

Oklahoma Municipal Clerks & Treasurers INSTITUTE

January-December 2021

Live, Interactive Virtual Sessions
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. Participants should attend the Institute if working towards their Certified Municipal Clerk (CMC) or Certified Public Finance Administrator (CPFA).

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

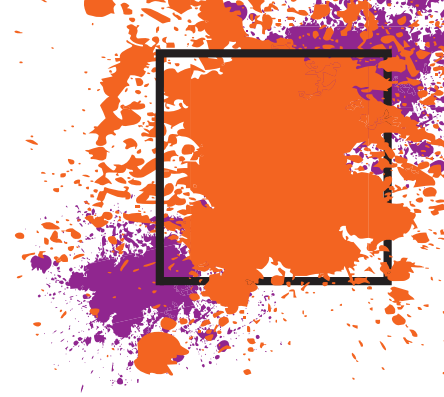
Jan Neufeld,
City of Altus

Sarah Sharp,
City of Claremore

Ashley VanDeburgh,
City of Weatherford

Jerrica Worthy,
City of Cushing

Oklahoma Municipal Clerks & Treasurers INSTITUTE 2021



AGENDA

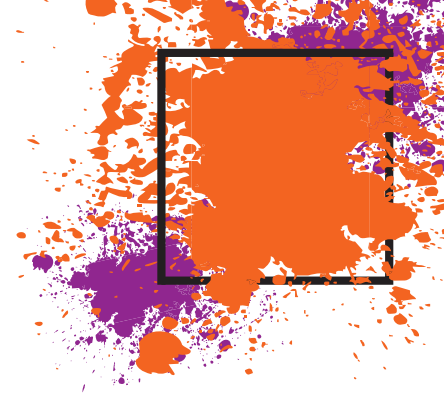
- QUARTER 1:**
- Jan. 13** 10 a.m.-12 p.m. **Intro to Public Administration**
Natalie Evans, *Management Analyst, City of Edmond*
 - Feb. 11** 9 a.m.-12 p.m. **Time Management**
Dr. Mac McCrory, *Adjunct Instructor, Department of Management, OSU Spears School of Business*
 - Feb. 17** 9 a.m.-12 p.m. **Diversity & Inclusion**
Dr. Lex Smith Washington, *Spears School of Business Senior Inclusion Officer, Associate Professor of Management and William S. Spears Chair of Business Administration, OSU Spears School of Business*
 - March 11** 10-11 a.m. **Social Media for City Officials**
Sherry Fletcher, *Director of Marketing & Civic Engagement, City of Stillwater*
 - March 24** 2-4 p.m. **Information Technology**
Ryan Rushing, *Director of Information Technology, City of Midwest City*
- QUARTER 2:**
- April 6** 10 a.m.-12 p.m. **Cyber Security for City Accounts**
Preston Ackerman, *Special Agent, Federal Bureau of Investigation*
 - April 7** 10 a.m.-12 p.m. **Fiscal Management**
Anthony Francisco, *Director of Finance, City of Norman*
 - May 4** 10 a.m.-12 p.m. **Attitude & Initiative: Hire Attitude, Develop Initiative**
Tom Rider, *General Manager, Municipal Electric Systems of Oklahoma*
 - May 6** 10 a.m.-12 p.m. **Accountability at Work**
Kyle Eastham, *Executive-in-Residence, School of Entrepreneurship, OSU Spears School of Business*
 - June 9** 2-4 p.m. **Community Development**
Marshall Vogts, *Director of Community Development, Oklahoma Department of Commerce*
- QUARTER 3:**
- July 8** 2-4 p.m. **Investing Public Funds**
Matt Boggs, *City Treasurer, City of Oklahoma City*
 - July 15** 9 a.m.-12 p.m. **Project Management**
Dr. Stephanie Royce, *Clinical Assistant Professor and Executive Ph.D. Director, OSU Spears School of Business*
 - Aug. 10** 2-3 p.m. **Legislative Update**
Bryan Drummond, *Attorney, Rosenstein Fist and Ringold*
 - Aug. 18** 10 a.m.-12 p.m. **Group Think**
Dr. Matt Bowler, *Director of the MBA Program and Associate Professor of Management, OSU Spears School of Business*
 - Sept. 9** 9 a.m.-12 p.m. **Retirement Plan Basics**
Chris Whatley, *Plan Advisor & Portfolio Strategist, OkMRF*

AGENDA CONT.

QUARTER 4:	Oct. 20	10 a.m.-12 p.m.	Fraud Schemes Chris Pembrook, <i>Shareholder, Crawford & Associates, P.C.</i>
	Oct. 26	2-4 p.m.	Election Administration & Ethics Kelly Danner, <i>Director of Business Development, Oklahoma Municipal Alliance</i>
	Nov. 9	2-4 p.m.	Cash Management & Banking Blane Allen, <i>Senior Vice President, Financial Services, BancFirst</i>
	Nov. 10	10 a.m.-12 p.m.	Municipal Clerk Profession Curtis Green, <i>City Clerk, City of Broken Arrow</i>

SESSIONS	HOURS	CMC AREA	CPFA AREA
Intro to Public Administration	2	Public Administration	Public Finance Administration
Time Management	3	Social and Interpersonal Issues	Professional Development
Diversity & Inclusion	3	Social and Interpersonal Issues	Professional Development
Social Media for City Officials	1	Elective	Professional Development
Information Technology	2	Public Administration	Public Finance Administration
Cyber Security for City Accounts	2	Public Administration	Public Finance Administration
Fiscal Management	2	Public Administration	Public Finance Administration
Attitude & Initiative: Hire Attitude, Develop Initiative	2	Social and Interpersonal Issues	Professional Development
Accountability at Work	2	Social and Interpersonal Issues	Professional Development
Community Development	2	Social and Interpersonal Issues	Professional Development
Investing Public Funds	2	—	Public Finance Administration
Project Management	3	Public Administration	Public Finance Administration
Legislative Update	1	Public Administration	Public Finance Administration
Group Think	2	Social and Interpersonal Issues	Professional Development
Retirement Plan Basics	3	Elective	Professional Development
Fraud Schemes	2	Public Administration	Public Finance Administration
Election Administration & Ethics	2	Elective	—
Cash Management & Banking	2	—	Public Finance Administration
Municipal Clerk Profession	2	Public Administration	—

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CHECKLISTS AND POLICIES

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).

ATTENDANCE POLICY ENDORSED BY EDUCATION COMMITTEE

Full attendance is required to receive credit for Institute 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 Institute

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 **INSTITUTE**

January-December 2021

WAYS to register

Visit us online at: 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 \$400.)

Please register me as a part-time participant

Please check the session(s) you would like to register for (Registration fee is \$20 per hour) **OR** please check the quarter(s) you would like to register for (Registration fee is \$100 per quarter.)

Quarter 1

- Intro to Public Administration (2 hrs.)
- Time Management (3 hrs.)
- Diversity & Inclusion (3 hrs.)
- Social Media for City Officials (1 hr.)
- Information Technology (2 hrs.)

Quarter 2

- Cyber Security for City Accounts (2 hrs.)
- Fiscal Management (2 hrs.)
- Attitude & Initiative: Hire Attitude, Develop Initiative (2 hrs.)
- Accountability at Work (2 hrs.)
- Community Development (2 hrs.)

Quarter 3

- Investing Public Funds (2 hrs.)
- Project Management (3 hrs.)
- Legislative Update (1 hr.)
- Group Think (2 hrs.)
- Retirement Plan Basics (3 hrs.)

Quarter 4

- Fraud Schemes (2 hrs.)
- Election Administration & Ethics (2 hrs.)
- Cash Management & Banking (2 hrs.)
- Municipal Clerk Profession (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: _____

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