

**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

**Tracey Aaron**,  
City of Prague

**Erin Crawford**,  
City of Enid

**Kelly Danner**  
Oklahoma Municipal Alliance

**Lindsey Grigg**,  
City of El Reno

**Brenda Hall**,  
City of Norman

**Lisa Martin**,  
City of Mustang

**Jan Neufeld**,  
City of Altus

**Sarah Sharp**,  
City of Claremore

**Ashley VanDeburgh**,  
City of Weatherford

**Jerrica Worthy**,  
City of Cushing

**Oklahoma Municipal Clerks & Treasurers**

# ACADEMY

January-December 2021

Live, Interactive Virtual Sessions  
Oklahoma State University

The Oklahoma Municipal Clerks and Treasurers Academy is an advanced program designed to develop technical skills and administrative, financial and leadership abilities. Participants should attend the Academy if working towards their Master Municipal Clerk (MMC) or Advanced Certified Public Finance Administrator (ACPFA).

# ACADEMY 2021

## AGENDA

<b>QUARTER 1:</b>	<b>Jan. 21</b>	1:30-4:30 p.m.	<b>Protection from Fraud and Cyber Security</b> Tim Powers, <i>Director of Information Technology, City of Norman</i> Robert Gruver, <i>Network Administrator, City of Norman</i>
	<b>Feb. 9</b>	9 a.m.-12 p.m.	<b>Crisis Management</b> Shimeka Mack, <i>Emergency Management Officer, Oklahoma Department of Emergency Management</i> Chuck Kerns, <i>Training Officer, Oklahoma Department of Emergency Management</i>
	<b>Feb. 16</b>	2-4 p.m.	<b>Communications</b> Annahlyse Meyer, <i>Chief Communications Officer, City of Norman</i>
	<b>March 9</b>	10-11 a.m.	<b>Leveraging the Power of Plain Language</b> Sherry Fletcher, <i>Director of Marketing &amp; Civic Engagement, City of Stillwater</i>
	<b>March 17</b>	10 a.m.-12 p.m.	<b>Cash Flow Forecasting</b> Anthony Francisco, <i>Director of Finance, City of Norman</i>
	<b>March 18</b>	10 a.m.-12 p.m.	<b>Issuing Municipal Debt Securities</b> Nate Ellis, <i>Attorney, The Public Finance Law Group PLLC</i>
<b>QUARTER 2:</b>	<b>April 8</b>	9 a.m.-12 p.m.	<b>Project Management</b> Dr. Stephanie Royce, <i>Clinical Assistant Professor and Executive Ph.D. Director, OSU Spears School of Business</i>
	<b>April 14</b>	9 a.m.-12 p.m.	<b>Unconscious Bias</b> Dr. Lex Smith Washington, <i>Spears School of Business Senior Inclusion Officer, Associate Professor of Management and William S. Spears Chair of Business Administration, OSU Spears School of Business</i>
	<b>May 20</b>	2-4 p.m.	<b>Working with your Boards and Commissions</b> Brenda Hall, <i>City Clerk, City of Norman</i>
	<b>June 17</b>	10 a.m.-12 p.m.	<b>GASB Update</b> Chris Pembrook, <i>Shareholder, Crawford &amp; Associates, P.C.</i>
<b>QUARTER 3:</b>	<b>July 7</b>	1:30-4:30 p.m.	<b>Office Team Building-Working with Toxic Employees</b> Suzie Paulson, <i>General Counsel, OMAG</i>
	<b>July 14</b>	2-4 p.m.	<b>Building Accountability as a Leader</b> Dr. Pearl Sumathi, <i>Assistant Professor of Practice, Department of Management, OSU Spears School of Business</i>
	<b>Aug. 12</b>	10 a.m.-12 p.m.	<b>Roles of Elected Officials</b> David Weatherford, <i>Attorney, Municipal Consultants LLC</i>
	<b>Aug. 17</b>	10 a.m.-12 p.m.	<b>How to Have a Good Meeting</b> David Weatherford, <i>Attorney, Municipal Consultants LLC</i>
	<b>Sept. 7</b>	10 a.m.-12 p.m.	<b>Pension Funding</b> Katie Girardi, <i>Retirement Plan Administrator, OkMRF</i>
	<b>Sept. 8</b>	10 a.m.-12 p.m.	<b>Your Partner the Oklahoma Tax Commission</b> David Francis, <i>Unit Revenue Manager, Oklahoma Tax Commission</i>

# AGENDA CONT.

<b>QUARTER 4:</b>	<b>Oct. 19</b>	9 a.m.-12 p.m.	<b>Leading Change</b> <i>Dr. Matt Bowler, Director of the MBA Program and Associate Professor of Management, OSU Spears School of Business</i>
	<b>Oct. 21</b>	9 a.m.-12 p.m.	<b>HR Issues: Hiring, Interviewing and Handling Problem Employees</b> <i>Margaret McMorrow-Love, Attorney, Love Law Firm</i>
	<b>Oct. 27</b>	2-4 p.m.	<b>Legislative Issues: Economic and Local Government Trends</b> <i>Daniel McClure, Deputy General Counsel, Oklahoma Municipal League</i>
	<b>Nov. 16</b>	2-4 p.m.	<b>Effective Governance</b> <i>Cheryl Adams, Programs Manager, Oklahoma Municipal League</i>
	<b>Nov. 17</b>	2-4 p.m.	<b>Municipal Investing in a Zero Rate Environment</b> <i>Mike Gilbert, Vice President, Bank of Oklahoma Financial Securities</i>
	<b>Nov. 18</b>	10 a.m.-12 p.m.	<b>Principles of a Good Finance Policy</b> <i>Marcy Twyman, Shareholder, Crawford &amp; Associates, P.C.</i>

SESSIONS	HOURS	MMC AREA	ACPFA AREA
<b>Protection from Fraud and Cyber Security</b>	3	Public Administration	Public Finance Administration
<b>Crisis Management</b>	3	Public Administration	Public Finance Administration
<b>Communications</b>	2	Social and Interpersonal Issues	—
<b>Leveraging the Power of Plain Language</b>	1	Elective	—
<b>Cash Flow Forecasting</b>	2	—	Public Finance Administration
<b>Issuing Municipal Debt Securities</b>	2	—	Public Finance Administration
<b>Project Management</b>	3	Public Administration	Public Finance Administration
<b>Unconscious Bias</b>	3	Social and Interpersonal Issues	Professional Development
<b>Working with your Boards and Commissions</b>	2	Social and Interpersonal Issues	—
<b>GASB Update</b>	2	—	Professional Development
<b>Office Team Building-Working with Toxic Employees</b>	3	Social and Interpersonal Issues	Professional Development
<b>Building Accountability as a Leader</b>	2	Social and Interpersonal Issues	Professional Development
<b>Roles of Elected Officials</b>	2	Public Administration	—
<b>How to Have a Good Meeting</b>	2	Public Administration	—
<b>Pension Funding</b>	2	—	Public Finance Administration
<b>Your Partner the Oklahoma Tax Commission</b>	2	—	Public Finance Administration
<b>Leading Change</b>	3	Social and Interpersonal Issues	Professional Development
<b>HR Issues: Hiring, Interviewing and Handling Problem Employees</b>	3	Public Administration	—
<b>Legislative Issues: Economic and Local Government Trends</b>	2	Public Administration	Public Finance Administration
<b>Effective Governance</b>	2	Social and Interpersonal Issues	—
<b>Municipal Investing in a Zero Rate Environment</b>	2	—	Public Finance Administration
<b>Principles of a Good Finance Policy</b>	2	—	Public Finance Administration



## CHECKLISTS AND POLICIES

### **SUMMARY CHECKLIST FOR THE MASTERS MUNICIPAL CLERK (MMC):**

First, enroll in the Oklahoma Municipal Clerks Academy (OMCA) by turning in your application and one-time fee of \$20 to OSU Center for Executive and Professional Development. Next, complete an Application for Admission with IIMC to let IIMC know that you are enrolling in the MMC program. Review the MMC section of the IIMC Education Guidelines. Then, attend the Academy sessions and complete the assessment for each session. Once you have completed your education and experience requirements, complete an Application for MMC Designation and submit it to the IIMC with your supporting documents and the fee.

### **SUMMARY CHECKLIST FOR THE ADVANCED CERTIFIED PUBLIC FINANCE ADMINISTRATOR (ACPFA):**

First, enroll in the Oklahoma Municipal Treasurers Academy (OMTA) by turning in your application and one-time fee of \$20 to OSU Center for Executive and Professional Development. Next, review the eligibility requirements for the ACPFA designation. Then, attend the Academy sessions and complete the assessment for each session. Once you have completed your education and experience requirements, complete an Application for ACPFA Designation and submit it to the APT US&C with your supporting documents and the fee.

### **ATTENDANCE POLICY ENDORSED BY EDUCATION COMMITTEE**

Full attendance is required to receive credit for Academy sessions. In order to receive credit for each session, participants will be required to sign-in to the virtual sessions with their first and last name. Participants that registered and paid for a virtual session and were unable to attend the live session can receive a recording to watch. An assessment will be required after each session. Participants will be given 3 chances to earn a 70% or higher on the assessment to receive credit for the class.

#### **Cancellation Policy for the Academy**

Cancellations must be received 5 days before the first session of each quarter is set to start. If registering for individual sessions, cancellations must be received 5 days prior to the start of each session.

# REGISTRATION FORM

## Oklahoma Municipal Clerks & Treasurers **ACADEMY**

January-December 2021

### WAYS to register

Visit us online at: [business.okstate.edu/cepd](http://business.okstate.edu/cepd)

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

Title

Municipality

[ ] City of [ ] Town of

Address

City/State/ZIP

Telephone

FAX

E-mail

**Please register me for all four quarters** (Registration fee is \$500.)

**Please register me as a part-time participant**

Please check the session(s) you would like to register for (Registration fee is \$25 per hour) **OR** please check the quarter(s) you would like to register for (Registration fee is \$125 per quarter).

#### **Quarter 1**

- Protection from Fraud and Cyber Security (3 hrs.)
- Crisis Management (3 hrs.)
- Communications (2 hrs.)
- Leveraging the Power of Plain Language (1 hr.)
- Cash Flow Forecasting (2 hrs.)
- Issuing Municipal Debt Securities (2 hrs.)

#### **Quarter 2**

- Project Management (3 hrs.)
- Unconscious Bias (3 hrs.)
- Working with your Boards and Commissions (2 hrs.)
- GASB Update (2 hrs.)

#### **Quarter 3**

- Office Team Building-Working with Toxic Employees (3 hrs.)
- Building Accountability as a Leader (2 hrs.)
- Roles of Elected Officials (2 hrs.)
- How to Have a Good Meeting (2 hrs.)
- Pension Funding (2 hrs.)
- Your Partner the Oklahoma Tax Commission (2 hrs.)

#### **Quarter 4**

- Leading Change (3 hrs.)
- HR Issues: Hiring, Interviewing and Handling Problem Employees (3 hrs.)
- Legislative Issues: Economic and Local Government Trends (2 hrs.)
- Effective Governance (2 hrs.)
- Municipal Investing in a Zero Rate Environment (2 hrs.)
- Principles of a Good Finance Policy (2 hrs.)

### 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

Cancellations must be received 5 days before the first session of each quarter is set to start. If registering for individual sessions, cancellations must be received 5 days prior to the start of each session.



CENTER FOR  
**EXECUTIVE AND  
PROFESSIONAL DEVELOPMENT**  
Spears School of Business