

42nd Annual
M o n t a n a
M u n i c i p a l
I n s t i t u t e

Clerks, Treasurers, &
Finance Officers Program

May 1-5, 2022

Thank you to our sponsors!

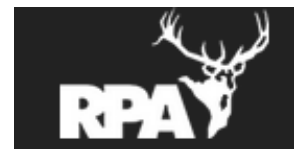
Platinum



Gold



Silver



ENGINEERING, REIMAGINED



Write it down so you don't Forget!

Conference center wifi password:

Extension online

Username:

Password:

Sunday, May 1st

9:00 AM -
3:30 PM

Athenian Dialogue- The Happiness Advantage
Tamarack

3:00 -
4:30 PM

Registration
Foyer

4:30 -
6:00 PM

Welcome & Orientation - Wine Reception
(Please note the hotel is strictly enforcing the no outside alcohol policy)

Monday, May 2nd

Clerk Agenda

Treasurer Agenda

7:00 -
8:00 AM

Breakfast- Saddle Peak
Atrium

8:00 -
8:50 AM

Principles of Good Governance
Dan Clark, MSU Local Government Center
Hyalite & Clark
Foundational principles of good governance ensure the public process is fair, inclusive, and serving the best interest of the entire community. This session will explore these principles and how they are applied in everyday municipal government situations.

Learning Outcomes:

- Identify the principles of good governance.
- Articulate the value and importance of consistent application of principles of good governance for healthy governance and productive public processes.

9:00 -
10:00 AM

Managing and Mastering Payroll
Tom Frownfelder, Deputy Clerk, City of Choteau
Liz McIntosh, Deputy Clerk/Treasurer, City of Havre
Hyalite & Clark
A review of best practices related to processing recurring payroll and reporting appropriate payroll information to the correct state and federal agencies for compliance.

Learning Outcomes:

- Identify the information necessary to process payroll.
- Recognize which payroll information must be reports to state and federal agencies.
- Implement best practices to your municipal payroll process.

10:00 -
10:15 AM

Morning Break
Coffee and Hot Tea

10:15 - 12:00
PM

Engaging with Your Community Through Social Media

Aimee Brunckhorst, City Clerk, City of Kalispell
Chris Hindoien, Mayor, City of Choteau
Hyalite & Clark

An exploration of the risks and benefits of using social media as a communication tool for local governments. Learn about the top “do’s and don’ts” of social media usage from experience professionals.

Learning Outcomes:

- Identify the value and risks associated with municipal social media accounts.
- Describe the benefits and risks of social media use to your municipal elected officials.
- Analyze the fit of social media presence with your current municipal operations.

PERS & ERIC Reporting
Montana Public Employees Retirement Administration (MPERA)
Madison

An overview of best practices of reporting retirement information to state and federal agencies.

Learning Outcomes:

- Identify and submit the required information to state and federal agencies.
- Understand the processes necessary to accurately report required information to the state.

12:00 - 1:00
PM

Lunch- Sandwich buffet
Atrium

1:00 -
3:00 PM

How Do I ?

Experienced municipal clerks, treasurers, & finance officers, Local Government Services Bureau, Montana Municipal Interlocal Authority, Local Government Center
Hyalite/Clark/Lewis

The pandemic has limited our ability to learn from peers, mentor newcomers to the municipal administration community, and connect with agencies that provide support for common issues facing local governments. This highly interactive session will allow participants to bring their most pressing questions about budgets, annual financial reports, audits, PERS & ERIC reporting employment policies, governance, and much more and get small group or one-on-one advice from knowledge area experts.

Topics represented will include:

General financial management, Annual Financial Reports, basics of budgeting, cash reconciliation, claims, audit findings and corrective action plans, BARS chart of accounts, year-end closing procedures, PERS & ERIC, human resource policies, council rules of procedure, council packets, and more!

Learning Outcomes:

- Identify the resources available to help answer common questions.
- Evaluate options to solve current problems facing your community or role.
- Identify answers to your most pressing questions by the end of the session.

3:00 -
3:15 PM

Afternoon Break
Mid-Afternoon Pickup

3:15 -
5:00 PM

How Do I ? (Continued)
Hyalite/Clark/Lewis
Continuation of the interactive assistance workshop.

Learning Outcomes:

- Identify the resources available to help answer common questions.
- Evaluate options to solve current problems facing your community or role.
- Identify answers to your most pressing questions by the end of the session.

6:00 PM

BMS Sponsored User Training & Dinner

Please RSVP at <https://support.blackmountainsoftware.com/login.cfm?tc=1959&CFID=2483249&CFTOKEN=a4ec1f8d4b1e7245-31691228-9837-8648-A9848649F33FA200>



Small Ballroom
Best Western GranTree Inn

Tuesday, May 3rd

Clerk Agenda

Treasurer Agenda

7:00 -
8:00 AM

Breakfast- The Yogo
Atrium

8:00 -
9:50 AM

Real Colors
Ashley Kent, Associate Director, MSU Local Government Center
Hyalite & Clark
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 participants temperament style and corresponding values and communication style preferences
- Understand how temperament styles interact
- Assess temperament styles of diverse stakeholders
- Describe how temperament style understanding can increase positive communication between municipal officials and with the public.

9:50 - 10:05
AM

Morning Break
Coffee and Hot Tea

10:05 -
12:00 PM

Lead, Copper, Public Water & More!

Greg Montgomery, Scott Patterson, George Williams, MT DEQ Public Water Supply Bureau
Hyalite & Clark

Clean and safe drinking water is vital to a healthy community. This session will cover the Lead and Copper rule, Lead in School rule, public water consumer confidence reports, and more.

Learning Outcomes:

- Understand the requirements and responsibilities of the municipality related to each rule.
- Implement a process to ensure compliance with state and federal regulations.

12:00 - 1:00
PM



Sponsored Lunch- Soup & Salad Bar
Atrium



1:00 - 2:50
PM

Effective Public Communication

Mark Willmarth, Vision West
Hyalite & Lewis & Clark

This joint session with elected officials will review techniques and best practices for effectively communicating with the public and building sustainable public trust.

Learning Outcomes:

- Identify the importance of clear, consistent communication with the public.
- Describe the risk of poor or inconsistent public communication.

2:50 -
3:05 PM

Afternoon Break
Build Your Own Parfait

3:05 -
5:00 PM

Future's Game

Dan Clark and Ashley Kent, MSU Local Government Center
Hyalite & Lewis & Clark

An interactive game that explores how regional and local decisions can shape long-term economic, environmental, and community well being.

Learning Outcomes:

- Evaluate how disparate decisions impact the long-term health and vitality of a community.

6:00 PM

Sponsored Dinner
Fiesta Mexicana



Wednesday, May 4th

Clerk Agenda

Treasurer Agenda

7:00 -
8:00 AM

Breakfast- Old Faithful
Atrium

8:00 -
9:50 AM

Senate Bill 302 (L2019), Audit Findings and Corrective Action Plans

Darla Erickson, Local Government Services Bureau

Hyalite & Clark

Recent legislation has changed the way the State of Montana Department of Administration and Local Governments address repeat audit findings and late financial reporting. This session will highlight the new legislation and the changes it has implemented in how LGSB addresses significant findings and corrective action plans.

Learning Outcomes:

- Understand how the changes to audit findings and corrective action plans affects municipalities.
- Know the recommended best practices to avoid or reduce significant audit findings.

9:50 -
10:05 AM

Morning Break & District Group Pictures

Coffee and Hot Tea

10:05 -
12:00 PM

Excellence and Vitality in Rural Communities

Megan Laudenschlager, Executive Director, Strengthen North Dakota

Hyalite & Clark

This keynote presentation will explore the values, assets, and unique qualities that make rural communities such great places to live and work. Megan will share strategies to promote rural community vitality and a discussion about the role of municipal government.

Learning Outcomes:

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

12:00 - 1:00
PM

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

Atrium

1:00 -
2:50 PM

Constructive Conversations

Ashley Kent, MSU Local Government Center

Aspen

Municipal officials often face the need to engage in difficult conversations. This session will explore how to have productive conversations without compromising the relationship.

Learning Outcomes:

- Understand how to utilize the workshop tools to produce constructive conversations.

GASB Updates

Darla Erickson, Local Government Services Bureau

Hyalite & Clark

A review of the recent updates implemented by the Governmental Accounting Standards Bureau (GASB).

Learning Outcomes: .

- Understand how recent GASB updates will change financial reporting requirements.

2:50 -
3:05 PM

Afternoon Break
Sweet & Salty

3:05 -
5:00 PM

Risk Reduction in Personnel Management
 Derrek Shepherd, HR Consultant, MMIA
Hyalite & Clark

A 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 managing employees.
- Know the risk exposures arising from improper HR management practices.

Montana League of Cities & Towns Update
 Kelly A. Lynch, JD, AICP Executive Director, MLCT
Aspen

A review and discussion of recent and upcoming state and federal regulation changes and how they impact Montana municipal government

Learning Outcomes:

- Recognize how recent changes in regulation impact municipal operations

Avoid the Worst Day of Your Work Life: Shore up Your Municipality's Cyber Security
 Britani Laughery, Operations Manager, MMIA
Aspen

An overview of principles and recommended best practices to safeguard municipal digital assets and data against cyber threats.

Learning Outcomes:

- Recognize how to reduce cyber security risks
- Implement procedures and practices to reduce risk in your office

6:00 PM

Dinner on your own
 We invite you to find a group and discover some of the great dinner offerings in Bozeman!
 If you would like suggestions just ask a member of the MSU Local Government Center team

Thursday, May 5th

Clerk Agenda

Treasurer Agenda

7:00 -
8:00 AM

Breakfast- Spanish Peaks
Atrium

8:00 -
8:55 AM

Coverage Changes Affecting Libraries and Library Boards

Alan Hulse, CEO, MMIA

Hyalite & Clark

Learn about the various types of public library formations and how that formation impacts coverage in liability, workers' compensation, and employee benefits programs.

Learning Outcomes:

- Understand what cities/towns and libraries need to do to meet MMIA's underwriting criteria.

9:00 -
9:50 AM

Municipal Finance Solutions

Alan Hulse, CEO, MMIA

Kelly A. Lynch, JD, AICP Executive Director, MLCT

Hyalite & Clark

A discussion about efforts underway to support communities in maintaining continuity among financial tracking and reporting requirements.

Learning Outcomes:

- Recognize the magnitude of the problem across the state.
- Identify your city/town specific needs.

9:50 - 10:05
AM

Morning Break & District Group Pictures

Coffee and Hot Tea

10:05 - 12:00
PM

Clerk/Treasurer to Clerk/Treasurer

Montana Clerks, Treasurers, & Finance Officers

Hyalite & Clark

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.
- Implement new best practices based on most recent information

12:00 - 1:00
PM

Lunch- A Taste of Italy

Yellowstone

Graduation & Awards Banquet

1:00 -
2:00 PM

Transparency is Key: The Public's Right to Know and Participate

MSU Local Government Center

Hyalite & Clark

A review of Montana's constitutional rights of the public to know and participate in the workings of their municipal governments, and how those rights guide operations of the city or town.

Learning Outcomes:

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

2:00 -
2:15 PM

Afternoon Break
Fruit, Vegetables, and Assorted Dips

2:15 -
4:00 PM

The House That Rob Built
MSU Local Government Center

Hyalite & Clark

This final workshop will include a screening of the inspiring film *The House That Rob Built* about Rob Selvig, head coach of the University of Montana Lady Griz basketball team for 40 years and the culture of inclusion and empowerment he created that allowed his players to thrive long after they left the court. Participants will then debrief the themes from the film and how they pertain to the role of a municipal clerk, treasurer, or finance officer in creating an environment where citizens and colleagues can thrive and realize their full potential.

Learning Outcomes:

- Identify the key elements of Coach Selvig's transformational leadership style.
- Describe how those elements can be implemented in your municipal office.
- Implement leadership best practices to improve the positive culture in your municipality.