Oklahoma Municipal Clerks & Treasurers INSTITUTE 2020
March 9-13, 2020 (Monday-Friday)
Wes Watkins Center – Stillwater, Oklahoma
Oklahoma State University

The Oklahoma Municipal Clerks and Treasurers Institute is an educational program designed to develop technical skills and administrative, financial and leadership abilities.

Endorsed by
- Oklahoma Municipal Clerks, Treasurers, and Finance Officials Association
- Oklahoma Association of Public Treasurers of the United States & Canada
- Government Finance Officers Association of Oklahoma
- Oklahoma Municipal League
- International Institute of Municipal Clerks
- Association of Public Treasurers of the United States & Canada

The Oklahoma Municipal Clerks and Treasurers Education Committee

Lynsey Turlington | Institute Director and Program Coordinator, Center for Executive and Professional Development, OSU
Brenda Hall | City of Norman
Jan Neufeld | City of Altus
Lindsey Grigg | City of El Reno
Sarah Sharp | City of Claremore
Ashley VanDeburgh | City of Weatherford
Kelly Danner | Oklahoma Municipal Alliance, Oklahoma City

Center for Executive and Professional Development
Spears School of Business | Oklahoma State University
P 405-744-5208
F 405-744-6143 | W cepd.okstate.edu
294 Business Building
Stillwater, OK 74078-4011
# AGENDA

## MONDAY  MARCH 9

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
</table>
| 8:00-11:00 a.m. | Conflict Management  
Dr. Bryan Edwards, Joe Synar Chair and Associate Professor, Department of Management, Spears School of Business, Oklahoma State University |
| 11:00 a.m.-12:00 p.m. | Lunch (on your own) |
| 12:00-3:00 p.m. | Persuasive Communication  
James Stapp, Lecturer, Department of Management, Spears School of Business, Oklahoma State University |
| 3:00-5:00 p.m. | Citizens, Neighbors & Special Interest Groups  
Cristy Morrison, President and CEO, Visit Stillwater, Stillwater, OK |

## BREAKS

- 10:00-10:20 a.m.
- 2:00-2:20 p.m.
- 4:00-4:10 p.m.

## TUESDAY  MARCH 10

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
</table>
| 8:00 a.m.-12:00 p.m. | Records Management, Meetings and Agendas  
David Weatherford, City Attorney, City of Sand Springs, Town of Mannford, and Town of Mounds, OK |
| 12:00-1:00 p.m. | Lunch (on your own) |
| 1:00-3:00 p.m. | Financial Reporting to City Officials  
Marcy Twyman, CPA, Crawford & Associates, P.C., Oklahoma City, OK |
| 3:00-5:00 p.m. | Written Policies & Procedures  
Pam Spinks, Past Director of Professional Development, OMAG |

## BREAKS

- 9:00-9:10 a.m.
- 11:00-11:10 a.m.
- 2:00-2:10 p.m.
- 4:00-4:10 p.m.

## WEDNESDAY  MARCH 11

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
</table>
| 8:00 a.m.-12:00 p.m. | Social Media from a Legal Standpoint  
Matt Love, Deputy General Counsel & Director of Claims, OMAG |
| 12:00-1:00 p.m. | Lunch (on your own) |
| 1:00-5:00 p.m. | Basic Fiscal Management  
Rachel Domnick, Instructor of Professional Practice, School of Accounting, Spears School of Business, Oklahoma State University |

## BREAKS

- 9:00-9:10 a.m.
- 11:00-11:10 a.m.
- 2:00-2:10 p.m.
- 4:00-4:10 p.m.
AGENDA cont.

THURSDAY  MARCH 12

8:00-11:00 a.m.  State Laws & Regulations/FLSA, Fringe Benefits  
Cristy Luper, Human Resources Director, City of Stillwater, Stillwater, OK
11:00 a.m.-12:00 p.m.  Graduation Luncheon
12:00-2:00 p.m.  GASB Update  
Chris Pembrook, Shareholder, Crawford & Associates, P.C., Oklahoma City, OK
2:00-5:00 p.m.  Public Budgeting Based on Economic Forecasting  
Kevin Webb, Director, Piper Sandler, Las Vegas, NV

FRIDAY  MARCH 13

8:00-9:00 a.m.  Agenda & Minutes  
Bryan Drummond, Attorney, Rosenstein Fist & Ringold, Tulsa, OK
9:00-10:00 a.m.  Customer Service  
Pam Spinks, Past Director of Professional Development, OMAG
10:00 a.m.-12:00 p.m.  Working with Difficult People  
Pam Spinks, Past Director of Professional Development, OMAG
12:00 p.m.  Adjourn

SUMMARY CHECKLIST FOR THE CERTIFIED MUNICIPAL CLERk (CMC):
First, enroll in the Oklahoma Municipal Clerks Institute (OMCI) by turning in your application and one-time fee of $20 to OSU Center for Executive and Professional Development. Next, become a member of the International Institute of Municipal Clerks (IIMC) by completing an Application for Admission and submit it to IIMC with the fee. You must be an IIMC member for two years to receive your CMC. Then, attend the Institute sessions and complete the assessment for each session. It should take approximately 3½ years to complete the education requirements for the CMC. Once you have completed your education and experience requirements, complete an Application for CMC Designation and submit it to IIMC with your supporting documents and the fee. Once you receive notification from IIMC of your CMC accomplishment, you are eligible to enroll into the Oklahoma Municipal Clerks Academy to achieve your Master Municipal Clerk Certification (MMC).

SUMMARY CHECKLIST FOR THE CERTIFIED PUBLIC FINANCE ADMINISTRATOR (CPFA):
First, enroll in the Oklahoma Municipal Treasurers Institute (OMTI) by turning in your application and one-time fee of $20 to OSU Center for Executive and Professional Development. Next, become a member of the Association of Public Treasurers of the United States and Canada (APT US&C) by completing an Application for Admission and submit it to APT US&C with the fee. You must be an APT US&C member for two years to receive your CPFA. Then, attend the Institute sessions and complete the assessment for each session. It should take approximately 3½ years to complete the education requirements for the CPFA. Once you have completed your education and experience requirements, complete an Application for CPFA Designation and submit it to APT US&C with your supporting documents and the fee. Once you receive notification from APT US&C of your CPFA accomplishment, you are eligible to enroll into the Oklahoma Municipal Clerks and Treasurers Academy to achieve your Advanced Certified Public Finance Administrator (ACPFA).

CPE INFORMATION:
Earn the following CPE credit: 22 hours of Personal Development, 9 hours of Finance, 3 hours of Regulatory Ethics-Technical, and 2 hours of Accounting (Governmental) for a total of 36 hours CPE credit.

The Center for Executive and Professional Development, Oklahoma State University, is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.
Because of guarantee requirements for catering, cancellations must be received by March 2, 2020, at 4 p.m. for a refund of fees.

---

### Attendance Policy Endorsed by Education Committee

Full attendance is required to receive credit for Institute sessions. In order to eliminate disruptions to both speakers and participants, each session will only be open for the first ten minutes. Participants wishing to receive credit will be required to sign in at the beginning of each session. Participants arriving after the session is closed can still attend but will not receive credit for the session. Appropriate breaks will be provided to address personal needs or issues that arise while you are in the sessions. If you need to leave a session for an extended period of time, please wait until the next session to return. Speakers will be encouraged to adhere to the published agenda. However, if a session breaks early, the next session will not begin until the published time.

---

### Location, Fees, and Accommodations

The Institute will be held at the Wes Watkins Center. Full registration fee is $375 which includes instruction, materials, refreshments, continental breakfasts and the Thursday Graduation Luncheon. Part-time participation fees are $60 per half-day and does not include the luncheon. There is no parking charge at the Wes Watkins Center. Participants are asked to make their own hotel reservations. Please bring your tax exempt letter if you wish to claim tax exempt status.

### HOTELS

<table>
<thead>
<tr>
<th>HOTEL</th>
<th>PRICE</th>
<th>CONTACT INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Best Western Plus Cimarron Hotel &amp; Suites</td>
<td>$96/night Plus $10 per room for each additional person in room Code: Clerks and Treasurers</td>
<td>405-372-2878</td>
</tr>
<tr>
<td>Fairfield Inn</td>
<td>$81/night Code: Clerks and Treasurers</td>
<td>405-372-6300</td>
</tr>
<tr>
<td>Home 2 Suites by Hilton Stillwater</td>
<td>$94/night Code: Clerks &amp; Treasurers Institute &amp; Academy</td>
<td>405-372-2550</td>
</tr>
</tbody>
</table>

### Cancellation Policy for the Institute

Because of guarantee requirements for catering, cancellations must be received by March 2, 2020, at 4 p.m. for a refund of fees.
REGISTRATION FORM

Oklahoma Municipal Clerks & Treasurers INSTITUTE
March 9-13, 2020 (Monday-Friday)

WAYS to register
Visit us online at: cepd.okstate.edu
Mail this form to: OSU Center for Executive and Professional Development | 294 Business Building | Stillwater, OK 74078
FAX this form to: 405-744-6143

QUESTIONS
Call the OSU Center for Executive and Professional Development at 405-744-5208.

Name

Name for Badge

I have been awarded the designation(s) of:  ☐ CMC  ☐ MMC  ☐ CPFA  ☐ CPFO  ☐ ACPFA (for name badge purposes)

Title

Municipality     [ ] City of     [ ] Town of

Address

City/State/ZIP

Telephone     FAX

E-mail

☐ PLEASE REGISTER ME (Registration fee is $375.)
Registration fee includes instruction, materials, refreshments, continental breakfasts and Thursday’s luncheon.

☐ PART-TIME PARTICIPANT (Registration fee is $60 each half-day.)
Thursday luncheon is not included in part-time participant rates.
Please check the sessions you plan to attend.

Monday: ☐ a.m. ☐ p.m.  Tuesday: ☐ a.m. ☐ p.m.  Wednesday: ☐ a.m. ☐ p.m.  Thursday: ☐ a.m. ☐ p.m.  Friday: ☐ a.m.

☐ LUNCHEON (Luncheon is included in the full-time registration fee.)
Please check if you plan to attend the luncheon. Please list any dietary restrictions:__________________________

☐ Thursday Graduation Luncheon (part-time participants add $20)
I plan to bring _____ guest(s) to the graduation luncheon on March 12. ($20 per guest)

TOTAL REGISTRATION FEE

☐ Enclosed is a check for $______________________ made payable to OKLAHOMA STATE UNIVERSITY.
☐ Bill my municipality $ ______________________ FEI # ______________________
Purchase Order # ______________________

☐ Charge $______________________ to my ☐ MasterCard ☐ Visa ☐ American Express
Card Number:____________________ Expiration Date:____________________
Billing Address :____________________ Billing Zip :___________ CVV Number:_________

Cancellation policy
Because of guarantee requirements for catering, cancellations must be received by March 2, 2020, at 4 p.m. for a refund of fees.