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

The Oklahoma Municipal Clerks and Treasurers Education Committee

**Holly Bergbower** | Institute Director and Program Coordinator, Center for Executive and Professional Development, OSU

**Kelly Danner** | Staff Liaison, Oklahoma Municipal League, Oklahoma City

**Brenda Hall** | City of Norman

**Cora Middleton** | City of McAlester

**Jan Neufeld** | City of Altus

**Bob Ponkilla** | City of Oklahoma City

**Lindsey Grigg** | City of El Reno

**Sarah Sharp** | City of Claremore

**Ashley VanDeburgh** | City of Weatherford

Center for Executive and Professional Development  
Spears School of Business | Oklahoma State University

1-866-678-3933 | P 405-744-5208  
F 405-744-6143 | W cepd.okstate.edu  
294 Business Building  
Stillwater, OK 74078-4011
**MONDAY**  
**FEBRUARY 18**

- **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.

- **8:00 a.m.-12:00 p.m.**
  - **Public Budgeting**
    - Kenny Tsoodle, Assistant Finance Director, City of Oklahoma City, OK
  - **Lunch**

- **12:00-1:00 p.m.**
  - **Strengthening Your Network**
    - Matt Bowler, Ph.D., Associate Professor of Management, Spears School of Business, Oklahoma State University

- **1:00-5:00 p.m.**
  - **Economic Development - Retail**
    - Sara Kaplan, Retail Marketing Coordinator, City of Norman, OK

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**TUESDAY**  
**FEBRUARY 19**

- **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.

- **8:00-10:00 a.m.**
  - **Ethics**
    - Rachel Cox, Instructor of Professional Practice of Accounting, Spears School of Business, Oklahoma State University

- **10:00 a.m.-12:00 p.m.**
  - **Bank Reconciliations**
    - Brenda Wright, Shareholder, Crawford & Associates, P.C.
  - **Lunch**

- **12:00-3:00 p.m.**
  - **Economic Development - Retail**
    - Sara Kaplan, Retail Marketing Coordinator, City of Norman, OK

- **3:00-5:00 p.m.**
  - **Economic Development**
    - TBD

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**WEDNESDAY**  
**FEBRUARY 20**

- **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.

- **8:00-10:00 a.m.**
  - **Drug Testing-State and Federal Laws**
    - Mike Vanderburg, City Attorney, City of Ponca City, OK
  - **Cash Management**
    - Blane Allen, Senior Vice President, BancFirst, Oklahoma City, OK
  - **Lunch**

- **10:00 a.m.-12:00 p.m.**
  - **Liens and Foreclosures**
    - Carla Sharpe, Williams, Box, Porshee and Bullard, P.C.
  - **Statutes & Laws that Pertain to Clerks**
    - TBD
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<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>8:00-11:00 a.m.</td>
<td>Compelling Public Speaking</td>
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<td>Maribeth Kuzmeski, Assistant Professor of</td>
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<td>Professional Practice, Spears</td>
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<td>School of Business, Oklahoma State University</td>
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<td>10:00-12:00 p.m.</td>
<td>Lunch</td>
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<td>11:00 a.m.-12:00 p.m.</td>
<td>Information Technology</td>
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<td>Jim Burkman, Clinical Associate Professor</td>
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<td>of Management Science &amp; Information Systems, Spears School of Business, Oklahoma State University</td>
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<td>3:00-4:00 p.m.</td>
<td>Agenda &amp; Minutes</td>
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<td>Bryan Drummond, Shareholder/Director, Rosenstein, Fist &amp; Ringold</td>
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<td>4:00-5:00 p.m.</td>
<td>Handling Conflict</td>
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<td>Christy Luper, Human Resources Director, City of Stillwater, OK</td>
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**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 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 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 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).
Because of guarantee requirements for catering, cancellations must be received by February 8, 2019 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.

Cancellation Policy for the Institute

Because of guarantee requirements for catering, cancellations must be received by February 8, 2019 at 4 p.m. for a refund of fees.
REGISTRATION FORM

Oklahoma Municipal Clerks & Treasurers INSTITUTE
February 18-22, 2019 (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 or our toll free number at 1-866-678-3933.

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 February 21. ($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 Zip :____________________ Security Code: __________________

Cancellation policy
Because of guarantee requirements for catering, cancellations must be received by February 8, 2019 at 4 p.m. for a refund of fees.

CENTER for EXECUTIVE AND PROFESSIONAL DEVELOPMENT
AT SPEARS BUSINESS SCHOOL OF BUSINESS