

# 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 and offers more specialized training than anyone else in the U.S.

### Hands-on Learning

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, quizzes and exercises 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.

### 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)

## 100% Online Format

### July 11-15, 2022

The UW-Green Bay online Institute is a series of interactive, live online sessions via Zoom with some courses being held online through self-guided learning.

**Registration Fee: \$499**  
**After June 10, 2022: \$560**

*Includes 32-34 hours of instruction, electronic materials and online software.*

## Online + In-Person Format

### July 11-14: Online (Zoom)

### July 17: Networking Event (Optional)

### July 18: In-Person Classes

The UW-Green Bay online + in-person Institute will deliver four days of live online sessions via Zoom with some courses being held online through self-guided learning, along with an optional in-person networking event and one day of in-person sessions at the Radisson Conference Center in Green Bay.

**Registration Fee: \$569**  
**After June 10, 2022: \$600**

*Includes 32-34 hours of instruction, electronic materials, online software, admission to networking event and lunch.*

### Lodging

Radisson Hotel & Conference Center  
Green Bay  
2040 Airport Drive  
Green Bay, WI 54313  
920-471-4997

\$105 per night for single/double includes hot breakfast for one or two persons.

Dates for Rate: July 17 & 18, 2022

Room Block Code: UWGB Clerks & Treasures

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

### Questions?

Contact Kassie Van Remortel  
920-465-2468 or [vanremok@uwgb.edu](mailto:vanremok@uwgb.edu).

## Payment Information

Pay online with a credit card or check. Checks should be made 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 10, 2022**, a full refund minus a \$50 processing fee will be made.
- **Between June 11-17, 2022**, a partial refund of \$300 will be given.
- **After June 17, 2022**, no refunds given.

See refund policy at [www.uwgb.edu/govt](http://www.uwgb.edu/govt).

**Handouts are electronic and will not be provided to those who cancel.**

## Participation

Participants are required to have their cameras on during these sessions to allow for verified engagement. UW-Green Bay expects that students will limit outside distractions, remain in one location for the duration of the session (no driving/errands), and actively participate in group discussions and activities.

## Attendance

Participants must attend the full program. Participants who miss 25% or more of a course and/or do not complete any associated assessments will not receive credit for the course.

## Institute Programs: What Should I Do?

**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.

## Online Schedule

Attendance is required at all class sessions. Times listed are approximate. Your agenda will have actual class times.

### Sunday

#### First-Year Welcome Reception and Orientation (7-8:30 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

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

#### Information Session: How to Become a Certified Clerk or Treasurer (5:15-6:15 p.m.)

If you plan on becoming a certified clerk or treasurer, it is important to **start planning now**. If you are a Year 3 student, it is particularly important you attend, so you have completed all of the requirements. Open to all.

### Tuesday

#### Class Sessions (8 a.m.-5:15 p.m.)

#### Wine and Rewind (5:20-6:15 p.m.)

Wine and Rewind is a Q&A session to get your questions answered. This lively panel of seasoned clerks and treasurers has been one of our most popular workshops.

### Wednesday

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

#### All Conference Event (5:15-6:30 p.m.)

### Thursday

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

#### Wine and Rewind (5:15-6:15 p.m.)

### Friday (excludes in-person)

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

## In-Person Schedule

### Sunday

#### Registration and Networking Event (5-9 p.m.)

### Monday

#### In-Person Classes (8 a.m.-5 p.m.)



## 2022 Curriculum at a Glance

### Clerks Institute

#### CLERK YEAR 1

##### All

Elections  
Public Records & Open Meeting Law  
Ordinances, Resolutions & Policies  
Making Presentations Less Stressful

##### Town Clerks

Developing a Budget  
Tax Roll Preparation  
Tax Collection & Settlement  
Plus More

##### City and Village Clerks

Liquor & Tobacco Licensing  
Parliamentary Procedure  
Plus More

#### CLERK YEAR 2

##### All

Business Writing  
Records Management  
Electives  
Plus More

##### Town Clerks

Liquor & Tobacco Licensing  
Parliamentary Procedure  
Plus More

##### City and Village Clerks

Developing a Budget  
Tax Roll Preparation  
Tax Collection & Settlement  
Plus More

#### CLERK YEAR 3

##### All

Strategic Planning in the Clerk's Office  
Basic Employment Law  
Fraud  
Clerks Role in Emergency Management  
Liability of Local Government & Officials  
Ethics & Conflicts of Interest  
Working with Boards, Commissions & Councils  
Technology  
Electives  
Plus More

#### CLERKS COMPLETION

Elections  
Strategic Planning in the Clerk's Office  
Public Records & Open Meeting Law  
Parliamentary Procedure  
Liquor & Tobacco Licensing  
Adventures in Leadership  
Electives  
Plus More

### Treasurers Institute

#### TREASURER TRACK 1

Government Accounting  
Cash Accounting for Towns  
How to Prepare for an Audit  
Developing a Budget  
Duties & Responsibilities of the Treasurer  
Tax Roll Preparation  
Tax Collection & Settlement  
Ordinances, Resolutions, Proclamations & Policies  
Electives  
Plus More

#### TREASURER TRACK 2

Borrowing & Debt Management  
Records Management  
Bill it, Will They Pay?  
Financial Planning & Levy Limits  
State Sales Tax Requirements  
Business Writing  
Cash Management  
Electives  
Plus More

#### TREASURER TRACK 3

Basic Employment Law  
Fraud  
Treasurers Role in Emergency Management  
Liability of Local Government & Officials  
Ethics & Conflicts of Interest  
Working with Boards, Commissions & Councils  
Technology  
Cash Flow Management  
Electives  
Plus More

#### TREASURER COMPLETION

Government Accounting  
Cash Accounting for Towns  
Borrowing & Debt Management  
Financial Planning & Levy Limits  
Cash Management  
State Sales Tax Requirements  
Influence without Authority  
Electives  
Plus More

Each track contains 32-34 hours of education. Not all classes listed. As you register, a diverse range of elective classes will be made available to you (too many to list).