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# 39TH ANNUAL MONTANA MUNICIPAL INSTITUTE

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**Clerks, Treasurers,  
& Finance Officers**

**May 5-9, 2019**

**Bozeman, MT**



# THANK YOU TO OUR SPONSORS

## PLATINUM



## GOLD



## SILVER



WRITE IT DOWN SO YOU DON'T FORGET!

Conference center wifi password:

Extension online

Username:

Password:

# Sunday, May 5<sup>th</sup>

**2:30 -  
4:00 PM**

**Registration**  
Foyer

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

**Welcome & Orientation - Wine and Cheese Reception**  
Hyalite & Clark

**5:00 -  
5:30 PM**

**Clerks Appreciation - 50th Anniversary**

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

### CLERK AGENDA

### TREASURER AGENDA

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

**Breakfast- Spanish Peaks**  
Atrium

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

#### Committees That Work

Dan Clark, MSU Local Government Center

Hyalite & Clark

Committees make up a large portion of municipal government operations. It is important for municipal officials to understand the principles and best practices of successful, productive committees.

#### Learning Outcomes:

- Be able to identify the principles and frameworks of successful committees.
- Recognize the importance of productive teams to the daily operations and governance of municipalities.

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

#### Municipal Permits

Elizabeth Roos, Clerk  
Town of West Yellowstone

Hyalite & Clark

The purpose of the course is to understand the requirements, best practices and common questions related to municipal permits.

#### Learning Outcomes:

- Be able to identify state and local permit requirements.
- Be able to recognize municipal permitting best practices.

#### Annual Financial Report

Jodi Roger, Finance Officer  
City of Choteau

Tracy Rebo, Clerk/Treasurer  
City of Troy

Madison & Lewis

The purpose of this course is to review the legal requirements and preparation of the Annual Financial Report.

#### Learning Outcomes:

- Be able to apply standard year and closeout procedures.

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

**Morning Break**  
Coffee and Hot Tea



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

**Managing Change**  
Dan Clark, MSU LGC  
**Hyalite & Clark**

An interactive session focused on employing strategies to identify and remove obstacles to change and learning how to handle and transition and adapt.

Learning Outcomes:

- Understand internal and external resistance to change.
- Understand how to clearly communicate the process.
- Be able to create buy-in to the change.
- Be able to involve co-workers in the change process.

**Turning Delinquent Receivables into Revenue**  
Nikki Brummond, Clerk/Treasurer  
City of Lewistown  
**Madison & Lewis**

A session on strategies and best practices to convert delinquent receivables into revenue for the municipality.

Learning Outcomes:

- Understand the importance of converting all possible delinquent receivables into revenue for long-term financial health.
- Be able to identify best practices related to delinquent receivables.

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

**Lunch- Italian Turkey & Bacon Wrap**  
**Atrium**

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

**Municipal Services**  
Ted Barkley, City Manager, City of Belgrade  
**Hyalite & Clark**

An overview of municipal service functions and operations.

- Know the service functions of municipal government, how they are delivered and which services are essential.
- Understand the role of committees and boards.
- Understand contracted services, public v private.
- Know the role of the municipal clerk & when & how to provide assistance to the mayor & council.
- Know document recording requirements at the county clerk and recorder's office.

**2:10 -  
3:00 PM**

**Freedom of Information Act**  
Mike Meloy, Montana FOI  
**Hyalite & Clark**

An in-depth review of the Freedom of Information Act and the constitutional rights of the public to access information related to the workings of their government.

Learning Outcomes:

- Know the constitutional and statutory requirements of public access to public records.
- Understand the citizen's 'right of privacy'.

**Municipal Debt Management**  
Melissa Kinzler, Finance Officer  
City of Great Falls  
**Madison & Lewis**

A review of the legal limits of municipal debt and the requirements and procedures for issuing general obligation bonds.

Learning Outcomes:

- Know general obligation bond debt limits.
- Be able to identify bonding requirements and procedures.

**2:00 -  
3:15 PM**

**Afternoon Snack**  
Build Your Own Parfait

**3:15 -  
5:00 PM**

**Retirement System & Reporting/ERIC Tips**

Jenny Weigand, MPERA

**Hyalite & Clark**

A review and discussion of payroll preparations and reporting requirements and procedures.

Learning Outcomes:

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

**6:00 PM**

**Sponsored Dinner**  
Please RSVP online  
**Santa Fe Red's**



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

## CLERK AGENDA

## TREASURER AGENDA

**6:30 -  
7:00 AM**

**Rise and Shine Yoga with Kecia**  
**Aspen**

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

**Breakfast- The Yogo**  
**Atrium**



**Social Media as an Outreach Tool**

Aimee Brunckhorst, Clerk  
City of Kalispell  
**Hyalite**

This course will provide an overview of opportunities and best practices for using social media to reach your audience where they are.

Learning Outcomes:

- Know ways to mitigate risks associated with using social media as a tool for your city or town.
- Understand ways to garner support and content among city leadership.
- Be able to begin or strengthen your city or town's social media presence.

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

**USDA Annual Reporting Requirements**

Steven Trundle, USDA  
**Lewis & Clark**

A session on the USDA funding including administrative requirements for successful annual reporting.

Learning Outcomes:

- Know and understand the USDA annual reporting requirements.
- Be able to complete the required USDA annual reports.

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

**Morning Break**  
Coffee and Hot Tea

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

**Revenue Collections**

Anthony Francisco, APT US&C

**Hyalite & Clark**

**A review and discussion of appropriate revenue collection procedures and techniques.**

Learning Outcomes:

- Know revenue collection techniques.
- Understand the importance of developing and establishing effective revenue collection procedures.

**12:00 -  
12:45 PM**

**Lunch- The Outfitter**

**Atrium**

**12:50 -  
2:50 PM**

**Cash Management Handling**

Anthony Francisco, APT US&C

**Hyalite & Clark**

**This is a combination lecture and small working group session to meet the specific certification requirements of the Municipal Treasurers Association.**

Learning Outcomes:

- Understand the law and principles of cash management and banking in the municipal government setting.
- Understand cash flow reporting,
- Know how to evaluate and use banking services and the related technology.

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

**Afternoon Snack**

Build Your Own Trail Mix

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

**Clerk/Treasurer to Clerk/Treasurer**

Montana Clerks, Treasurers, & Finance Officers

**Hyalite & Lewis & Clark**

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

Learning Outcomes:

- Be able to identify and avoid the most common mistakes clerks/treasurers tend to make.

**6:00 PM**



**Sponsored Dinner**  
Please RSVP online  
**Famous Dave's BBQ**



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

## CLERK AGENDA

## TREASURER AGENDA

7:00 -  
8:00 AM

Breakfast- Big Sky Breakfast  
Atrium

8:00 -  
9:40 AM

### The Right of the Public to Know and Participate

Dan Clark, Director, MSU LGC  
Kelly Lynch, Deputy Director, MLCT  
Hyalite & Clark

An in-depth review of the constitutional right of the public to know and participate in the workings of their municipal government.

#### Learning Outcomes:

- Understand the limitations imposed upon Montana's municipal officials by the right of citizens to participate in governmental decisions by the 'open meetings law' and the citizen's 'rights of privacy'.
- Know the constitutional and statutory requirements of public access to public records.

9:40 - 9:55  
AM

Morning Break & District Group Pictures  
Coffee and Hot Tea

9:55 -  
11:45 AM



### Employee Motivation

Mark Willmarth, Vision West  
Hyalite

A review and discussion of effective employee motivation techniques.

#### Learning Outcomes:

- Know the use of employee motivation techniques.
- Understand the tools and resources to engage employees.

12:00 -  
1:00 PM

Lunch- Soup, Salad, & Wraps  
MMCT & FOA Semi-Annual Meeting  
Aspen & Tamarack

1:05 -  
2:50 PM



### Engaging Employees for Success

Mark Willmarth, Vision West  
Hyalite & Clark

An interactive session to address how to engage employees by identifying and meeting employees motivational needs. Methods to increase employee productivity by clarifying job expectations and providing objective feedback will be practiced.

#### Learning Outcomes:

- Understand the process for increasing employee productivity, job satisfaction and retention.
- Be able to identify and reach out to disengaged employees.
- Be able to implement effective feedback tools.

2:50 -  
3:05 PM

Afternoon Snack  
Afternoon Sweet Break



3:05 -  
5:00 PM

**Interviewing Techniques and Analyzing Applicant Qualifications**

Angela Simonson, MMIA  
Hyalite & Clark

The purpose of this course is to review the legal requirements and appropriate procedures to hire municipal employees and an overview of EEO requirements.

Learning Outcomes:

- Understand state and federal laws pertaining to the hiring process.
- Understand protected classes in Montana.
- Understand hiring preferences and how to apply them.
- Understand steps involved in the hiring process.
- Understand best practices to limit risk in the hiring process.

6:00 PM



**Sponsored User Presentation & Dinner**

Please RSVP to: [Kimn@blackmountainsoftware.com](mailto:Kimn@blackmountainsoftware.com)

Hyalite

Buffet Dinner at Best Western GranTree Inn

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

## CLERK AGENDA

## TREASURER AGENDA

6:30 -  
7:00 AM

Rise and Shine Yoga with Kecia  
Aspen

7:00 -  
8:00 AM

Breakfast- The Old Faithful  
Atrium

8:00 -  
8:55 AM



**Succession Planning**

Dan Clark, Director, MSU LGC  
Hyalite & Lewis & Clark

An overview of the importance of succession planning to a municipality's long term health, along with tips, best practices, and first step ideas that clerks can implement as soon as they return home.

Learning Outcomes:

- Be able to identify the importance of clear, consistent succession planning for organizational health.
- Be able to implement succession planning in a department of municipal organization.

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

### How You Impact Change at the State Level

Tim Burton, Executive Director, MLCT

Kelly Lynch, Deputy Director, MLCT

**Hyalite & Lewis & Clark**

A review and discussion of the 2019 Montana Legislative Session and the important role of municipal clerks in helping the League build relationships, identify problems, and develop the power to change the decisions that impact cities and towns.

#### Learning Outcomes:

- Be able to identify the results of the 2019 Legislative Session that will impact municipalities in Montana.
- Be able to recognize the importance of each municipality's involvement in the state legislative process.

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

### Morning Break & District Group Pictures

Coffee and Hot Tea

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

### Overview of Labor Laws

Angela Simonson, MMIA

**Hyalite & Lewis & Clark**

The purpose of this session is to review current labor laws including Fair Labor Standards Act (FLSA), Wrongful Discharge from Employment Act (WDEA), and the American Disabilities Act (ADA).

#### Learning Outcomes:

- Know how laws and policies align.
- Understand the importance of following employment laws and consequences for failing to follow them.
- Understand basics of proper classification for non-exempt and exempt positions.
- Understand the employer's duty to engage in the interactive process under ADA.
- Understand elements of a wrongful discharge from employment.

### Municipal Budgeting

Montana Local Government Services

**Tamarack & Aspen**

This session will review municipal budgeting theory and best practices. Participants will learn about the importance of values-based budgeting, fundamental public accounting theory, and participate in an interactive discussion around practical tips and suggested budgeting processes.

#### Learning Outcomes:

- Identify best practices of municipal budgeting.
- Recognize the importance of sound public accounting theory.
- Employ the knowledge gained to successfully submit an annual budget.

**12:00 -  
2:00 PM**

### Lunch- A Taste of Italy

**Atrium**

**Graduation &**

**Awards Banquet**



**2:00 -  
3:50 PM**

### **Inter-generational Communication and Management**

Tara Mastel, Associate Specialist, MSU LGC

**Hyalite & Lewis & Clark**

An overview of generational differences, their potential impact in the workplace, and techniques for communicating and managing across generations.

Learning Outcomes:

- Understand the historical factors that shaped American generations and how it impacts how individuals are motivated and managed.
- Understand generational differences with regards to communications, slang, dress, attitude, work habits, and courtesy.
- Be able to apply this knowledge of generations to employee motivation and management techniques.



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

### **Operating Under Emergency Conditions**

Jason Rittal, Deputy Director, MACo

**Hyalite & Lewis & Clark**

A session to aid in the planning, communications and records management related to disaster and emergency operating conditions.

Learning Outcomes:

- Know emergency management roles and responsibilities within the requirement of the Montana Code Annotated and the municipal emergency response plan.
- Know what resources are available for records management and back-up systems for record-keeping.
- Be able to develop and implement an emergency records management system for continued local government operations.

### **GASB Review and Update**

Montana Local Government Services

**Tamarack & Aspen**

A review of the changes imposed by the Governmental Accounting Standards Bureau (GASB) and what to expect for FY 2020.

Learning Outcomes:

- Be able to apply the accounting requirements of the GASB



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# CONGRATULATIONS TO OUR GRADUATES

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|------------------------|------------------------------|-----------------------------|
| <b>Tammy Comer</b>     | <b>Clerk/Treasurer</b>       | <b>Town of Fairfield</b>    |
| <b>Darcy Dea</b>       | <b>Deputy Clerk</b>          | <b>City of Great Falls</b>  |
| <b>Sandy Donley</b>    | <b>Utility Clerk/Cashier</b> | <b>City of Forsyth</b>      |
| <b>Summer Fellows</b>  | <b>Clerk/Treasurer</b>       | <b>Town of Whitehall</b>    |
| <b>Carol Floren</b>    | <b>Clerk/Treasurer</b>       | <b>City of Chinook</b>      |
| <b>Mary Leishman</b>   | <b>Clerk/Treasurer</b>       | <b>Town of St. Ignatius</b> |
| <b>Janell Matovich</b> | <b>Clerk/Treasurer</b>       | <b>Town of Grass Range</b>  |
| <b>Audray McCollum</b> | <b>Clerk/Treasurer</b>       | <b>City of Libby</b>        |
| <b>Crystal Turner</b>  | <b>Clerk</b>                 | <b>City of Three Forks</b>  |

