. Whether new to Financial Management or simply looking for a refresher class, this session will provide an overview of the key concepts and functions. Users often become so immersed in the details of some of the functional areas that key features and functions may be forgotten. One session cannot encompass the entire breadth of the solution, but by attending this session, you'll be reminded of some of the core concepts and also pick up a few tips and tricks along the way.

Learning Objectives

After attending this session, you should be able to:

- Recall key shortcuts, features and functions
- Understand the distribution of accounting to multiple lines
- Understand options for future document triggering
- Describe worklist details

## 154 The Wizards of Performance Budgeting: Ask the Expert

Monday 4:30 pm - 5:30 pm

Field of Study: Budget

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

Have a burning question you want answered? Want an opportunity to quiz our experts? Increase your knowledge by joining us for this open-ended interactive session where you will have an opportunity to ask our experts how you can more effectively leverage CGI Advantage Performance Budgeting.

Learning Objectives

After attending this session, you should be able to:

- Describe best practices from peers and CGI
- Explain solutions to questions asked during the session
- Network with peers and experts

## 155 Hogwarts Express: CGI Advantage Repository Xplorer

Monday 4:30 pm - 5:30 pm

Field of Study: Technology & Architecture

Type/Level: Basic

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Explore the power of data connectivity! The Repository Xplorer connects CGI Advantage pages to database tables, providing invaluable information for tracing through the CGI Advantage metadata. Join our session to learn how to use the tool and how to update the metadata for your custom modifications.

Learning Objectives

After attending this session, you should be able to:

- Know what Repository Xplorer is and how to use it effectively
- Learn how to update the Repository Xplorer to include your custom modifications
- Learn about other valuable tools available to support your site

## **TUESDAY, OCTOBER 24**

## 211 CGI Advantage 1099 Reporting: Applying Wizarding Magic in the New Reporting Module

Tuesday 9:30 am - 10:30 am

**Field of Study: Financial** 

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

1099 reporting just got easier! CGI continues to bring more core functionality into the base solution, eliminating the need for third-party integration. The 1099 reporting module is the latest such innovation that will allow you to perform end-to-end 1099 reporting from CGI Advantage Financial Management. Attend this session for an overview of the new module, which will allow you to print 1099 forms and transmit files to the IRS directly from CGI Advantage.

Learning Objectives

After attending this session, you should be able to:

- Introduce the new 1099 reporting module in Financial Management
- Learn about the rollout plans for tax year 2017, 2018 and beyond
- Understand the future support model for existing solutions supported by CGI

## 212 Electric Boogie: All the Fun of Electronic Invoicing and Payments– Part 2

Tuesday 9:30 am - 10:30 am

**Field of Study: Procurement** 

Type/Level: Intermediate

CPE Subject Area: Finance Duration in hours: 1.0 hour Onsite credits: 1.0 credit

You'll be doing the Electric Slide in no time, after you hear the many ways you can utilize the electronic invoicing features of CGI Advantage Procurement. Want to allow an interface for vendors to submit their own invoices? Covered. Want to allow vendors to transfer invoice files via an electronic interchange? Covered. Join the community in exploring the CGI Advantage invoicing features.

Learning Objectives

After attending this session, you should be able to:

• Define the key Vendor Self Service invoicing features

- Define the key Electronic Data Interchange features
- Describe the matching process
- Identify key takeaways from the client case study

## 213 Don't Worry Be Happy Regulatory Compliance

Tuesday 9:30 am - 10:30 am

Field of Study: HR/Payroll

Type/Level: Basic

CPE Subject Area: Personnel/HR Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Does regulatory compliance have you worried? Learn how to overcome challenges and drive successful implementation strategies for regulatory software updates. This session is a discussion on regulatory impacts on CGI Advantage Human Resource Management. It will guide you through the world of staying informed on what and when regulatory changes need software updates.

Learning Objectives

After attending this session, you should be able to:

- Explain the CGI process of reviewing regulatory changes
- Describe the communication paths and strategies for regulatory-related software changes
- Identify tips and tricks for smooth implementation of regulatory changes

## 214 Report from the Field: CGI Advantage Performance Budgeting

Tuesday 9:30 am - 10:30 am

Field of Study: Budget

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

Ready to get the exclusive scoop on the latest news from the Performance Budgeting community? Join us for a panel discussion, where we'll share information on recent go-lives and upgrades. During the panel, you'll hear from clients who are in the process of upgrading and implementing the latest release, get their feedback on the process and hear lessons learned and what to expect.

Learning Objectives

After attending this session, you should be able to:

- Describe best practices for upgrading
- Identify the configurations needed to support new 3.11 features

## 215 Get Up, Stand Up: CGI infoAdvantage Panel

Tuesday 9:30 am - 10:30 am

Field of Study: Business Intelligence

Type/Level: Basic

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Want to discuss your reporting insights and lessons learned with the infoAdvantage user community? During this interactive session, you'll be invited to ask questions of the panelists who will share their insights and discuss lessons learned based on their collective experience. To learn how to maximize your infoAdvantage solution, don't miss this session!

Learning Objectives

After attending this session, you should be able to:

- Describe how other sites leverage infoAdvantage
- $\bullet$  List tips and tricks for getting the most out of infoAdvantage

## 216 Flock with the Parrot Heads: CGI Advantage Batch Administration

Tuesday 9:30 am - 10:30 am

Field of Study: Technology & Architecture

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Ready to take a closer look at the benefits of Batch Administration? Join us for a technical dive into how Batch Administration works by looking at both the online batch framework and the offline job interaction client tool for CGI Advantage.

Learning Objectives

- Examine the batch administration pages in CGI Advantage Administration to set up batch processes, run batch processes, and control and monitor jobs
- Configure and execute a job using the CGI Advantage job interaction client

## **TUESDAY, OCTOBER 24**

## 217 CGI Advantage Regulatory Management: Manage Your Licensing, Permitting and Compliance/Enforcement Activities with Ease

Tuesday 9:30 am - 10:30 am

Field of Study: General Interest

Type/Level: Overview

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

State and local governments are required to process mountains of permit and license information in order to manage regulatory requirements for businesses and citizens. Attend this session to learn how Regulatory Management can help your government create a centralized, enterprise-wide source of accurate regulatory and permitting information for improved efficiency and enforcement, enabling outcome-driven planning and decision making.

Learning Objectives

After attending this session, you should be able to:

- Describe at a high level the CGI Advantage Permitting solution
- Identify practical applications of Permitting within your government agency
- List the benefits of implementing Permitting
- Share Permitting contact information within your agency

## 218 CGI Advantage Obligation Recovery–Software Users Case Study

Tuesday 9:30 am - 10:30 am

**Field of Study: Obligation Recovery** 

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

Attend this session to learn from your peers on best practices and lessons learned from a CGI Advantage Obligation Recovery360 project. This session will be from an Advantage Obligation Recovery software user.

# 221 Fuel Digital Business Processes with OpenText Extended Enterprise Content Management for Advantage

Tuesday 10:45 am - 11:30 am

**Field of Study: Partner Spotlight** 

CPE Subject Area: Not CPE Eligible Duration in hours: 45 minutes

By integrating Enterprise Content Management (ECM) into Advantage where work actually takes place, OpenText™ Content Suite 16 connects disparate business processes and information sources—sharing content across the enterprise to improve insight, efficiency and throughput. According to the Association for Information and Image Management (AIIM), 61 percent of workers operate in environments where there is zero connection between their ECM platform and their other business systems. Massive volumes of digital information from varying resources often mean logging into multiple applications to obtain the right content for important business decisions—and enterprises struggle to digitize, integrate and simplify these business processes.

## 222 Unified Talent Management in the Public Sector by Cornerstone OnDemand

Tuesday 10:45 am - 11:30 am

Field of Study: Partner Spotlight

CPE Subject Area: Not CPE Eligible Duration in hours: 45 minutes

With the growing exit of senior leadership and talent loss to private sector, public sector must implement strategies that re-define the way employees are recruited, trained and re-allocated for workforce optimization. These real challenges often require changes to workplace culture and has increased efforts and emphasis on "Just In Time" development and providing more transparent career pathways for retention and engagement. Advancing a mixed, millennial labor pool and leveraging innovation requires organizations to make smarter use of their talent, maintain compliance across a distributed workforce, provide development opportunities and successfully complete workforce planning to identify and retain next generation leadership. Please join Cornerstone OnDemand to learn more about how you can leverage innovative technology to become strategic HR leaders and empower your workforce for success!

## 231 Pirates of the Caribbean: Debt Men Tell Tales

Tuesday 12:45 pm - 1:45 pm

**Field of Study: Financial** 

Type/Level: Basic

CPE Subject Area: Finance Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Since debt management was introduced in Release 3.10 as part of the cash management module, many sites have upgraded to that release and beyond, and have begun implementation of the relatively new functionality. In 2016, you heard from sites in their various stages of implementation. This year's session will continue that journey with stories from clients who are both live and still in the process of implementation. Attend this session to tap into the lessons learned to help you evaluate and implement debt management.

Learning Objectives

After attending this session, you should be able to:

- Discuss the benefits of debt management
- Recount clients' lessons learned from implementing debt management

## 232 Secrets of the Sorting Hat: The Evaluation Process—How Many Ways Are There?

Tuesday 12:45 pm - 1:45 pm

**Field of Study: Procurement** 

Type/Level: Intermediate

CPE Subject Area: Finance Duration in hours: 1.0 hour Onsite credits: 1.0 credit

How many ways are there to evaluate solicitation responses? Can we standardize the evaluation process? Are sites performing evaluations outside of the system? Are they doing anything "special" to meet the business requirements of their site? We'll hear about different client strategies and explore innovative uses of the CGI Advantage Procurement evaluation functionality.

Learning Objectives

- Define the key evaluation features
- Describe client sites' evaluation processes
- Identify key takeaways from the discussion

## **TUESDAY, OCTOBER 24**

## 233 Personnel Action Wizard Uses a Golden Snitch

Tuesday 12:45 pm - 1:45 pm

Field of Study: HR/Payroll

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Ready to learn how the Personnel Action Wizard provides CGI Advantage Human Resource Management users with the ability to streamline a variety of employee profile updates? The wizard can automatically trigger the execution of deduction, benefit, leave and payroll functions when processing designated personnel actions. This session will focus on business rule configuration and the demonstration of standard scenarios that the wizard was specifically designed to support. If your site has been discussing how to change business processes to accommodate the decentralization of personnel actions, or how to streamline the downstream business functions that should also be processed along with a personnel action, then this session is for you!

#### Learning Objectives

After attending this session, you should be able to:

- Describe how the Personnel Action Wizard works and the business processes it is intended to support
- List the configuration required to implement the wizard
- Identify ways to streamline business processes using the wizard

## 234 Cruising with Little Known Features in Performance Budgeting

Tuesday 12:45 pm - 1:45 pm

Field of Study: Budget

Type/Level: Basic

CPE Subject Area: Finance Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Are you getting the most out of your CGI Advantage Performance Budgeting system? In this session, we'll explore some of the lesser-known features that can help maximize your time and improve efficiencies throughout the budget process. Hear from clients and CGI members on features that help them get the most out of Performance Budgeting!

Learning Objectives

After attending this session, you should be able to:

- Understand how to use the lesser-known features of Performance Budgeting
- Describe best practices for navigation and system configuration

## 235 Yo Ho! Performance Budgeting Universes

Tuesday 12:45 pm - 1:45 pm

Field of Study: Business Intelligence, Budget

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Join the pirate crew and learn how to maximize return on investment in CGI infoAdvantage for your CGI Advantage Performance Budgeting users. This session will highlight the Performance Budgeting universes and showcase how infoAdvantage reports and dashboards can be used to meet budget reporting and information requirements. You'll learn from examples of reporting on salary and benefit forecasting and baseline dashboards, and see what is being used by production sites.

Learning Objectives

After attending this session, you should be able to:

- Describe the salary and benefit forecasting universe
- Explain the functionality of the Performance Budgeting dashboards
- Increase your knowledge of how users implement Perfromance Budgeting universes and reports

## 236 Pirate Treasure Map: Make Hidden Data Work for You

Tuesday 12:45 pm - 1:45 pm

Field of Study: Technology & Architecture

Type/Level: Advanced

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Ready to make the most of your data? The tables that manage security and workflow hold a wealth of information that can be mined to help you run your enterprise better. This session will examine some of the data sources in CGI Advantage and provide tactical and strategic reporting ideas in the areas of internal controls, efficiency, manager metrics and user training.

Learning Objectives

After attending this session, you should be able to:

• Describe how to use operational and log tables in the financial and administration applications to facilitate continuous process improvements and create detective controls using system data

## 237 Maximizing CGI Advantage Support

Tuesday 12:45 pm - 1:45 pm

Field of Study: General Interest

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

Ready to tap into valuable resources and best practices? Join this session as the Customer Support Group navigates through the different tools CGI Advantage support has to offer. We'll take a tour through the CGI Solutions Support Center, CGI Download Center and the CGI Resource Library to showcase the different features that can benefit you. A panel of your peers will provide input along the way, sharing how their site has utilized these tools for efficient issue resolution and effective communication with support staff and the CGI Advantage community.

Learning Objectives

- Discuss the standard maintenance support process and the Customer Support Group
- Identify ways to improve support efficiencies through effective communication and tools

## **TUESDAY, OCTOBER 24**

## 238 Contact Center Best Practices for Government Obligation Recovery

Tuesday 12:45 pm - 1:45 pm

**Field of Study: Obligation Recovery** 

Type/Level: Basic

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

There are many techniques that can be employed in your contact center to collect debts efficiently and with limited intrusion to the debtor. Learn how to not only communicate directly with your clients but also how to structure your contact center to maximize its efficiency and how CGI can assist in this effort. During this session, we will openly discuss contact center best practices specifically for government debt.

#### Learning Objectives

After attending this session, you should be able to:

- · Identify contact center best practices
- Identify new contact center techniques that are being used by government obligation recovery agencies
- Describe the benefits of having a high functioning contact center

# 241 The Comprehensive Annual Financial Report/Financial Reporting Module for First-Year Students

Tuesday 2:00 pm - 3:00 pm

Field of Study: Financial, Business Intelligence

Type/Level: Basic

CPE Subject Area: Finance Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Gain clarity into configuring the Comprehensive Annual Financial Report/Financial Reporting module, which provides the ability to create financial reports and statements based on a non-linear grouping of various chart of account fields. This reporting platform provides a development platform for complex statements not available through the standard reporting tools. When first reviewed, it may look like you need to have graduated from Hogwarts to be able to configure the module, but by breaking it down into the component parts, the process becomes clearer. This session explores the various configuration tables, walking through the design and development process.

#### Learning Objectives

After attending this session, you should be able to:

- Explain the configuration tables and how they relate
- Configure the tables to produce a simplified statement
- Describe the process for creating larger and more complex statements

## 242 Muggle Studies: Lessons Learned from the Rollout of Online Solicitations and Vendor Responses

Tuesday 2:00 pm - 3:00 pm

**Field of Study: Procurement** 

Type/Level: Intermediate

CPE Subject Area: Finance Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Ready to reap the knowledge of other organizations? Join our session to learn from various sites about their experiences with posting online solicitations and accepting vendor responses via the Web or both. Topics include any challenges (expected and

unexpected), lessons learned and recommendations for sites planning to implement these functionalities.

Learning Objectives

After attending this session, you should be able to:

- Discuss publishing solicitations in CGI Advantage Vendor Self Service
- Describe receiving responses from vendors via Vendor Self Service
- Describe the approach and usages by client sites for each of the above

## 243 The Goblet of Fire and Automated Pay

Tuesday 2:00 pm - 3:00 pm

Field of Study: HR/Payroll

Type/Level: Intermediate

CPE Subject Area: Personnel/HR Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Do you have a problem with automatically calculating shift differential premiums, or are you looking to automatically generate premiums for holidays without always having to enter additional details on a timesheet? If you answered yes to either question, this session is for you! Presenters will focus on the configuration of different types of automated pay criteria and demonstrate how the system feature can automate the process of several payroll calculations. There are many possibilities, and this session will also include client examples.

Learning Objectives

- Describe how the automated pay criteria feature works and the business processes it is intended to support
- Describe the configuration required to implement automated pay criteria
- Identify ways to streamline business processes and how to use the feature to support timesheet and payroll processes
- Describe how automated pay generation has been implemented at a client site

## **TUESDAY, OCTOBER 24**

## 244 Moving Your Treasure: Importing Data into Performance Budgeting-Thinking Outside the Box

Tuesday 2:00 pm - 3:00 pm

Field of Study: Budget

Type/Level: Basic

CPE Subject Area: Finance Duration in hours: 1.0 hour Onsite credits: 1.0 credit

The ability to easily load and export data is an essential part of the budget process. While simple reference data imports are common practice, is there more you can do to simplify your budget process? Join us for a session looking at unique and alternative ways that you can load data into and out of CGI Advantage Performance Budgeting that may help streamline your processes.

Learning Objectives

After attending this session, you should be able to:

- Apply best practices for when to transfer data to and from Performance Budgeting
- Describe configuration options available for transferring data to and from Performance Budgeting

## 245 Scuba Dive to New Depths with CGI infoAdvantage Administration

Tuesday 2:00 pm - 3:00 pm

Field of Study: Business Intelligence

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Prerequisite: Understanding of Central Management

Console

Ready for a deep dive into using the BusinessObjects' Central Management Console and other aspects of infoAdvantage administration? Join us and discover features that you are not using like Life Cycle Management, scheduling a report using an event, and using the query builder tool. All of this and more infoAdvantage administration topics will make this an exciting and informative session.

Learning Objectives

After attending this session, you should be able to:

- Identify common ways Central Management Console can be used
- Describe the benefits of Life Cycle Management
- Describe how to use the query builder tool

## 246 CSI Florida: Troubleshooting Advantage

Tuesday 2:00 pm - 3:00 pm

Field of Study: Technology & Architecture

Type/Level: Advanced

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Learn about the tools that are commonly used to identify and resolve technical issues for CGI Advantage! Application administrators are not only responsible for managing the application, but they're also the first ones called when an end-user runs into an error. Join us for an overview of the various troubleshooting techniques for CGI Advantage; we'll step through the resolution of real-life examples of common technical application and configuration-related problems such as null pointers, out-of-memory errors, certificate issues, exceptions, database errors and other technical issues.

Learning Objectives

After attending this session, you should be able to:

- Define the methodology and approach for troubleshooting CGI Advantage issues
- Apply useful troubleshooting tools
- Define the most common types of errors and how to approach troubleshooting for each

# 247 Digital Transformation and CGI Advantage: How does Digital Transformation Correlate to CGI Advantage ERP with Steps to Get There

Tuesday 2:00 pm - 3:00 pm

**Field of Study: General Interest** 

Type/Level: Basic

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

This session will highlight digital transformation as it relates to trends in government Enterprise Resource Planning (ERP) applications. We will cover insights from market research as well as discussions with business and IT executives while aligning those insights to market trends for digital transformation in the application of government ERP solutions. The session will apply those insights to CGI Advantage ERP 4.x in an effort to help prepare your site for further digital transformation with an eventual CGI

Advantage upgrade.

Learning Objectives

After completing this session, the attendee should be able to:

- Discuss the latest trends in the market and how they relate to public sector ERP
- Discuss digital transformation as it relates to CGI Advantage
- Initiate discussions at your site about a CGI Advantage 4.x upgrade

#### 248 Business Intelligence in CGI Advantage360

Tuesday 2:00 pm - 3:00 pm

Field of Study: General Interest, Business Intelligence

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Advantage 360 offers an array of options for accessing data within the cloud-hosted CGI Advantage solution. Each reporting option provides different benefits, depending on the intended consumer of the information. Join this session to explore various reporting/business intelligence (BI) options that exist within the delivered out-of-the-box toolset, and how our existing Advantage 360 sites are using those tools to meet their individual and enterprise BI needs.

Learning Objectives

After attending this session, you should be able to:

- Describe the available reporting/BI options included with Advantage360
- Describe the roadmap and recent enhancements to the BI solution
- Understand how Advantage360 clients are using the available tools to meet their reporting/BI requirements and needs

## **TUESDAY, OCTOBER 24**

## 249 Self-Service and Compliance Portals

Tuesday 2:00 pm - 3:00 pm

**Field of Study: Obligation Recovery** 

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge Duration in hours: 1.0 hour

Onsite credits: 1.0 credit

For years, governments have been faced with limited self-service options. Now agencies are beginning to focus on ways to improve the user experience for both individuals and business owners. This session will showcase how governments can create portals for self-service tasks such as filing a tax return, registering for a license, etc. Discover the benefits of creating portals and streamlining slow, manual and cumbersome tasks.

Learning Objectives

After attending this session, you should be able to:

- Create portals to support obligation recovery functions for a wide range of users
- Explain how self-service portals can improve the overall user experience
- Discuss the benefits of portals and their use in obligation recovery

## 251 Balancing the Books at Gringotts

Tuesday 3:15 pm - 4:15 pm

Field of Study: Financial

Type/Level: Advanced

CPE Subject Area: Finance Duration in hours: 1.0 hour Onsite credits: 1.0 credit

CGI Advantage Financial offers both check and deposit reconciliation, supporting core treasury functions in any governmental entity. However, reconciliation functions are often complicated by other factors, including payments made from interfacing systems that must still be recorded in CGI Advantage. In addition, there can be an accounting impact for those sites that prefer to use a Warrants Payable model for disbursements. Attend this session to hear how clients manage the complexity of cash reconciliation, and related treasury and accounting functions, while leveraging CGI Advantage functionality.

Learning Objectives

After attending this session, you should be able to:

- Describe the reconciliation processes
- Describe the associated accounting models and impacts
- Explain the overall impact on cash management and treasury functions

## 252 Transfiguration 101: Increasing Productivity with Spreadsheet Upload

Tuesday 3:15 pm - 4:15 pm

**Field of Study: Financial** 

Type/Level: Basic

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Imagine higher productivity at your site! While spreadsheet upload is intended as a cross-application feature, it has many practical applications in CGI Advantage Financial Management. Attend this session to hear how spreadsheet upload can effectively be leveraged not only for common business scenarios, but also for rare events that call for an efficient means of getting data into the system. This session will also focus on operational and security considerations for rollout of this functionality.

Learning Objectives

After attending this session, you should be able to:

- Describe spreadsheet upload functionality
- Explain how this functionality can be utilized at
- Identify some of the implementation considerations of spreadsheet upload

## 253 Quidditch Teamwork: Cooperative Procurement Panel Discussion

Tuesday 3:15 pm - 4:15 pm

**Field of Study: Procurement** 

Type/Level: Basic

CPE Subject Area: Finance Duration in hours: 1.0 hour Onsite credits: 1.0 credit Greater savings can lead to outcomes that matter! What is cooperative procurement, and how are clients leveraging this program to reduce costs? How can CGI Advantage be configured to meet the needs of this program? Come join the community to hear about this process in CGI Advantage and how it can bring savings to your site.

Learning Objectives

After attending this session, you should be able to:

- Describe cooperative procurement and stages
- Define key functionalities
- Summarize the benefits, including savings

## 254 Winning at Self Service: The Firebolt Supreme

Tuesday 3:15 pm - 4:15 pm

Field of Study: HR/Payroll

Type/Level: Overview

CPE Subject Area: Personnel/HR Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Discover the power of self service! This session will include the demonstration of CGI Advantage Employee Self Service and Manager Self Service features and a general approach for how sites should implement them. Recent releases have made several improvements throughout these applications to increase the usability of existing documents and activity folders across all business areas. Learn how these solution features work.

Learning Objectives

- Describe the Employee Self Service and Manager Self Service user interface
- Describe examples of employee transactions using CGI Advantage Human Resource Management, Employee Self Service and Manager Self Service
- Recall the features of Employee Self Service and Manager Self Service within Human Resource Management

## Session descriptions

### **TUESDAY, OCTOBER 24**

### 255 Don't Get Tied Down! A Deeper **Look at Budget Forms in Performance Budgeting**

Tuesday 3:15 pm - 4:15 pm

Field of Study: Budget

Type/Level: Advanced

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Ready to take a deeper look at some of the functions and features that will help you use budget forms more effectively? Look no further than the budget request filter view functionality, which provides a powerful way to look at data across budget requests and easily filter and find data. In this session, you'll explore the capabilities of this powerful tool, and hear examples of how clients are using the functionality in their budget process. You'll also learn about some recently added features to budget forms in Release 3.11 and Release 3.11.1, and how these new features can help simplify your processes.

Learning Objectives

After attending this session, you should be able to:

- Understand the different options available for setting up budget forms
- Describe system configuration options to support the budget request filter view
- Describe system configuration options to support new 3.11 form features

### 256 BusinessObjects Upgrades in **Paradise**

Tuesday 3:15 pm - 4:15 pm

Field of Study: Business Intelligence

Type/Level: Overview

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Want to know more about upgrading to the next release of BusinessObjects? Join our session to learn about planning and crafting an approach for upgrading to BusinessObjects 4.x. You'll have the opportunity to compare features and new functionality between the different releases. We'll also discuss considerations for the upgrade path, tools available, and new features that can benefit your site.

Learning Objectives

After attending this session, you should be able to:

- Identify the differences between BusinessObjects
- Describe some of the upgrade tools available
- Increase your knowledge of upgrade considerations

### **257 BIRTology: The Next Frontier**

Tuesday 3:15 pm - 4:15 pm

Field of Study: Technology & Architecture

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Leverage the rich capabilities of Business Intelligence and Reporting Tools (BIRT)! Join us for our third annual BIRT session, where we'll look at BIRT through the eyes of operations. Come ready to learn from our collective experience.

Learning Objectives

After attending this session, you should be able to:

- Discuss BIRT implementation
- Identify some operations best practices for BIRT

### 258 Leading Change: Using **Influence and Persuasion Techniques to Improve CGI Advantage Usage**

Tuesday 3:15 pm - 4:15 pm

**Field of Study: General Interest** 

Type/Level: Basic

CPE Subject Area: Business Management &

Organization

Duration in hours: 1.0 hour

Onsite credits: 1.0 credit

You have upgraded a CGI Advantage product and are excited about the new features and benefits—but your employees are resistant to the change. You're an expert in government, not psychology and persuasion, so what do you do? This session will provide tips and techniques to help you and your project team lead your agencies to strong implementation or optimization. CGI Organization Change Management experts will present a compilation of leading authors'

findings that, when applied in your user population, can increase adoption of your system and business processes.

Learning Objectives

After attending this session, you should be able to:

- Explain how change initiatives can be orchestrated to achieve intended results
- Identify different techniques that can lead to successful change within your organization

### 259 The Importance of an Onset **Operational Assessment**

Tuesday 3:15 pm - 4:15 pm

Field of Study: Obligation Recovery, **General Interest** 

Type/Level: Overview

CPE Subject Area: Finance Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Are you getting the most out of your CGI solution? Perhaps you purchased CGI Advantage Financial Management or CGI Advantage Obligation Recovery many years ago, and the excitement over the new functionality has worn off and the day-to-day operations have become basic. This session will discuss the benefits of CGI experts coming to your agency to conduct an operational assessment of how you and your team are using your software. Specifically, learn how you can improve your Obligation Recovery business processes with recommendations on how you can maximize the full potential of your solution.

Learning Objectives

After attending this session, you should be able to:

- Streamline business processes to maximize the capabilities of CGI Advantage Obligation Recovery
- Describe what an operational view is and the value of conducting an assessment

## Session descriptions

### **TUESDAY, OCTOBER 24**

### 261 Bartering Between Pirate Crews

Tuesday 4:30 pm - 5:30 pm

**Field of Study: Financial** 

Type/Level: Intermediate

CPE Subject Area: Accounting Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Inter-agency transactions involve a myriad of permutations, with many possible solutions in CGI Advantage from both a data-entry and an accounting perspective. Many sites have chosen to use the dedicated internal transactions, whether the single-document or two-document method. Others have chosen to employ charge documents, and even clones of the Acounting Based Spending (ABS) document type. Attend this session to hear from CGI Advantage sites about their reasons for selecting one or more methods for recording inter-agency transactions.

Learning Objectives

After attending this session, you should be able to:

- Explain the different internal accounting options
- List the pros and cons of each accounting option
- Describe the basic system setup required for each accounting option

### 262 Advice from Gringotts: CGI Advantage Inventory Management Panel Discussion

Tuesday 4:30 pm - 5:30 pm

**Field of Study: Procurement** 

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Come see the latest Inventory Management release, hear from clients who are in the process of upgrading and explore key functions that can take inventory management to the next level. By joining our panel discussion, you can gain insights on new features and share user needs that should be incorporated to improve the module. Participate and voice your ideas on what you would like to see in the future!

Learning Objectives

After attending this session, you should be able to:

- Define the key inventory enhancements in Release 3 11
- Describe the approach and usage adopted at client sites
- Identify the key takeaways from the discussion

### 263 CGI Advantage Human Resource Management Archiving– Let It Go

Tuesday 4:30 pm - 5:30 pm

Field of Study: HR/Payroll

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Wondering how to manage the wealth of employee information stored in Human Resource Management? Gain insights into document, employee, leave, paycheck and reference table archiving. This session will review the types of information and discuss strategies for implementing data management archiving processes in Human Resource Management. You'll also learn how data can be restored if required.

Learning Objectives

After attending this session, you should be able to:

- Describe Human Resource Management data retention requirements to meet compliance mandates
- Explain the employee information archiving processes
- Explain the document and table archiving processes
- Recall how to restore data if required

### 264 Sailing into the Sunset: After the Budget–A Look at the Processes to Close Out the Budget in Performance Budgeting

Tuesday 4:30 pm - 5:30 pm

Field of Study: Budget

Type/Level: Intermediate

CPE Subject Area: Finance Duration in hours: 1.0 hour Onsite credits: 1.0 credit

The work doesn't stop once the budget is finalized! Join us for a session to review the various activities that are completed, both inside and outside the system, to close out the year and prepare for next year's budget. Learn tips and tricks to help streamline this process, and familiarize yourself with the budget publishing features.

Learning Objectives

After attending this session, you should be able to:

- Recall the different options available for end-ofyear rollover of the budget data
- Describe system configuration options to support end-of-year processes related to requests and reference data
- Identify best practices for end-of-year budget close

### 265 Navigate the Caribbean with Financial Universes

Tuesday 4:30 pm - 5:30 pm

Field of Study: Business Intelligence, Financial

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Set course to a better understanding of key CGI infoAdvantage financial areas. This session will highlight highly used financial universes like travel and expense reporting, accounts payable and accounts receivables. You'll gain valuable insights through examples of existing baseline reports and by understanding what is being used by production sites.

Learning Objectives

After attending this session, you should be able to:

- Explain how to use the travel and expense universes
- Describe the recent changes to the accounts payable and accounts receivables universe
- Recall the reporting possibilities being used by the community and their benefits

The session schedule is subject to change. Check the registration site for the most up-to-date information on session names, times and descriptions. No advance preparation for sessions is required, unless otherwise stated.

## Session descriptions

### **TUESDAY, OCTOBER 24**

### 266 Don't Lose Wilson: CGI infoAdvantage Data Assurance and Performance Tuning

Tuesday 4:30 pm - 5:30 pm

**Field of Study: Business Intelligence** 

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

Don't get stranded on a desert island. Attend this session to improve your understanding of how the infoAdvantage data assurance process works, and learn performance techniques. Learn about common items to consider for immediate changes and ongoing performance tuning and monitoring tips to keep infoAdvantage in tip-top shape.

Learning Objectives

After attending this session, you should be able to:

- Discuss how, when and why to use data assurance reports
- Describe strategies for effectively implementing data assurance functionality

### 267 The Perfect Storm: Disaster Recovery and High Availability Preparedness

Tuesday 4:30 pm - 5:30 pm

Field of Study: Technology & Architecture

Type/Level: Intermediate

CPE Subject Area: Specialized Knowledge

Duration in hours: 1.0 hour Onsite credits: 1.0 credit

How prepared is your site for a major or even minor disaster? This session will discuss recommended high availability and disaster recovery practices. We'll mix actual customer examples with overall recommended tactics, and also discuss items such as costs associated with high availability and disaster recovery, and tools and practices that can help.

#### Learning Objectives

After attending this session, you should be able to:

- Understand concepts and terms associated with high availability and disaster recovery
- Understand many of the best practices for high availability and disaster recovery recommended by CGI and your peers
- Understand the hardware, software and staffing implications of high availability as uptime percentage requirements increase
- Understand the hardware, software, and staffing implications of disaster recovery as it relates to recovery time objectives and recovery point objectives

### **268 Minor Release Upgrades:** Learn from Your Peers

Tuesday 4:30 pm - 5:30 pm

**Field of Study: General Interest** 

CPE Subject Area: Not CPE Eligible Duration in hours: 1.0 hour

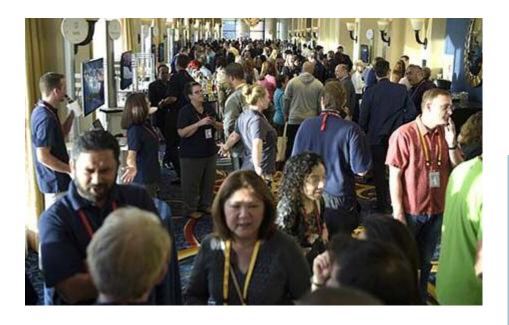
Want to hear firsthand from your peers on their real-life experiences using CGI's recommended upgrade methodology and the benefits realized through this approach? Learn how partnering with both CGI and client resources results in optimal planning, execution and subsequent go-live phases of an upgrade from one minor release of CGI Advantage 3.x to another. We'll share project specifics from inception to completion, capitalizing on the CGI Accelerate approach, to provide a complete lifecycle of a successful upgrade engagement. Finally, you'll have the opportunity to discuss available options for developing a successful strategy for your upgrade.

Learning Objectives

After attending this session, you should be able to:

- Define a strategic business case and overall upgrade approach
- Define keys to performing a successful upgrade
- Identify organizational constraints and how to overcome them
- Describe how CGI services can provide streamlined, high-quality results

## Collaboration





### Keynote speaker

### Kai Kight

Tuesday Morning Keynote Speaker

As a classical violinist turned innovative composer, Kai Kight uses music as a metaphor to inspire individuals and organizations across the world to compose paths of imagination and fulfillment. Inspired by his own mother who, when diagnosed with cancer, revealed regrets of not bringing her ideas to the world, Kai is on a mission to spark a global mindset shift in which ingenuity is the norm, not the exception.

### **Networking**

The Forum provides outstanding networking opportunities for attendees to share best practices and build relationships with CGI Advantage users and experts from across the country.

"The CGI Forum is the perfect place to not only stay up to date on the latest functionality of the various applications, but to get great ideas from CGI staff and other CGI Advantage sites. The onsite networking has allowed me to meet amazing people who I have turned to time and time again for guidance and inspiration on how to tackle my organization's challenges."

Robin Morgan Steering Committee Chair Southwest Florida Water Management District

Showcase Schedule	Start	End
Sun., Oct. 22	4:00 pm	6:00 pm
Mon., Oct. 23	9:30 am	12:00 pm
	2:30 pm	5:30 pm
Tues., Oct. 24	9:30 am	11:30 am
	1:45 pm	4:30 pm

### **Showcase**

The Showcase is your opportunity to explore all aspects of the CGI Advantage ERP solution, including Financial Management, Procurement, Human Resource Management, Performance Budgeting, Case Management, Obligation Recovery, Regulatory Management and Business Intelligence, as well as the many services CGI Advantage has to offer. Staffed with CGI Advantage subject matter experts, the Showcase is the place to gain in-depth knowledge about the solution and important topics, or to ask detailed questions. Once again, we're offering the ability to schedule one-on-one time with our product experts in the Showcase – providing an opportunity to get answers to your most pressing questions.

The Showcase is also the venue to meet CGI's valued partners. These best-of-breed solution providers partner with CGI to enhance our ERP solution. Stop by to learn how our partners strengthen our solutions and how your organization can optimize its ability to get the most out of CGI Advantage.

Join our roundtables for an opportunity to learn and share expertise and best practices with your peers, discuss practical approaches for success in your field and develop strong networks. You'll gain valuable insights on relevant and timely topics, and have the opportunity to discuss common challenges and solutions that can help you and your peers become more successful.

#	Topic Area	Торіс	Topic Description
1.	Budgeting	Welcome to CGI Advantage Performance Budgeting! Upgrading from BRASS	Recently upgraded from BRASS to Performance Budgeting? Thinking of upgrading? Join us for a discussion on the transition and benefits, and tap into the lessons learned.
2.	Budgeting	Budget Book Publishing: A Discussion	Join us for a conversation on the process of publishing the budget book. You'll gain insights on the tools used and process followed as well as the challenges and lessons learned.
3.	Budgeting	Tracking Measures and Performance in CGI Advantage Performance Budgeting	Learn how you can leverage Performance Budgeting to help develop and interpret performance measures. We'll talk about how to set up the performance management data in the system and how it is used in the budget process.
4.	Budgeting	The CGI Advantage Performance Budgeting System Administrator: What It Entails	Join us for a discussion on the different responsibilities of the Performance Budgeting Administrator and the various tasks that take place as the budget season progresses. We'll discuss challenges as well as tips to help you in your role.
5.	Business Intelligence	CGI Advantage Reporting (covering Human Resource Management, Financial, Performance Budgeting, Procurement)	Reporting on information is a critical part of any ERP solution. Share experiences and lessons learned on finding and reporting on information using CGI infoAdvantage universes. This session will cover all CGI Advantage functional areas.
6.	Business Intelligence	Best Practices and Advanced Reporting Topics	CGI infoAdvantage has powerful reporting features that turn information into a strategic asset. Share experiences on how you have further leveraged infoAdvantage and BusinessObjects to provide advanced reporting and analytics to your end-user community.
7.	Business Intelligence	Report Design Lessons Learned	Share experiences and lessons learned on effective report design and documentation that can help your broader user community leverage and manage your business intelligence content for the long term.
8.	Business Intelligence	Transparency and Open Data	Constituents and stakeholders expect information to be available to them in this digital world. Share your site's experience and initiatives to provide information to citizens via a transparent site or open data policies.
9.	Business Intelligence	Leveraging Warehouse vs. Alternate Approaches	Discuss the pros and cons of using a warehouse vs. alternate approaches. Join this discussion to learn how to educate the user community depending on the selected approach.
10.	Business Intelligence	Business Intelligence at Your Fingertips: Mobility	Learn about the adoption of business intelligence delivered through mobile solutions and approaches that sites are considering or have taken to move their mobile initiatives forward.
11.	Business Intelligence	Combining CGI Advantage and Non-CGI Advantage Reporting Information	Discover how sites currently manage combining CGI Advantage data with non-CGI Advantage data to produce reports, dashboards and other reporting information required by users.

#	Topic Area	Торіс	Topic Description
12.	Business Intelligence	Dashboards and Analytics	Have an open discussion on how other users are leveraging dashboards and analytics within the ERP space. Share knowledge on how these robust reporting tools can provide status at-a-glance, help identify positive and negative trends, and allow users to move from summary-level to detail-level information for root-cause analysis.
13.	Financial Management	Lessons Learned from Fiscal Year Close	Those sites on a July fiscal year will have recently completed most of their year-end processing, while those on an October fiscal year have just started these activities. Attend this discussion to hear lessons learned from your peers on the entire year-end closing process.
14.	Financial Management	Cost Allocation Implementation Considerations, Including COA Expansion	This discussion will focus on both operational and functional considerations when implementing cost allocation. Now that you have been live for a while, new reporting and cost allocation needs may have emerged. You may have a business need to add more chart of accounts to your existing structure to support cost allocation. Attend this discussion to hear how cost allocation has been implemented, how it's incorporated into daily and monthly cycles, and how various challenges can be overcome.
15.	Financial Management	Expanding the Footprint of Accounts Receivable	While some core accounts receivable functionality has been implemented at most CGI Advantage Financial sites, this discussion will focus on how that footprint can be expanded to include finance charges, payment plans and other functionality that tends to be under-utilized.
16.	Financial Management	All Things Fixed Assets	This roundtable will focus on the entire lifecycle of fixed assets in CGI Advantage Financial. Attend this discussion to hear from peers on what specific functions have been implemented and how you can improve on specific aspects of asset management in your organization.
17.	Financial Management	Financial-Specific Archiving	Several baseline archiving options now exist in CGI Advantage Financial, including journal, budget, document and cost accounting archiving processes. Attend this roundtable for a discussion on archiving, and learn which processes might be most applicable to your site.
18.	General Interest	Web-Based, Self-Guided Training to Improve Accuracy and Approval Rates	What end-user training could significantly reduce help desk workloads and/or improve data entry accuracy and document approval rates? Webbased, self-guided learning courses that are tailored to your data and processes can improve efficiency and productivity for routine (and non-routine) tasks. They can range from teaching a single, very brief and focused task to a process involving multiple tasks/stages. Join our discussion on how this training can help you.
19.	General Interest	CGI Advantage360: Moving to the Cloud	Meet other Advantage360 and on premise CGI Advantage users and discuss insights, considerations, lessons learned and the benefits you encountered by moving to the cloud with Advantage360.
20.	General Interest	Upgrade Services	What determines when an upgrade is needed? What can you expect when you upgrade? Share your upgrade experiences, ask questions and gain insights on how to make the most of your upgrade.
21.	General Interest	CGI Advantage ERP Managed Services	Explore CGI Managed Advantage options with peers who are using this delivery method. Join us if you're interested in CGI's custom maintenance and/or hosting services to learn if any of our offerings are a good fit for your organization's needs.

#	Topic Area	Торіс	Topic Description
22.	General Interest	Change Management Strategies for Successful Projects	You have figured out the technology and the process changes. What about the people side? Organizational development ensures that the people side of change management is also addressed. Join this discussion for ideas on how to manage potential impacts to culture due to new initiatives. Examples include a realignment of the organizational structure, new software implementations and general process improvement projects.
23.	General Interest	Leveraging CGI Advantage Obligation Recovery to Achieve Higher Revenues	Proven to increase collections by 10-45%, Obligation Recovery is the solution module called upon by clients who need a strong collections solution. Join us to discuss collections capabilities, funding options and implementation options.
24.	General Interest	Add Case Management to Your Toolkit!	Join this discussion to discover how CGI Case Management allows you to extend the reach of your CGI Advantage solution. Learn how you can address a wide range of business issues with configured process flows, workflows, attachment handling and uniform execution of your best practices.
25.	Human Resource Management	Family and Medical Leave Act (FMLA) Tracking	How does your site currently manage the provisions of FMLA? Discuss methods for tracking leave using CGI Advantage Human Resource Management and supporting external systems or processes.
26.	Human Resource Management	Benefits Enrollment	Are you considering using benefits enrollment in CGI Advantage Employee Self Service in the future? Do you have insights to share with other clients about the benefits enrollment process? If you answered yes to either question, then plan to attend this valuable exchange of information based on user experiences.
27.	Human Resource Management	Timesheets	How do you enforce validations to minimize data entry errors on timesheets? Do you use CGI Advantage features such as easy fill, copy from or generate timesheets process? Discuss best practices with other clients on how you make your timesheet process efficient.
28.	Human Resource Management	Payroll Accounting Management (PAM) Reconciliation	Learn how other sites are reconciling payroll data with the general ledger accounts through PAM. The group conversation will focus on specific tools and processes that sites use to reconcile PAM for their organization. We'll discuss the steps users are taking to reconcile the data for their site.
29.	Human Resource Management	Mass Change Process	How do you handle mass change in terms of re-orgs and other events requiring changes to volumes of records? CGI Advantage Human Resource Management has multiple mass change job options available to you. Share which ones you use, and learn tips and tricks on how mass changes are done within the system.
30.	Human Resource Management	HR Mobile Apps	Do you use CGI Advantage HR Mobile Apps? Do you know that your employees and managers can submit, approve, and view time and leave information on the go? Discuss how you're handling the remote access needs of your employees, and learn from other clients on how mobile apps can help.
31.	Human Resource Management	Recruiting and Staffing— How Is Your Site Handling This Process?	How is your site managing recruiting? Have you included a third-party vendor? Join us to discuss how the recruiting process is being supported at your site, and learn from others as they share issues and resolutions addressed with their implementations.

#	Topic Area	Topic	Topic Description
32.	Human Resource Management	CGI Advantage Human Resource Management for School Districts	Meet other attendees from Human Resource Management school district sites and exchange ideas and best practices. We'll focus on networking and discuss topics that specifically impact the operation of school districts.
33.	Human Resource Management	Family and Medical Leave Act (FMLA) Tracking	How does your site currently manage the provisions of FMLA? Discuss methods for tracking leave using CGI Advantage Human Resource Management and supporting external systems or processes.
34.	Procurement	Managing Vendor Self Service	Attend this roundtable to discuss the future of CGI Advantage Vendor Self Service. Exchange insights on how to better manage the system as it transforms into a portal for multiple user bases such as vendors, grantees, auction bidders, and perhaps even customers in the future.
35.	Procurement	Contracts Management	How are sites managing contracts? Does CGI Advantage provide all the tools to effectively manage the contract lifecycle? What steps can we take to improve the module? Learn about effective strategies to manage contracts with the latest release of CGI Advantage and how it can be improved.
36.	Procurement	Request for Proposal Processing	How many sites currently process RFPs in CGI Advantage and utilize CGI Advantage Vendor Self Service to capture vendor proposals? How is this sourcing process different from the others? Come join the discussion on what can be done to accommodate RFP processes in CGI Advantage.
37.	Procurement	Performance Inquiries and Reports	What are the procurement inquiries or reports that you use today to measure your buyers' performance? What are some fundamental inquiries that should be provided out-of-the-box? Join this discussion to hear how your peers are using CGI Advantage for inquiry and reporting purposes, and share inputs that can be used for future improvements.
38.	Procurement	Procurement on a Mobile Device?	As technologies migrate to a mobile-first approach, can procurement processes migrate to function on mobile devices? What mobile procurement functions are currently supported in CGI Advantage? Join your peers in understanding the current mobile offerings, and exchange the latest insights on migrating from a desktop to a smartphone or tablet.
39.	Technical & Architecture	CGI Advantage Operations	Join this discussion on CGI Advantage operations, including performance tuning, troubleshooting and browser support. Exchange ideas based on your experience, and hear how others are leveraging these features.
40.	Technical & Architecture	CGI Advantage 4.0 User Experience	Join this discussion on CGI Advantage 4.0 user experience, share ideas on features and gain valuable insights from other users.
41.	Technical & Architecture	Migration to Business Intelligence and Reporting Tools (BIRT)	Worried about the transition to BIRT? Have successful strategies to share with your peers? Join us to discuss your BIRT migration and support strategy, and hear from others about their successes.
42.	Technical & Architecture	Security and Workflows	It's important to keep data secure as it moves through workflows. Join us to gain the latest insights on this critical topic, and discuss CGI Advantage security and workflow topics with your peers.
43.	Technical & Architecture	Integrations	Join us for a discussion on CGI Advantage integrations, share your experience and learn from your peers on how they manage integrations at their site.
44.	Technical & Architecture	Technology Roadmap	Join us to discuss and provide your feedback on the CGI Advantage technology roadmap, and help shape the future of our technology. We'd love to hear your ideas!

## Community

### **Attendees from Forum 2016**

Attendees identify networking as a top reason for attending the Forum year after year. Be a part of the CGI Advantage community! Join the list of organizations from across the country that have participated in the Forum.

State of Alabama

Aldine Independent School District (TX)

Diotriot (174)

City of Anaheim (CA)

Anne Arundel County Public

Schools (MD)

State of Arizona

City of Austin (TX)

**Baltimore County (MD)** 

**Baltimore County Public Schools** 

(MD)

City of Cincinnati (OH)

**Cobb County (GA)** 

Colorado Division of Parks and

Wildlife

State of Colorado

**Columbus Consolidated** 

Government (GA)

City of Dallas (TX)

**Fulton County (GA)** 

City of Gainesville (FL)

City of Garland (TX)

**Genesee County (MI)** 

**Grand Rapids (MI)** 

City of County of Honolulu (HI)

**Idaho Transportation Department** 

State of Iowa

Kansas City (MO)

**Kent County (MI)** 

Commonwealth of Kentucky

Los Angeles County (CA)

City of Los Angeles (CA)

**State of Maine** 

County of Maricopa (AZ)

Mecklenburg County (NC)

City of Mesa (AZ)

Michigan Municipal Services

**Authority (MMSA)** 

State of Michigan

State of Minnesota

City of Modesto (CA)

**Monterey County (CA)** 

City of New York (NY)

City of Norfolk (VA)

**Oakland Intermediate School** 

District (MI)

Ocean County (NJ)

Olmsted County (MN)

Orange County (CA)

Orange County (FL)

Palm Beach County (FL)

School District of Philadelphia (PA)

Pima County (AZ)

City of Portland (OR)

**Prince William County Public** 

Schools (VA)

City of Roanoke (VA)

City of Rockville (MD)

San Diego County (CA)

San Mateo County (CA)

Savannah-Chatham Public

Schools (GA)

Southwest Florida Water

**Management District** 

**Suffolk County (NY)** 

City of Tucson (AZ)

Tulare County (CA)

State of Utah

County of Ventura (CA)

**State of Vermont** 

Volusia County (FL)

Wake County (NC)

State of West Virginia

**Westchester County (NY)** 

State of Wyoming



## Community

### **Networking events**

Sunday, October 22



### **Showcase Reception**

Don't miss the opportunity to chat with Showcase partner vendors and CGI product experts. Get started on learning more about CGI Advantage and partner products and find the answers you've been looking for in this relaxed kick-off to CGI Forum 2017.

Don't miss the opportunity to chat with Showcase partner vendors and CGI product experts. Get started on learning more about CGI Advantage and partner products and find the answers you've been looking for in this relaxed kick-off to CGI Forum 2017.

### **Welcome Reception Island Party**

Don your favorite island wear and meet up with CGI and your fellow Advantage peers for a welcome reception full of the sights, sounds and cuisine of the islands.



### Monday, October 23



### **CGI Advantage Users' Group Business Luncheon**

Enjoy lunch while networking with your fellow user community members and listening to remarks and important updates by your Users' Group Steering Committee.

#### Universal Studios Florida™

Get ready for one of the biggest parties CGI has ever thrown because we've reserved The Wizarding World of Harry Potter™—Diagon Alley™ at Universal Studios Florida™ just for you! All night long, you'll have unlimited access to the

shops and establishments of Diagon Alley™, including the Leaky Cauldron™, Weasleys' Wizard Wheezes, and Ollivanders™ wand shop. Experience the darker side of magic in Knockturn Alley. Then get ready for an adventure on the multi-dimensional thrill ride, Harry Potter and the Escape from Gringotts™.

It's a night of unforgettable magic and excitement—and it's all yours!



### Tuesday, October 24



### Peer-To-Peer Roundtable Luncheon

Roundtables give attendees an opportunity to learn from their peers by sharing expertise and discussing practical approaches to success in their field—all while developing stronger networks. Table leads will be on hand to spark conversation. The table topics can be found on page 22 of this brochure. You will have the opportunity to sign-up for your preferred table topic when you register online for the conference.

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## Plan to attend

### Registration

CGI provides all CGI Advantage sites with one complimentary registration. Redemption details will be sent to your site's primary contact. Additional registrations are available at the fees listed below. Registration includes complimentary conference receptions and scheduled meals.

Early Bird Registration (on or before September 1) \$995 Late Registration (after September 1) \$1,195

#### For conference inquiries contact:

Michelle Rives, CGI Event Manager 11325 Random Hills Road Fairfax, Virginia 22030 703-267-8041 michelle.rives@cgi.com

Remember the early bird discount expires after September 1. Register early to save \$200 and secure your spot.

### **Hotel information**

A block of rooms has been set aside at the Loews Sapphire Falls.

Loews Sapphire Falls 6601 Adventure Way Orlando, FL 32819

Phone: (407) 503-5000 Reservations: (866) 360-7395

Check in: 4:00 PM Check out: 11:00 AM

Room rate: \$199 USD per night (single/double occupancy) + tax

Hotel reservation cut-off date: Saturday, September 30, 2017\*

#### Two ways to make a reservation:

- 1. Call the hotel's group reservations number at (866) 360-7395 and reference "CGI Advantage Forum 2017"
- 2. Visit the CGI Forum 2017 reservation website: http://bit.ly/Forum2017reservations

### **Transportation**

The Loews Sapphire Falls is located approximately 20 miles from Orlando International Airport (MCO). Total transportation time to the hotel is about 20-25 minutes, depending on traffic and time of day. There are several options for ground transportation listed below.

#### Taxi cabs

The taxi stand is located on Level 1 of Orlando International Airport, just outside of the baggage claim area. Taxi fares to the hotel from MCO are approximately \$45.00 USD\*\* one way.

#### Mears shuttle service

Mears shuttle is the official airport shuttle service of MCO. The cost per passenger from MCO to the Loews Sapphire Falls is approximately \$21.00 USD one way / \$33.00 roundtrip\*\*. Reservations can be made online at mearstransportation.com

or by phone at (855) 463-2776. Reservations made online are eligible for a 10% discount when you enter the discount code WEB10.

### **Rental cars**

Orlando is the largest rental car market in the world, with most of the major car rental companies conveniently located onsite at the airport, without the need for a shuttle bus to pick up your rental car. Rental car companies are located on the A-Side and B-Side of the terminal on the Ground Transportation Level (Level 1). Orlando International Airport offers airline check-in services on level "R1" of the parking garages where rental cars are returned. The "A" Garage location is located on the west end and the "B" Garage location is on the east end (i.e., the ends nearest the entrance ramps).

#### Hotel parking

Self-parking overnight: \$22.00+tax per night\*\*

Valet parking overnight: \$29.00+tax per night\*\*

\*\*Transportation rates and times are estimated and are subject to change



<sup>\*</sup> Once the room block is filled or the hotel reservation cut-off date has passed, rooms will be reserved on a space-available basis and may be subject to higher rates.



# Build your schedule

Use this worksheet to plan your session schedule and then go online to cgi.com/forum2017 to complete your registration for CGI Forum 2017.



### MY MONDAY SESSIONS

9:45 am – 10:45 am	Sessions
1st Choice #	Title
2nd Choice #	Title
11:00 am – 12:00 pm	Sessions
1st Choice #	Title
2nd Choice #	Title
1:30 pm – 2:30 pm	Sessions
1st Choice #	Title
2nd Choice #	Title
2:45 pm – 3:45 pm	Sessions
1st Choice #	Title
2nd Choice #	Title
4:30 pm – 5:30 pm	Sessions
1st Choice #	Title
2nd Choice #	Title

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9:30 am – 10:30 am	Sessions	
1st Choice #	Title	
2nd Choice #	Title	
10:45 am – 11:30 am	Sessions	
1st Choice #	Title	
2nd Choice #	Title	
11:30 am – 12:45 pm	Topics	
Peer-to-peer lunch topic	:1	
Peer-to-peer lunch topic	2	
Peer-to-peer lunch topic	23	
12:45 pm – 1:45 pm	Sessions	
1st Choice #	Title	
2nd Choice #	Title	
2:00 pm – 3:00 pm	Sessions	
1st Choice #	Title	
2nd Choice #	Title	
3:15 pm – 4:15 pm Sessions		
1st Choice #	Title	
2nd Choice #	Title	
4:30 pm – 5:30 pm Sessions		
1st Choice #	Title	
2nd Choice #	Title	



Founded in 1976, CGI is one of the largest IT and business process services providers in the world, delivering high-quality business consulting, systems integration and managed services. With a deep commitment to providing innovative services and solutions, CGI has an industry-leading track record of delivering 95% of projects on time and within budget, aligning our teams with clients' business strategies to achieve top-to-bottom line results.

### Cunningham, Kim

From:

Newell, Christopher

Sent:

Wednesday, August 09, 2017 8:53 AM

To:

Freeman, Josh; Agendaitems

Subject:

RE: Travel request

Fund 628 Dept. 2280 Unit 2582

Object 889 (Training) for the seminal fee Object 1124 (Travel) for the other expenses

As noted, I will turn some of the details over to Purchasing, so that arrangements like Ground transport can be coordinated if any others are attending (we have had 4 each of the past 2 years.) Prices seem to change daily, so I went mid range on the request.

Christopher A. Newell Chief Information Officer Genesee County 1101 Beach St. Suite 239 Flint, MI 48502 810-237-6103

From: Freeman, Josh

**Sent:** Wednesday, August 9, 2017 8:22 AM **To:** Newell, Christopher; Agendaitems

Subject: RE: Travel request

What account number are you using to pay for this?

Also, as an FYI, Southwest leaves from Flint for around \$400.00 round trip.

### Joshua M Freeman

Board Coordinator Genesee County Board of Commissioners 1101 Beach St Room 312 Flint MI 48502

(810) 762-7762 Office (810) 397-3797 Cell jfreeman@co.genesee.mi.us

From: Newell, Christopher

Sent: Tuesday, August 08, 2017 4:39 PM

To: Agendaitems

Subject: Travel request

Attached is a travel request for consideration at the next Government Operations Committee meeting.

This is for the annual CGI Advantage Forum. I have attended this conference the past 2 years, and, if approved for the travel, I have been invited to join one of the panel discussions.

I have included the full conference brochure as a part of the attached, please let me know if you would prefer only the cover memo or an edited version of the brochure.

Thank you.

Christopher A. Newell Chief Information Officer Genesee County 1101 Beach St. Suite 239 Flint, MI 48502 810-237-6103