



38TH ANNUAL MONTANA MUNICIPAL INSTITUTE





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Conference center wifi password:

Extension online

Username:

Password:

Sunday, May 6th

3:00 -
4:30 PM

Registration- Wine and Cheese Reception
Bighorn-Yellowstone

4:30 -
6:00 PM

Welcome & Orientation

5:00 -
6:00 PM

Team Building/ Ice Breaker Activities

Monday, May 7th

CLERK AGENDA

TREASURER AGENDA

7:00 -
8:00 AM

Breakfast- All American
Ballroom

8:00 -
9:00 AM

Ethics in Municipal Government
Dan Clark, MSU Local Government Center
Bighorn-Yellowstone

An in-depth review and discussion of the Montana Code of Ethics as it relates to elected and appointed municipal officials

Learning Outcomes:

- Understand the statutory elements of the Montana Code of Ethics in Government
- Understand the concepts of "conflict of interest" and "nepotism"

9:00 -
9:50 AM

Admin Duties of the Municipal Clerk 2
Linda Burley
Bighorn-Yellowstone

This is a small group practicum in the proper and legally sufficient preparation of municipal ordinances and resolutions in conformance with Montana law

Learning Outcomes:

- Know the legal requirements for maintaining the Ordinance Book, Resolution Book and Minute Book
- Understand the legal requirements for preparation, publication, adoption and posting of municipal ordinances and resolutions
- Know the legal requirements for codification of ordinances
- Be able to prepare a resolution for council adoption
- Be able to prepare drafts of legally sufficient municipal ordinances for review by the city attorney and council adoption

Financial Terminology

Nikki Brummond, Clerk/Treasurer,
City of Lewistown
Boulder

A session to review the commonly used financial terms and processes related to municipal budgeting, finance, and accounting.

Learning Outcomes:

- Be able to communicate complex financial information in simple and effective ways

**9:50 -
10:05 AM**

Morning Break
Coffee and Hot Tea



Developing a Council Orientation Packet

Dan Clark, MSU Local Government Center,
Stacey Amundson, & Liz Roos

Bighorn- Yellowstone

An overview of the information municipal clerks can provide to newly elected council members and the importance of preparing a council packet. The council packet is the information that the mayor and council use to make informed decisions

Learning Outcomes:

- Understand the opportunities for municipal clerks to educate newly elected council members
- Know what information should be provided to newly - elected council members, including basic information about your municipality, state/local laws, public records, open meetings, ethics, proper use of email, etc.
- Be Able to develop a plan for orienting newly-elected council members
- Know the importance of a council packet, what should be included in the packet, and how to prepare the packet

Fundamentals of Municipal Budgeting 2

Darla Erickson, Montana Local Government Services Bureau

Boulder

An introduction to the Montana Municipal Budgeting and Reporting System (BARS) with emphasis on the preparation, implementation and monitoring of the municipal budget

Learning Outcomes:

- Know the BARS chart of accounts, the tax and non-tax levy requirements schedules and changes in state budget law
- Know the legal basis for municipal taxation
- Know the financial relationship between municipal and county government, especially with the offices of the county treasurer, clerk and recorder and assessor

**10:05 -
12:00 PM**

**12:00 -
1:00 PM**

Lunch- Honey Mustard Chicken
Ballroom



Stress Management

Dan Clark, MSU Local Government Center

Bighorn- Yellowstone

A review and discussion of effective strategies to reduce individual stress in the workplace

Learning Outcomes:

- Know strategies for effective stress reduction and stress management in the workplace

Year-End Closing

Darla Erickson, Montana Local Government Services Bureau

Boulder

A hands on session that illustrates the proper steps for year-end closing entries

Learning Outcomes:

- Know the resources available to complete the year-end closing entries.
- Know and Understand the proper steps to year-end closing entries.
- Be able to complete year-end entries.

**1:00 -
2:50 PM**

**2:50 -
3:05 PM**

Afternoon Snack
Popcorn, Trail Mix, Chips & Dip, Iced Tea, & Lemonade

**3:05 -
4:00 PM**

Prep of Minutes 2
 Chelsea Peterson, Michelle Dyckman, & Liz Roos
Bighorn- Yellowstone
 A detailed review, discussion and practicum dealing with the preparation of legally sufficient minutes of the council meeting

Learning Outcomes:

- Be able to prepare official minutes of record that will meet legal requirements

Internal Controls
 Nikki Brummond, Clerk/Treasurer,
 City of Lewistown
Boulder
 A review of the structure of and procedures for establishing internal controls.

Learning Outcomes:

- Know the essential elements of effective internal financial controls and how internal controls can help prevent fraud and minimize losses
- Understand the claims process and the importance of monitoring expenditures
- Be able to establish standardized financial management policies and procedures (SOPs)
- Know the fundamentals of payroll administration




**4:00 -
5:00 PM**

Preventing Discrimination and Harassment in the Workplace
 Jyl Shaffer, Director, MSU Office of Institutional Equity
Bighorn- Yellowstone
 An overview of unlawful discrimination and harassment in the workplace, including protected classes and other protections, along with prevention strategies for a public organization

- Understand the legal requirements and risk management exposures in processing discrimination, sexual harassment claims and employee grievance procedures
- Be able to identify and address the types of behavior that are unacceptable in a professional setting
- Be able to implement strategies to prevent harassment in the municipal office

6:00 PM

Sponsored Dinner
Boulder
 Boursin Stuffed Chicken Breast with Rosemary
 Roasted Red Potatoes and Vegetables.



Tuesday, May 8th

CLERK AGENDA

TREASURER AGENDA

**7:00 -
8:00 AM**

Breakfast- Montana Breakfast
Ballroom

**8:00 -
9:50 AM**

Clerk/Treasurer to Clerk/Treasurer

Tracy Rebo, Agnes Fowler, Stacey Amundson, Brenda Schneider,
Doris Pinkerton, Jodie Campbell, Jodi Rogers, & Liz Roos

Stillwater-Boulder

An interactive discussion and review of commonly asked questions and challenges faced by municipal clerk and treasurers

Learning Outcomes:

- Identify and avoid the most common mistakes clerks/treasurers tend to make.

**9:50 -
10:05 AM**

Morning Break
Coffee and Hot Tea

**10:05 -
12:00 PM**

Communicating with Public

Marna Daley, PIO, US Forest Service - Bozeman

Stillwater-Boulder

A review of the techniques of effective communication with the public

Learning Outcomes:

- Know the preferred steps in communicating with a hostile audience
- Know basic procedures that will facilitate council communication with the audience
- Know the principles of effective customer service

Municipal Audit

Magda Nelson, Montana Local Government Services Bureau

Bighorn

A review of the legal requirements for and purposes of the annual municipal audit

Learning Outcomes:

- Know the purpose of and legal requirements for the municipal audit, how to work with auditors, and the importance of the audit opinion and of compliance

**12:00 -
1:00 PM**

Lunch- Deli Corner
Ballroom

**1:00 -
2:00 PM**

Writing Policies

Nikki Brummond, Clerk/Treasurer,
City of Lewistown

Stillwater-Boulder

An overview of the essential components of a fair and consistent policy

Learning Outcomes:

- Know the components of a good policy
- Be able to determine the purpose of a policy
- Be able to write a policy

GASB Update

Magda Nelson, Montana Local Government Services Bureau

Bighorn

A review of the changes imposed by the Governmental Accounting Standards Bureau (GASB) and how they affect municipal procedures

Learning Outcomes:

- Be Able to apply the accounting requirements of the GASB

State Resources Available to Municipal Treasurers & Finance Officers

Anthony Cacace, State Social Security Administrator; Chet McLean, State Audit Reviewer; & Vickie Kemmerer, State Audit Reviewer

Bighorn

A review of the state resources available to municipal treasurers and finance officers including the State Social Security Administrator and Local Government Services. Participants will learn about appropriate participation in Social Security, LGS's proposed regulatory basis of reporting, and the process when an audit arrives at LGS.

Learning Outcomes:

- Be able to identify which divisions and bureaus of the State of Montana Department of Administration are able to assist municipal officials with financial matters
- Understand the basic requirements for participation in Social Security as a public employer
- Be able to generally describe the proposed regulatory basis of reporting
- Know what happens to an audit after it is submitted to the state

Effective Listening

Mark Willmarth, Vision West Consulting

Stillwater-Boulder

An overview of effective listening techniques to aid in the communication with mayors, councils, fellow employees and the public.

Learning Outcomes:

- Understand the difference between hearing and listening
- Be able to practice the art of listening
- Understand how to best communicate with the public

2:00 -
3:20 PM

Afternoon Snack

Ice Cream Social

3:20 -
3:35 PM

Maintaining Historical Records

Jodie Foley, State Archivist of Montana

Stillwater-Boulder

An overview of the legal requirements and of best record management practices

Learning Outcomes:

- Be able to manage the storage and preservation of several types of historical documents
- Be able to identify and mitigate potential causes for record deterioration
- Be able to assess current store conditions and materials and subsequently recommend improvements to the local governing board

3:35 -
5:00 PM

Gas Tax

Kelly Lynch, Montana League of Cities and Towns

Bighorn

A review of the new Gas Tax legislation and its implementation.

Learning Outcomes:

- To review the existing law and its implementation
- Discuss implementation process and impacts
- To understand the allocation and distribution of Gas Tax revenues

6:00 PM



Sponsored Dinner
Please RSVP to: rmiller@mmia.net

Old Chicago Restaurant



Wednesday, May 9th

CLERK AGENDA

TREASURER AGENDA

7:00 -
8:00 AM

Breakfast- All-American
Yellowstone-Bighorn

8:00 -
9:00 AM



Recognizing & Avoiding Workplace Violence
Officer Tom Keightley, City of Billings Police Department
Stillwater-Boulder

An in-depth discussion of workplace violence and related communication skills

Learning Outcomes:

- Understand the potential for violence in the workplace and how to deal with it

9:00 -
9:50 AM

Safety in the Workplace
DLI & Britani Laughery, MMIA
Yellowstone-Bighorn
An overview of federal and state laws, along with best practices used, to ensure workplace safety

Learning Outcomes:

- Be able to identify the federal and state laws pertaining to workplace safety
- Be able to recall workplace safety best practices and procedures for reporting workplace accidents

Funding Capital Replacement
Jodie Campbell, Clerk/Treasurer
& Craig Erickson, Great West Engineering, Inc.
Missouri
An overview of establishing and funding a municipal capital improvement program (CIP).

Learning Outcomes:

- Know the importance of adopting and funding a Capital Improvement Program (CIP) and the legal requirements involved in implementing a CIP

9:50 -
10:05 AM

Morning Break & District Group Pictures
Coffee and Hot Tea

10:05 -
12:00 PM



Risk Reduction in Personnel Management 2
Angela Simonson, MMIA
Stillwater
An intensive review and application of policies and practices to reduce risk exposure in managing municipal employees

Learning Outcomes:

- Understand the legal requirements and risk management exposures in processing discrimination, sexual harassment claims and employee grievance procedures
- Know the risk exposures arising from improper human resource management practices
- Understand and be able to perform the responsibilities of a supervisor concerning

ERIC & Payroll Reporting
Jenny Weigand, MPERA
Boulder
A review of the requirements and best practices of reporting payroll and retirement information to state and federal agencies

Learning Outcomes:

- Be able to prepare payroll and meet the related reporting requirements

**10:05 -
12:00 PM**

evaluation and improvement of an employee's performance (Performance evaluation and documentation in personnel records)

- Understand the importance of adhering to written discipline and grievance procedures
- Be Able to apply effective and legally defensible procedures in the conduct of all personnel hiring, evaluation and termination proceedings



**12:00 -
1:00 PM**

Lunch- Baked Potato Bar
MMCT & FOA Semi-Annual Meeting
Yellowstone



**1:00 -
2:50 PM**

Reasonable Suspicion Testing
Sam Morris, ChemNet
Stillwater

An overview of the federal and state regulations of reasonable suspicion testing including a discussion of the signs, symptoms and effects of alcohol or controlled substance use, how to approach an employee and initiate reasonable suspicion testing, documentation and handling difficult situations

Learning Outcomes:

- Know the physical, behavioral, speech and performance indicators of substance abuse
- Understand the drug and alcohol regulations that apply to reasonable suspicion testing
- Be able to approach employees in a professional and rational manner
- Be able to complete required documentation

Grant Application & Administration
Jodie Campbell, Clerk/Treasurer,
Town of Cascade &
Kathy Grainger, City of Glasgow
Boulder

A review and discussion of effective grant application procedures including administrative requirements for a successful grant application.

Learning Outcomes:

- Know the availability and sources of grants and loans

**2:50 -
3:05 PM**

Afternoon Snack
Sweet Tooth & Soda



**3:05 -
5:00 PM**

Real Colors
Dan Clark, Director, MSU Local Government Center
Bighorn - Yellowstone

An exciting, practical and enjoyable tool that brings temperament theory and personality into real life applications to enhance effective working relationships

Learning Outcomes:

- Identify the participant's temperament style
- Understand how temperament styles interact
- Be able to quickly assess temperament styles of others
- Describe how temperament style understanding can increase positive communication between municipal officials and with the public

6:00 PM



Black Mountain Software
Please RSVP to: Kimn@blackmountainsoftware.com
Boulder

Sponsored user meeting

Thursday, May 10th

CLERK AGENDA

TREASURER AGENDA

**7:00 -
8:00 AM**

Breakfast- Montana Breakfast
Yellowstone-Bighorn

**8:00 -
9:00 AM**

Roles & Responsibilities

Dan Clark, Director, MSU Local Government Center
Stillwater-Boulder

A review and discussion of the roles and responsibilities of appointed and elected municipal officials

Learning Outcomes:

- Be able to list the duties assigned to the legislative and executive branches of municipal government
- Identify which duties are the responsibility of the municipal clerk, treasurer, and public works director
- Be able to describe the implications of officials performing duties that are not assigned to their position

**9:00 -
10:50 AM**

Employee Hiring Process

Angela Simonson, MMIA
Stillwater-Boulder

A review of the legal requirements and appropriate procedures to hire new municipal employees

Learning Outcomes:

- Know the legal requirements and effective techniques and methods of recruiting, advertising, selecting, interviewing and hiring a new employee

Prevailing Wage

Mitch Leslie, Montana Department of Labor
Bighorn- Yellowstone

A discussion about the definition, importance, and impact of prevailing wages

Learning Outcomes:

- Be able to recite the definition of prevailing wage.
- Recognize the importance and impact of prevailing wages on a municipality.

**10:50 -
11:05 AM**

Morning Break
Coffee and Hot Tea



**11:05 -
12:00 PM**

Modern Security for Municipal Officers
Bill Toner, Stockman Bank & Britani Laughery, MMIA
Stillwater-Boulder

Cyber Security is a set of principles and practices designed to safeguard your putting assets and online information

Learning Outcomes:

- Be able to Secure your computer and protect the data you are handling. Assess risky behavior online and recognize possible threats. Equip yourself with the knowledge of security guidelines, policies, and procedures

**12:00 -
1:30 PM**

Banquet Lunch
Outside Courtyard
Western Buffet & Dessert Table

Lunch will be enjoyed outside in the courtyard. Please be prepared for the sunshine.

**1:30 -
3:00 PM**

I'm Gonna Sue (Don't Panic)
Alan Hulse, MMIA
Stillwater-Boulder

Learn how to respond to those famous words from our citizens "I'm Going to Sue." Hear from filed experts about typical threats, responses, and best practices when a citizen wants to sue the municipality. In addition, learn what types of behavior and processes are covered under role and scope of professional duty.

Learning Outcomes:

- Know and Understand the importance of remaining calm and how to respond.
- Be able to give the appropriate response.



**3:00 -
5:00 PM**

Building a Strong, Resilient Team
Dan Clark, Director, MSU Local Government Center
Bighorn- Yellowstone

A review and discussion of the importance of a strong, resilient team and effective team building strategies

Learning Outcomes:

- Be able to describe the importance of a strong, resilient team.
- Identify strategies to increase team strength.
- Explain how strong municipal teams lead to improved service delivery to citizens.



CONGRATULATIONS TO OUR GRADUATES



Diane Eagleson	Finance Officer	City of Belgrade
Carol Floren	Clerk/Treasurer	City of Chinook
Amber Foechterle	Clerk/Treasurer	Town of Joliet
Erica Franck	Deputy Clerk	City of Thompson Falls
Kirsten Hands	Deputy Clerk	City of Missoula
Elizabeth McIntosh	Deputy Clerk/Treasurer	City of Havre
Kristi Millhouse	Clerk/Treasurer	Town of Twin Bridges
Jennifer Robley	Clerk/Treasurer	Town of Fort Peck
Lynn Schilling	Clerk/Treasurer	Town of Belt
Kirstin Sweet	Clerk/Treasurer	Town of Bridger
Tara Thoeny	Clerk/Treasurer	Town of Circle
Linda Wilkins	Deputy Clerk	City of Miles City
Angela Zimmer	Deputy Clerk	City of Hardin
Debra Zinda	Clerk/Treasurer	Town of Wibaux