



NM MUNICIPAL CLERKS CERTIFICATION INSTITUTE

YEAR II – SERIES 12

OCTOBER 16-20, 2017

MCM ELEGANTÉ HOTEL - ALBUQUERQUE, NM

Total Institute Hours: 35.75

- Preliminary Program -

SUNDAY, OCTOBER 15

3:30 – 5:30 PM

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

5:30 PM

DINNER - All Participants

Following Dinner

GET ACQUAINTED PERIOD - All Participants

MONDAY, OCTOBER 16

7:00 – 7:50 AM

BREAKFAST

All Participants attend the following:

8:00 AM – 12:15 PM

(1)

CONFLICT RESOLUTION/ASSIGNMENT OF INSTITUTE PAPER (Assessment)

The purpose of this session is to explore the cause of conflict in the workplace and understand that conflict can be beneficial (positive) or negative, leading to disputes. Students will learn how to resolve positive and negative conflicts with emphasis on those faced by clerks by learning a variety of conflict resolution techniques. Students will analyze their own conflict resolution style and how to select an appropriate strategy for conflict resolution.

Instructor:

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

10:00 – 10:15 AM

***TELEPHONE/COFFEE BREAK**

12:15 – 12:55 PM

LUNCHEON – All Participants

MONDAY, OCTOBER 16 -- Continued

Year I Participants attend the following:

1:00 – 3:00 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, Clerk/Administrator
Village of Bosque Farms

Renee Cantin, CMC, Clerk – City of Alamogordo

3:00 – 3:15 PM

***TELEPHONE/COFFEE BREAK**

3:15 – 5:15 PM

(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/Clerk-Treasurer
Village of Cloudcroft

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

Year II & III Participants attend the following:

1:00 – 5:15 PM

(1)

**BEYOND THE LEADERSHIP CHALLENGE:
Developing Your Team Leadership Skills**

This session continues the exploration of the leadership challenge of how to build an effective team, how to attract and retain excellent employees, and how to establish a climate that motivates performance excellence. Participants will gain practical knowledge and tools to put to use.

- What is Leadership?
- 5 Practices of Exemplary Leadership
- “First, Break All the Rules”
- Your Leadership Skills
- Team Leadership
- What’s Next? Your Skills Development Plan

Instructor:

Steven G. Meilleur, Ph.D., SPHR
Adjunct Faculty – Graduate Studies
UNM School of Public Administration

MONDAY, OCTOBER 16 -- Continued

3:00 – 3:15 PM

***TELEPHONE/COFFEE BREAK**

- DINNER ON YOUR OWN -

TUESDAY, OCTOBER 17

7:00 – 7:50 AM

BREAKFAST

Year I Participants attend the following:

8:00 – 10:00 AM

(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
City of Alamogordo

10:00 – 10:15 AM

***TELEPHONE/COFFEE BREAK**

10:15 AM – 12:15 PM

(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:

Charles "Chay" Rennick, Attorney
Robles, Rael & Anaya – Albuquerque

TUESDAY, OCTOBER 17 -- Continued

Year II & III Participants attend the following:

8:00 – 10:00 AM

(2)

EMPLOYEE MOTIVATION AND ENGAGEMENT:

The Key to Leadership

Motivation is fundamental to employee engagement and performance. It is what drives us to set and attain goals. The goal of employee engagement is to enhance employees to exercise discretionary effort and the best way to achieve it is through motivating them. When employees are motivated, they engage each other through teams to improve the performance of the organization.

This session will explore best practices for building motivation and employee engagement, using the Five I's of Employee Engagement:

1. **Inform:** Provide employees the information they need to understand the organization's vision and brand values, along with how customers feel about the organization.
2. **Inspire:** Connect employees to the organization's vision and values so they believe those matter and they take pride in their job and the organization.
3. **Instruct:** Support employees with the training, coaching, and feedback they need to successfully deliver the organization's brand promises to customers.
4. **Involve:** Take action with employees when designing their jobs, improving work processes, and solving problems identified through customer or employee feedback.
5. **Incent:** Deploy appropriate systems to measure, reward, and reinforce desired employee behaviors and motivate employees to give their best.

Learn how you can use the tools needed to create and maintain a high degree of meaningful employee engagement, motivation, and performance.

Instructor:

Steven G. Meilleur, Ph.D., SPHR
Adjunct Faculty – Graduate Studies
UNM School of Public Administration

10:00 – 10:15 AM

***TELEPHONE/COFFEE BREAK**

TUESDAY, OCTOBER 17 -- Continued

Year II & III Participants attend the following:

10:15 AM – 12:15 PM (3)

LIABILITY ISSUES AND SAFETY IN THE WORKPLACE

The purpose of the Liability session is to sensitize the Clerks to opportunities to avoid claims and emphasize the importance of minimizing risk by being familiar with policy and procedures and following them, learning consequences of personnel decisions as well as knowing personal and municipal liability. Major statutes and common law principles on which liability claims against a governmental entity are based will be reviewed and provided.

The Safety session will assist participants to recognize safety hazards within the Clerk's office and in City Hall and provide ways to establish and implement policy, procedures and training to control or eliminate the recognized exposures for the safety and welfare of employees.

Instructors: Randy Bartell, Attorney at Law
Montgomery & Andrews, PA – Santa Fe

Brock Carter, President
Safety Counselling, Inc. – Albuquerque

12:15 – 12:55 PM

LUNCHEON – All Participants

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

1:00 – 3:00 P.M. (1)

MEETINGS VS. HEARINGS (Specialized -- Administrative, Zoning, Termination)

The purpose of this session is to explore the differences between meetings of a governing body and those specialized hearings that are required to be open to public participation. It will provide the requirements of public notice, openness of public meetings and public participation in regular meetings of governmental bodies. The second part will concentrate on quasi-judicial public hearings; their requirements, procedures, public participation, creating a record for appeal and preparation of findings and conclusions.

Instructor: Charles "Chay" Rennick, Attorney
Robles, Rael & Anaya – Albuquerque

3:00 – 3:15 PM

***TELEPHONE/COFFEE BREAK**

TUESDAY, OCTOBER 17 -- Continued

3:15 – 5:15 PM

(3)

“Getting Things Done: PERSONAL PRODUCTIVITY SKILLS & TIME MANAGEMENT”

This session will present a range of techniques for improving work performance to enable the development of expertise in self management practices.

- The nature and value of productivity
- Determining and managing priorities
- Negotiating your time & commitments
- Understanding what you can control & what you can't
- Managing interruptions & distractions
- People vs. tasks: your personal style
- Time management and effective communication
- Setting & achieving personal time management goals
- Developing new habits for managing your time
- Dealing with technology – emails, remote access, etc.

Instructor:

Steven G. Meilleur, Ph.D., SPHR
Adjunct Faculty – Graduate Studies
UNM School of Public Administration

- DINNER ON YOUR OWN -

WEDNESDAY, OCTOBER 18

7:00 – 7:50 AM

BREAKFAST

8:00 AM – 12:15 PM

(1)

PERSONNEL SYSTEMS FOR CITIES, TOWNS & VILLAGES

This session will assist to develop a fundamental understanding of the major roles & competencies of the public sector human resources function. It will convey the “why” of many processes and procedures and the “how” to decrease and minimize risk to the municipality.

- Recruitment and Retention
- Compensation and Benefits/FMLA
- Hiring Processes
- Personnel Files
- Performance Appraisals
- Discipline and Termination
- Equal Employment Opportunity
- Labor Relations in NM Public Sector
- Safety, Health and Risk Management

Instructor:

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

10:00 – 10:15 AM

***TELEPHONE/COFFEE BREAK**

WEDNESDAY, OCTOBER 18 -- Continued

12:15 – 12:55 PM

LUNCHEON – All Participants

1:00 – 5:15 PM

(1)

CREATING SOLID DOCUMENTATION FOR DISCIPLINE, GRIEVANCE HANDLING AND TERMINATION

The purpose of this session is to emphasize the importance of appropriate documentation as a critical tool for improving management and supervision. The participant will learn proper methods and objectives for documenting positive and negative performance in employees and for self-development. Emphasis will be placed on documenting for performance improvement of employees as well as application in corrective and disciplinary actions.

Instructor:

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

3:00 – 3:15 PM

***TELEPHONE/COFFEE BREAK**

- DINNER ON YOUR OWN -

THURSDAY, OCTOBER 19

7:00 – 7:50 AM

BREAKFAST

8:00 AM – 12:15 PM

(2)

VERBAL COMMUNICATION AND CUSTOMER SERVICE

This session will provide an in-depth knowledge of different customer styles, and participants will gain understanding of how their own style impacts how they deal with customers (citizens, employees, elected officials, etc.). It will offer ways on how to effectively handle customer complaints, how to maintain a positive image for the City Clerk's office, and how to correctly communicate good and bad news to customers.

- What is your mission?
- Cultural Differences
- Customer Service Styles – Which one is yours?
- Communicating Good vs. Bad News
- Generational Differences
- Phone Skills
- Active Listening

Instructor:

Liz Walcher, Ph.D., CPT
Organizational Consulting & Development
Albuquerque, NM

THURSDAY, OCTOBER 19 -- Continued

10:00 – 10:15 AM

***TELEPHONE/COFFEE BREAK**

12:15 – 12:55 PM

LUNCHEON – All Participants

1:00 – 3:00 PM

(1)

**COMPUTERIZED PROCESSES/APPLICATIONS
AND 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.

- Using Financial Packages for Business Processes.
- How Desktop Processing has Reshaped the Duties of our Workforce.
- SCADA -- What is it and How can it help?
- The "Cloud"\Remote Computing\VPN, Firewalls and Gateway Devices.
- Mobile Phones and the Wireless Workforce.

Instructor:

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

3:00 – 3:15 P.M.

***TELEPHONE/COFFEE BREAK**

3:15 – 5:15 P.M.

(3)

CURRENT MUNICIPAL ISSUES

This session will provide an overview of the mandates, regulations, policies and problems municipalities will face in the upcoming year. This knowledge will assist Clerks to facilitate policy discussions and decisions with key administrative/elected officials.

Instructor:

Regina Romero
Intergovernmental Relations Director
New Mexico Municipal League

6:30 – 9:00 P.M.

JOINT RECEPTION & GRADUATION BANQUET
With Master Municipal Clerk Academy Participants

FRIDAY, OCTOBER 20

7:00 – 7:50 AM

BREAKFAST

8:00 – 11:00 AM

(1)

PROCUREMENT BASICS

This session will provide an overview of the Procurement Code and its processes & requirements. It will focus on state & local laws/regulations as they apply to municipalities.

- Introduction to Purchasing
- What is Procurement and what is your role?
- What is the Procurement Code and where do I find it?
- Who does the Procurement Code apply to and do I have to follow it?
- What are the Procurement Code limits and dollar thresholds?
- What things are exempt from the Procurement Code?
- What other procurement options/methods are available?
- Sole Source and Emergency Procurement
- Chief Procurement Officer Registration
- State Use Act
- Right to Protest
- Ethics
- Miscellaneous Issues – Public Works, Taxes, Anti-Donation, Conflict of Interest, Governmental Conduct Act
- Questions and Answers Session

Instructor:

Kristi Benson, CPPO, CPPB
Chief Procurement Officer
City of Farmington

11:00 AM – 12:00 PM

(3)

REVIEW OF INSTITUTE PAPER

Instructor:

Dr. Zane Reeves, Regents' Professor
UNM School of Public Administration

12:00 – 1:00 PM

LUNCHEON & ADJOURNMENT

*It is requested that all telephone calls be done during this time period to prevent class disturbance.

-INSTITUTE ADJOURNS-