



# Welcome to the

38TH ANNUAL

# MONTANA MUNICIPAL INSTITUTE



## 2018 DAILY AGENDA

### Sunday, May 6<sup>th</sup>

3 - 4:30 pm

Registration

4:30 - 6 pm

Welcome & Orientation

### Monday, May 7<sup>th</sup>

#### CLERK AGENDA

#### TREASURER AGENDA

7 - 8 am

Breakfast

8 - 9 am

#### Ethics in Municipal Government

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

9 - 10 am

#### Admin. Duties of the Municipal Clerk 2

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

#### Financial Terminology

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

10 - 12 pm

#### Developing a Council Orientation Packet

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.

#### Fundamentals of Municipal Budgeting 2

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

12 - 1 pm

Lunch

**1 - 3 pm**

**Stress Management**  
A review and discussion of effective strategies to reduce individual stress in the workplace.

**Year-End Closing**  
A hands on session that illustrates the proper steps for year-end closing entries.

**3 - 4 pm**

**Prep of Minutes 2**  
A detailed review, discussion and practicum dealing with the preparation of legally sufficient minutes of the council meeting.

**Internal Controls**  
A review of the structure of and procedures for establishing internal controls.

**4 - 5 pm**

**Preventing Discrimination and Harassment in the Workplace**  
An overview of unlawful discrimination and harassment in the workplace, including protected classes and other protections, along with prevention strategies for a public organization.

# Tuesday, May 8<sup>th</sup>

## CLERK AGENDA

## TREASURER AGENDA

**7 - 8 am**

**Breakfast**

**8 - 10 am**

**Clerk/ Treasurer to Clerk/ Treasurer**  
An interactive discussion and review of commonly asked questions and challenges faced by municipal clerk and treasurers.

**10 - 12 pm**

**Communicating with Public**  
A review of the techniques of effective communication with the public.

**Municipal Audit**  
A review of the legal requirements for and purposes of the annual municipal audit.

**12 - 1 pm**

**Lunch**

**1 - 2 pm**

**Writing Policies**  
An overview of the essential components of a fair and consistent policy.

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

**2 - 3:30 pm**

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

**Special Districts**  
An in-depth discussion of the fundamentals of creating, assessing, and maintaining special districts.

**3:30 - 5 pm**

**Maintaining Historical Records**  
An overview of the legal requirements and of best record management practices.

**Gas Tax**  
A review of the new Gas Tax legislation, implementation, and resulting changes for municipal governments in Montana.

# Wednesday, May 9<sup>th</sup>

## CLERK AGENDA

## TREASURER AGENDA

7 - 8 am

Breakfast

8 - 9 am

**Recognizing & Avoiding Workplace Violence**  
An in-depth discussion of workplace violence and related communication skills.

9 - 10 am

**Workplace Safety**  
An overview of federal and state laws, along with best practices used, to ensure workplace safety

**Funding Capital Replacement**  
An overview of establishing and funding a municipal capital improvement program (CIP).

10 - 12 pm

**Risk Reduction in Personnel Management 2**  
An intensive review and application of policies and practices to reduce risk exposure in managing municipal employees.

**Payroll Reporting**  
A review of the requirements and best practices of reporting payroll and retirement information to state and federal agencies.

12 - 1 pm

Lunch

1 - 3 pm

**Reasonable Suspicion Testing**  
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.

**Grant Application & Administration**  
A review and discussion of effective grant application procedures including administrative requirements for a successful grant application.

3 - 5 pm

Real Colors

# Thursday, May 10<sup>th</sup>

## CLERK AGENDA

## TREASURER AGENDA

7 - 8 am

Breakfast

8 - 9 am

**Roles & Responsibilities**  
A review and discussion of the roles and responsibilities of appointed and elected municipal officials.

**9 - 11 am**

**Employee Hiring Process**

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

**Prevailing Wage**

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

**11 - 12 pm**

**Cyber Security**

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

**12 - 1:30 pm**

**Banquet Lunch**

**1:30 - 3 pm**

**I'm Gonna Sue (Don't Panic)**

Learning how to respond to those famous words from our citizens "I'm Going to Sue"

**3 - 5 pm**

**Building a Strong, Resilient Team**

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