



# **MUNICIPAL CLERKS CERTIFICATION INSTITUTE**

## **YEAR I – SERIES 13**

**October 14-18, 2019**

**Ramada Plaza by Wyndham - Albuquerque**

**Total Institute Hours: 36**

### ***-PRELIMINARY PROGRAM-***

#### **Sunday, October 13**

3:30 – 5:30 P.M.

**REGISTRATION and MEET & GREET PERIOD –  
All Participants**

5:30 P.M.

**DINNER – All Participants**

***Following Dinner***

**GET ACQUAINTED PERIOD – All Participants**

#### **Monday, October 14**

7:00 – 7:50 A.M.

**BREAKFAST**

**All Participants attend the following:**

8:00 A.M. – 12:15 P.M.

(2)

#### **COMMUNICATING PERFORMANCE ISSUES/ ASSIGNMENT OF INSTITUTE PAPER (Assessment)**

This session will provide an overview of major concepts and issues faced by supervisors as they attempt to communicate identified performance problems with subordinate employees and peers. It will provide information and skill building to communicate more effectively regarding expectations and to assess successful performance improvement.

*Instructor:*

Dr. Zane Reeves, Professor  
School of Public Administration  
University of New Mexico

10:00 – 10:15 A.M.

**\*TELEPHONE/COFFEE BREAK**

12:15 – 12:55 P.M.

**LUNCHEON – All Participants**

**Monday, October 14** – *continued*

**Year I Participants attend the following:**

1:00 – 3:00 P.M.

(1)

**RESPONSIBILITIES OF THE MUNICIPAL CLERK**

This session will offer an overview of the duties of the municipal clerk, and will provide resource information for the State of New Mexico.

- ▶ History of the Municipal Clerk
- ▶ Statutory Duties
- ▶ Duties Relating to Minutes, Elections, Records, etc.

*Instructors:*

Gayle Jones, MMC, Clerk/Administrator  
Village of Bosque Farms

Renee Cantin, CMC, Clerk-Treasurer  
City of Truth or Consequences

3:00 – 3:15 P.M.

**\*TELEPHONE/COFFEE BREAK**

**Year I Participants attend the following:**

3:15 – 5:15 P.M.

(1)

**LOCAL GOVERNMENT BUDGETING & INTRODUCTION TO GOVERNMENT FINANCE**

The purpose of this session is to outline the budget process, suggested timeline, procedures for preparing the budget, identifying funding sources and their restrictions, and state required financial reporting procedures. It will include an overview of NM statutory requirements and deadlines.

*Instructors:*

Jini Turri, MMC, Administrator  
Village of Cloudcroft

Gayle Jones, MMC, Clerk/Administrator  
Village of Bosque Farms

**Year II & III Participants attend the following:**

1:00 – 5:15 P.M.

(1)

**DEVELOP YOUR LEADERSHIP SKILLS & LEARN HOW TO PUT THEM TO WORK**

Participants will consider and develop concepts and practices designed to enhance their effectiveness as leaders in their workplace and communities.

- ▶ Overview of Effective Leadership – What makes a good leader? Learn to recognize leadership qualities and build upon them.
- ▶ Self-Leadership – Build your own leadership skills to become a more effective leader.
- ▶ Motivation – Learn how to motivate yourself and your team members
- ▶ Communication - Do you communicate effectively? Improve your communication skills.
- ▶ Leading Through Change – Change happens; learn to manage change and embrace it.

*Instructor:*

Renee Barela-Gutierrez, JD, MBA  
505 Training, LLC

*(Former Town of Taos Attorney, Taos County Attorney & HR Director)*

**Monday, October 14** – *continued*

3:00 – 3:15 P.M.

**\*TELEPHONE/COFFEE BREAK**

***-DINNER ON YOUR OWN-***

**Tuesday, October 15**

7:00 – 7:50 A.M.

**BREAKFAST**

**Year I Participants attend the following:**

8:00 – 10:00 A.M.

(1)

**MEETING ADMINISTRATION, MINUTES AND AGENDAS**

This session will assist participants to better understand the role of the Clerk in a governing body meeting of different types, how to create a basic agenda, find out the different formats of agendas, how to write clear and concise meeting minutes, and how to clearly and properly document the meeting events.

*Instructors:*

Gayle Jones, MMC, Clerk/Administrator  
Village of Bosque Farms

Renee Cantin, CMC, Clerk-Treasurer  
City of Truth or Consequences

10:00 – 10:15 A.M.

**\*TELEPHONE/COFFEE BREAK**

**Year I Participants attend the following:**

10:15 A.M. – 12:15 P.M.

(1)

**BASIC LEGAL PRINCIPLES**

The purpose of this session is to acquaint the students with some of the basic legal principles in local government law as well as various vehicles through which government operates. Discussion points will be the origins and hierarchy of laws and ordinances, as well as the effect that judicial decisions have on municipal operations, the difference between statutes and ordinances and the effect and duration of resolutions of a governing body.

- ▶ Clerks & Statutes
- ▶ Types of Ordinances & Resolutions

*Instructor:*

Randy Van Vleck, General Counsel  
New Mexico Municipal League

12:15 – 12:55 P.M.

**LUNCHEON – All Participants**

**Tuesday, October 15** – *continued*

7:00 – 7:50 A.M.

**BREAKFAST**

**Year II & III Participants attend the following:**

8:00 A.M. – 12:15 P.M.

(2)

**LEARN HOW TO BUILD AND MANAGE EFFECTIVE TEAMS**

This session can help you identify characteristics that lead to better teamwork and higher productivity.

- ▶ Leading, Facilitating and Motivating Teams – Teams are necessary in an organization; learn to build effective teams.
- ▶ Enhancing Effectiveness and Performance of Teams – Once you have an effective team, learn to keep it going!
- ▶ Evaluating Team Performance – Teams need to be reviewed to ensure continued progress; learn evaluation techniques.
- ▶ Conflict Management – All teams experience conflict; learn to manage it to keep your team effective.

*Instructor:*

Renee Barela-Gutierrez, JD, MBA

505 Training, LLC

*(Former Town of Taos Attorney, Taos County Attorney & HR Director)*

10:00 – 10:15 A.M.

**\*TELEPHONE/COFFEE BREAK**

12:15 – 12:55 P.M.

**LUNCHEON – All Participants**

**NOTE: The remainder of the program will be set up in general sessions for all participants.**

1:00 – 5:15 P.M.

(2)

**COMMUNICATION PRINCIPLES FOR PROFESSIONAL & PERSONAL EFFECTIVENESS**

This session will provide the relevant variables of communication, group dynamics, conflict resolution, & teambuilding, all within the context of the municipal political environment.

- ▶ How communication is learned
- ▶ What's your approach?
- ▶ Gender differences
- ▶ Are you listening - are you heard?
- ▶ Personality types
- ▶ Building bridges
- ▶ It was a dark & stormy night...

*Instructor:*

Liz Walcher, Ph.D., CPT

Organizational Development Consulting

Albuquerque, NM

3:00 – 3:15 P.M.

**\*TELEPHONE/COFFEE BREAK**

**-DINNER ON YOUR OWN-**

## **Wednesday, October 16**

7:00 – 7:50 A.M.

### **BREAKFAST**

8:00 – 10:00 A.M.

(2)

### **GOVERNMENTAL ETHICS**

This session will introduce the concepts of ethics in the government setting and will focus on “Doing the Right Thing”, how to sort out the issue to determine the right thing, and how to best achieve the goal of the Official while maintaining professional integrity and ethics. Techniques will be offered for balancing legally supportable against “rightness” issues where they can be used for practical application.

*Instructor:*

Randy Van Vleck, General Counsel  
New Mexico Municipal League

10:00 – 10:15 A.M.

### **\*TELEPHONE/COFFEE BREAK**

10:15 A.M. – 12:15 P.M.

(1)

### **TECHNOLOGY & THE CLERK’S OFFICE**

This session will provide an overview of information technologies that can enable a Clerk’s office to maximize communication and productivity of all employees and their workflows. Techniques will be offered for implementing information technology and for enhancing infrastructure and technological practices.

- ▶ Basic Computer Dos & Don’ts
- ▶ Modes of Networking, Infrastructure
- ▶ Telephone, Faxes & Radio Technologies
- ▶ Using a Website to Communicate with Citizens

*Instructor:*

Marty Callahan, CMC, CGCIO  
IT Manager/Deputy Clerk  
Village of Los Lunas

12:15 – 12:55 P.M.

### **LUNCHEON – All Participants**

1:00 – 5:15 P.M.

(1)

### **ELEMENTS OF EFFECTIVE SUPERVISION**

This session will cover major job duties and responsibilities faced by a clerk as supervisor under the direction of Council. Topics include planning, directing, delegating, communicating, disciplining, and teaching which will assist to improve supervisory performance, to encourage confidence in handling employee problems, and to improve performance appraisal.

*Instructor:*

Dr. Zane Reeves, Professor  
School of Public Administration  
University of New Mexico

3:00 – 3:15 P.M.

### **\*TELEPHONE/COFFEE BREAK**

***-DINNER ON YOUR OWN-***

## **Thursday, October 17**

7:00 – 7:50 A.M.

### **BREAKFAST**

8:00 A.M. – 12:15 P.M. (1)

### **BASIC PARLIAMENTARY PROCEDURE**

This session is a basic introduction to parliamentary procedures and will include the principles, the value and the proper use in legislative meetings. It will clearly define parliamentary terms and their purpose as well as to provide instruction to record proceedings of meetings in the official record, the minutes.

*Instructor:*

Randy Van Vleck, General Counsel  
New Mexico Municipal League

10:00 – 10:15 A.M.

### **\*TELEPHONE/COFFEE BREAK**

12:15 – 12:55 P.M.

### **LUNCHEON – All Participants**

1:00 – 3:00 P.M. (1)

### **INTRODUCTION TO RECORDS MANAGEMENT**

This session will provide the statutory responsibility of a clerk's office for records management; techniques and resources will be offered for implementing a records management program or for enhancing an existing program.

*Instructor:*

Lisa Johnston, MMC, Retired Assistant Clerk  
City of Artesia

3:00 – 3:15 P.M.

### **\*TELEPHONE/COFFEE BREAK**

3:15 – 5:15 P.M. (3)

### **LEGISLATIVE PROCESS, SOURCES OF REVENUE, CURRENT MUNICIPAL ISSUES**

This session will provide an overview of the legislative process including the committee structure, progress of a bill through the legislative system and final action by Legislature and Governor; will describe the various sources of municipal revenue that makes up the budget--taxes, fees and other sources; will cover the legislative priorities of NM municipalities, and issues that municipalities face from other sectors of the state.

*Instructors:*

Bill Fulginiti, Executive Director  
New Mexico Municipal League  
  
Regina Romero  
Intergovernmental Relations Director  
New Mexico Municipal League

6:30 – 9:00 P.M.

### **RECEPTION & GRADUATION BANQUET**

*with Master Municipal Clerk Academy Participants*

## **Friday, October 18**

7:00 – 7:50 A.M.

### **BREAKFAST**

8:00 – 11:00 A.M.

(1)

### **OPEN MEETINGS & INSPECTION OF PUBLIC RECORDS**

This session will provide a general overview of the requirements of the NM Inspection of Public Records and Open Meetings Acts and will highlight the Municipal Clerk's responsibilities in helping municipalities meet the requirements of both laws. Participants will learn techniques for handling requests to inspect public records & ensuring Open Meetings Act compliance at meetings of municipal governing bodies.

*Instructor:*

Randy Van Vleck, General Counsel  
New Mexico Municipal League

9:30 – 9:45 A.M.

### **\*TELEPHONE/COFFEE BREAK**

11:00 A.M. – 12:15 P.M.

(3)

### **REVIEW OF INSTITUTE PAPER**

An opportunity to offer constructive feedback on the overall evaluation of the papers' content, structure and quality with emphasis on how or if major concepts from Monday's Communicating Performance Issues Session were incorporated, and will offer a review of suggested techniques to use toward resolution of your conflict situation.

*Instructor:*

Dr. Zane Reeves, Professor  
School of Public Administration  
University of New Mexico

12:15 – 1:00 P.M.

### **LUNCHEON & ADJOURNMENT**

***-INSTITUTE ADJOURNS-***



\*It is requested that all telephone calls be done during Break times to prevent class disturbance.