



**MUNICIPAL CLERKS CERTIFICATION INSTITUTE**  
**YEAR I – SERIES 14**  
**October 23-28, 2022**  
**Embassy Suites - Albuquerque**

**Total Institute Hours: 36**  
**-PROGRAM-**

**Sunday, October 23**

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 24**

7:00 – 7:50 A.M.

**BREAKFAST**

8:00 AM – 8:15 AM (1)

**WELCOME from President Rebecca Martinez**

8:15 AM – 10:00 AM (1)

**CFOA, IIMC AND THE CERTIFIED MUNICIPAL  
CLERK PROGRAM**

The purpose of this session is to introduce the Clerks and Finance Officers Association, the International Institute of Municipal Clerks and the Certified Municipal Clerk program. Students will learn about the requirements for certification, where to find resources and how to begin documenting their education and experience points.

*Instructor:* Lisa C. Johnston, MMC  
NMMCFOA Interim Institute Director

10:00 – 10:15 A.M.

**\*TELEPHONE/COFFEE BREAK**

10:15 – 12:15 PM (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, retired Clerk-Administrator  
Village of Bosque Farms  
Ida Fierro, CMC, Clerk-Administrator  
Town of Bernalillo

12:15 – 12:55 P.M.

**LUNCHEON – All Participants**

**Monday, October 24** – *continued*

1:00 – 3:00 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:* Jamie Wall, CMC, Clerk  
Village of Fort Sumner  
Teri Gray, Treasurer  
Town of Bernalillo

3:00 – 3:15 P.M.

**\*TELEPHONE/COFFEE BREAK**

3:15 – 5:15 P.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  
Alfred Abeita, MMC, Clerk - *Invited*  
City of Gallup  
Dennis Fulfur, CMC, Clerk - *Invited*  
Town of Mountainair

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

**Tuesday, October 25**

7:00 – 7:50 A.M.

**BREAKFAST**

8:00 – 10:00 A.M. (2)

**ETHICS & PUBLIC SERVICE**

This session will introduce the concepts of ethics in the government setting and will contain two parts. Part one will provide an overview of ethical principles for public employees including a review of the duties and limits provided for in the Government Conduct Act. Part two will be an introduction to the unique ethical challenges surrounding Elections, IPRA, Records Retention, and working with elected officials.

*Instructor:* Randy Autio, Attorney  
New Mexico Local Government Law, LLC

10:00 – 10:15 A.M.

**\*TELEPHONE/COFFEE BREAK**

**Tuesday, October 25** – *continued*

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 and the legal framework governing the duties and responsibilities of a Municipal Clerk.

- ▶ What is the Law?
- ▶ Common Law v. Code
- ▶ The layers of regulation:
  - Federal Law
  - State Law
  - Local Law
- ▶ Employment, Procurement, and Open Government

*Instructor:* Randy Autio, Attorney  
New Mexico Local Government Law, LLC

12:15 – 12:55 P.M.

**LUNCHEON – All Participants**

1:00 – 5:15 P.M. (2)

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

More information to follow

*Instructor:* TBD

3:00 – 3:15 P.M.

**\*TELEPHONE/COFFEE BREAK**

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

**Wednesday, October 26**

7:00 – 7:50 A.M.

**BREAKFAST**

8:00 – 10:00 A.M.

**SUPERVISING THE GENERATIONS or similar**

More information to follow

*Instructor:* TBD

10:00 – 10:15 A.M.

**\*TELEPHONE/COFFEE BREAK**

10:15 A.M. – 12:15 P.M. (1)

**IT, CYBERSECURITY & THE CLERK'S OFFICE**

Information Technology is an important part of the Clerk's office. This session will provide an overview of cybersecurity issues and steps municipalities can take to protect their data and this communication channel.

*Instructor:* Darrell Ackley  
New Mexico Tech, Socorro, NM

12:15 – 12:55 P.M.

**LUNCHEON – All Participants**

**Wednesday, October 26** – *continued*

1:00 – 5:15 P.M. (1) **ELEMENTS OF EFFECTIVE SUPERVISION**  
More information to follow

*Instructor:* TBD

3:00 – 3:15 P.M. **\*TELEPHONE/COFFEE BREAK**

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

**Thursday, October 27**

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:* Adam Hathaway, PRP

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. (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:* Representatives from the Attorney General's office

6:30 – 9:00 P.M. **RECEPTION**  
***with Master Municipal Clerk Academy Participants***

**Friday, October 28**

7:00 – 7:50 A.M.

**BREAKFAST**

**JOINT SESSION WITH ACADEMY**

8:00 – 10:00 A.M.

(3)

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

This session will provide a detailed review of the legislative process including the committee structure, progress of a bill through the legislative system and final action by Legislature and Governor; will provide an in-depth description of 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:*

AJ Forte, Executive Director  
Alison Nichols, Director of Policy  
New Mexico Municipal League

10:00 – 10:15 A.M.

**\*TELEPHONE/COFFEE BREAK**

10:15 A.M. – 12:15 P.M.

(1)

**FIRST AMENDMENT AUDITORS**

An in-depth look at First Amendment Auditors and how their tactics can impact a municipality. Participants will discuss procedures to minimize costs – both monetary and public relations. [Ask AJ for more for the description]

*Instructor:*

AJ Forte, Executive Director  
New Mexico Municipal League

***-INSTITUTE ADJOURNS-***