



UNIVERSITY of WISCONSIN  
GREEN BAY

# MUNICIPAL CLERKS AND TREASURERS INSTITUTE



*An experience of lasting value*



July 14-19, 2019  
Green Bay, WI



Register at [www.uwgb.edu/govt](http://www.uwgb.edu/govt)

# MUNICIPAL CLERKS AND TREASURERS INSTITUTE

## Benefits of the Institute



**Only the University of Wisconsin-Green Bay has it!**

### Internationally Accredited

The International Institute of Municipal Clerks (IIMC) and the Association of Public Treasurers of the United States and Canada (APT US&C) have set forth guidelines and accredits the UW-Green Bay Institute. It is one of the largest Institutes which offers more specialized training than anyone else in the United States.

### Hands-on Learning

The goal of our classes is to give you the tools that immediately apply to your job. Our coursework focuses on the development of technical skills, administrative knowledge, leadership abilities and financial management. You will engage in exchanges of information, share job-related experiences and examine factors that contribute to successful on-the-job performance. Our courses are designed to combine lecture, discussion and hands-on training.

### Assessment of Learning

Case studies and exercises that test knowledge and understanding are used to assess the mastery of our courses.

### Advanced Curriculum

We offer all eight tracks of our curriculum in a one-week period. This unique structure allows our curriculum to be progressive in nature. As you return each year, your courses and topics will increase in complexity, allowing us to offer advanced topics in the upper-division tracks. UW-Green Bay's Institute is one of the few in the country with this format.

### Networking Opportunities

The Institute creates a multitude of formal and informal opportunities for networking and exchanging of ideas conducive to your professional growth. These contacts are invaluable to you in performing your duties.

## Tuition

<b>Registration Fee:</b>	<b>\$475</b>
<b>After June 14, 2019:</b>	<b>\$525</b>

*Includes five days of educational sessions (33-34 hours of instruction), materials, lunches, breaks, all-conference event and Thursday Banquet.*

### Payment Information

Payment should include registration and guest fees (if applicable). Please make one check payable to **UW-Green Bay - Govt.** (Send to: UW-Green Bay CECE - Govt, 2420 Nicolet Drive, CL 109, Green Bay, WI 54311-7001).

### Cancellation and Refund Policy

On or before June 14, a full refund minus a \$50 processing fee is given. Between June 14-24, a partial refund of \$300 is given. **After June 24, no refunds will be given.** See detailed refund policy at [www.uwgb.edu/govt](http://www.uwgb.edu/govt).

## Accommodations

### Host Hotel: Radisson Hotel & Conference Center

2040 Airport Drive, Green Bay, WI 54313  
920-494-7300

A block of rooms has been reserved at the Radisson Hotel & Conference Center. The rate is \$92/night and includes breakfast. To reserve your room go online to [www.radisson.com/clerkсандtreasurers](http://www.radisson.com/clerkсандtreasurers) or call and mention "UWGB - CTI" when reserving your room. Room reservation deadline is June 23.

*If you would like a roommate, please contact Ericka at 920-465-2662.*

**Please bring your tax-exempt letter if you wish to claim tax-exempt status on your hotel room.**

Register online at  
[www.uwgb.edu/govt](http://www.uwgb.edu/govt)

## Institute Programs: What Should I Do?

The Clerks and Treasurers Institute offers training for the essential duties of the clerk's and treasurer's positions. It introduces innovative ideas to take back to boards, teaches federal and state statutes and offers opportunities to network with professionals for exchanging ideas and support needed for the successful operation of an increasingly complex local government entity. Participants are required to attend Monday through Friday.

**People who have never attended the Institute should choose either:**

- **Municipal Clerks Institute**

This track provides education and training on clerk duties.

- **Municipal Treasurers Institute**

This track provides education for municipal treasurer duties. This program does not provide basic accounting training. You should be able to post journal entries and perform T-account postings.



## Certificates

Earn all of the educational points for the following certificates upon completion of our Institute. We are the only authorized provider in Wisconsin.

- Certified Municipal Clerk (CMC) (through IIMC)
- Wisconsin Certified Municipal Clerk (WCMC) (through WMCA)
- Certified Public Financial Administrator (CPFA) (through APT US&C)
- Certified Municipal Treasurer of Wisconsin (CMTW) (through MTAW)

## Schedule of Events

**Attendance is required at all class sessions.**

### Sunday

**All Institute Registration**  
(6:30-7:30 p.m.)



**First-Year Orientation (7-7:45 p.m.)**

**First-Year Welcome Reception**  
(7:45-8:15 p.m.)

The First-Year Welcome Reception is a fun time that gives new people coming to the Institute a chance to meet their mentor and new classmates.

### Monday

**Registration (7-8 a.m.)**



**Class Sessions (8 a.m.-5 p.m.)**

**Information Session: How to Become a Certified Clerk or Treasurer (5:15-5:45 p.m.)**

Open to all persons who would like information on applying these courses toward certification.

### Tuesday

**Class Sessions (8 a.m.-5 p.m.)**



**Cosmic Bowling (Optional)**

**(Buses leave at 5:30 p.m. and return at 9 p.m.)**

Can't bowl? No worries! Our evening will begin at 6 p.m. with an old-fashioned pizza buffet at the bowling alley. Bowling and games will begin sometime after 6:30 p.m. Families are welcome!

Cost: \$20/person (No children's discount.) Includes transportation, pizza, salad, soda, dessert, bowling, shoes and alley ball.

### Wednesday

**Class Sessions (8 a.m.-5 p.m.)**



**Farmers Market on Broadway**

**(3-8 p.m.)**

Enjoy a fun-filled evening of live music, shopping, food and drinks in a great atmosphere at Wisconsin's second largest farmers market. **Transportation not provided.**

### Thursday

**Class Sessions (8 a.m.-4:30 p.m.)**



**Graduation Banquet and Ceremony**  
(6-8:30 p.m.)

This is one of our proudest moments at the Institute. Don't miss the opportunity to honor our graduates.

### Friday

**Class Sessions (8-11 a.m.)**





# 2019 Curriculum at a Glance

## Clerks Institute

CLERK YEAR 1
All Participants
Elections
Public Records and Open Meetings Law
Town Clerks only
Developing a Budget
Tax Roll Preparation
Tax Collection and Settlement
City and Village Clerks only
Parliamentary Procedure and Minute-Taking
Liquor and Tobacco Licensing
Ordinances, Resolutions and Policies
Plus a variety of choices
CLERK YEAR 2
All Participants
Records Management
Business Writing
Building Good Relations with Your Community and Board
Town Clerks only
Parliamentary Procedure and Minute-Taking
Ordinances, Resolutions and Policies
City and Village Clerks only
Developing a Budget
Tax Roll Preparation
Tax Collection and Settlement
Plus a variety of choices
CLERK YEAR 3
Required
Basic Employment Law
Fraud
Clerk's Role in Emergency Management
Liability of Local Government and Officials
Ethics and Conflicts of Interest
Working with Boards, Commissions and Councils
Technology
Plus a variety of choices
CLERKS COMPLETION
Required
Elections
Parliamentary Procedure and Minute-Taking
Public Records and Open Meetings Law
Liquor and Tobacco Licensing
Plus a variety of choices

## Treasurers Institute

TREASURER YEAR 1
Required
Government Accounting
Government Accounting for Towns
How to Prepare for an Audit
Developing a Budget
Duties and Responsibilities of the Treasurer
Tax Roll Preparation
Tax Collection and Settlement
Ordinances, Resolutions and Policies
Plus a variety of choices
TREASURER YEAR 2
Required
Records Management
Borrowing and Debt Management
Bill It, Will They Pay?
Financial Planning and Levy Limits
State Sales Tax Requirements
Business Writing
Plus a variety of choices
TREASURER YEAR 3
Required
Basic Employment Law
Cash Flow Management
Technology
Fraud
Working with Boards, Commissions and Councils
Ethics and Conflicts of Interest
Liability of Local Government and Officials
Treasurer's Role in Emergency Management
Plus a variety of choices
TREASURERS COMPLETION
Required
Government Accounting
Government Accounting for Towns
Bill It, Will They Pay?
State Sales Tax Requirements
Borrowing and Debt Management
Financial Planning and Levy Limits
Plus a variety of choices