

September 25, 2009

Volume 61, Issue 2

## Montana Municipal Clerks, Treasurers, & Finance Officers



### *Message from the President*

Dear Fellow Clerks, Treasurers and Finance Officers:

Once again the summer has flown by! To say that we have all been busy would be an understatement.

There have been all kinds of issues thrown at us this past year, and somehow we seem to be able to cope. I think the “list serve” has been a very valuable tool in helping all of us. I’m hopeful that all 129 cities and towns are on this list. If not, perhaps that can be our goal.

The 78th Annual Conference of the Montana League of Cities and Towns will be held October 7<sup>th</sup>, 8<sup>th</sup>, & 9<sup>th</sup> at the Heritage Inn in Great Falls. I would encourage you to attend this Convention if at all possible. Our MMCT&FOA Semi-Annual Meeting is scheduled for Wednesday, October 7<sup>th</sup>, 2009 from 8 AM - 10 AM (at the latest). I would like to set up a committee to handle the Web site, so please, if you’re a web site expert, step up and serve on this new committee. After the meeting, the Education Committee has invited Dave Cole from Dept. of Commerce, and Darla Erickson from Dept. of Administration to talk about the ARRA funds and different programs from 10 – 12 noon. And don’t forget the pizza party social on Tuesday night!

The following Executive Board positions will be voted on at this meeting:

- President
- Vice President of 3<sup>rd</sup> Class Cities
- Secretary

If you are interested in serving, please submit a letter of interest to Carol Schmoeckel, Chairperson or Kelly Thiel of the Nominating Committee, by September 30, 2009. These positions will be voted on by our membership during the Semi-Annual Meeting. Please remember to pay your dues to stay active as a member and remain eligible to vote.

I want to again thank Education Committee Chair, Brenda Schneider and committee members for doing a fantastic job putting together the 2009 Institute. Dan and Molly did an excellent job as well, and are already working on next year’s Institute. We will certainly miss Molly. The LGC has hired her replacement, so let’s give a warm welcome to Jen Blessum.

Also, thank you to all of the committee chairs and members for everything you have done and continue to do. Special thanks to Liz Roos for putting the Newsletter together!!

This is my last newsletter message as your president. It has been an honor and privilege to serve you. I am looking forward to serving as the Immediate Past President to lend a hand to the new president, just as Mike Eve assisted me when I was a rookie president! I had a great teacher, and hope to continue the successful progression.

**HOPE TO SEE YOU AT THE 2009 MLCT CONVENTION IN GREAT FALLS!!**

Mary Embleton, MMCT & FOA President

### Inside this issue:

<i>President’s Message</i>	1
<i>Education Committee News</i>	2
<i>MLCT Conference &amp; Pizza Party</i>	3
<i>Minutes</i>	4
<i>Agenda</i>	9
<i>Committees</i>	10

“The Monster under my bed wants another cookie.”

—Steven  
Age 7

## Education Committee News

The Education Committee has set up a session at the League Conference after the association meeting with Dave Cole, Commerce and Darla Erickson, Local Government Services to speak about the stimulus funds and reporting requirements and accounting requirements for stimulus funds.

May 2009 Institute had 112 in attendance:

1 <sup>st</sup> year	<u>16</u>
2 <sup>nd</sup> year	<u>17</u>
3 <sup>rd</sup> year	<u>19</u>
Grads	<u>57 (26-5 day and 31- 3 day)</u>

The Education Committee met in August to start planning for 2010 institute. The dates will be May 2-8, 2010 in Billings.

The Committee has added the following classes to the curriculum for 2010.

- Understanding Legal Documents
- Effective Listening
- Creative Problem Solving
- Electronic Records Discovery,
- Analyzing Utility Rates
- The Gray in Ethics
- Fraud Detection & Deterrence,
- Districts—Special Improvements, Maintenance, Tax Increment, etc.
- You’re a Key Player—Building and Protecting the Integrity and Trust of Your Management Team

These classes will replace classes that have been done numerous times in the past. The removed classes will remain a part of the curriculum and still be able to be used in the future.

Also, there will be “Back to Basics” sessions on Wednesday for new clerks and treasurers, budgeting, annual report, accounting. This will be a separate track from the Clerk and Treasurer Tracks. The Clerk and Treasurers tracks will be for the advanced classes.

There have been questions regarding the use of attendance cards and why they are necessary. The attendance cards are the **only** way that we can verify training and attendance to IIMC, APT, our Association for certifications and for MSU continuing education units. If you do not need or ever plan to apply for any of the certifications or the continuing education units you are not required to use the attendance card. You will not receive a graduate certificate without the attendance cards. **BUT, if in the future you want to apply for a certification any sessions attended without an attendance card will not count toward certification as attendance cannot be verified. You will need to attend the 3 year series again for certification.**

**Don't forget your basket for the Silent Auction during the MLCT Conference in Great Falls!**

**All proceeds support the MMCT & FOA scholarship fund.**

# MMCT & FOA Work Shop, October 7, 2009

Heritage Inn

Great Falls, MT

- 8:00 AM Semi-Annual MMCT & FOA Meeting
- 10:00 AM Dave Cole, MT Department of Commerce
- Darla Erickson, MT Department of Administration

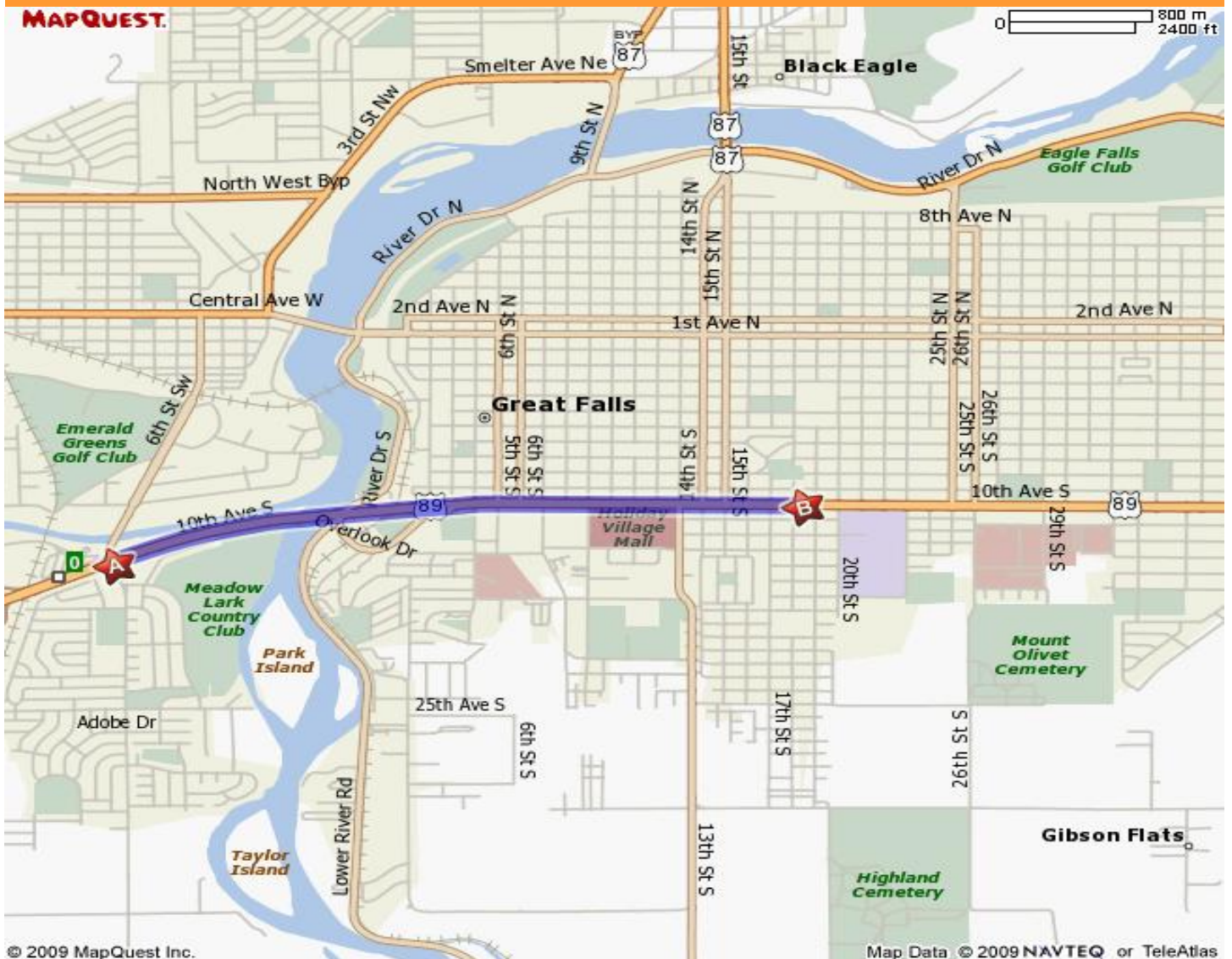
## Annual Clerk's Pizza Party

October 6, 2009

6:30 PM-10 PM

A: Best Western Heritage Inn, 1700 Fox Farm Road

B: The Sting Sports Bar & Grill, 1826 10th Ave S



MONTANA MUNICIPAL  
CLERKS – TREASURERS – FINANCE OFFICERS  
ASSOCIATION

Executive Board Meeting Minutes

Jorgenson's Trophy Room

Friday, August 21, 2009

Helena, MT

The Executive Board meeting was called to order by President Mary Embleton at 8:15am. .

The following executive board members were present:

Mary Embleton, President	Laurel
Carolyn Schmoeckel, Secretary	Malta
Marlene Banninger, Treasurer	Fairfield
Stacy Ulmen, Vice President of 1 <sup>st</sup> & 2 <sup>nd</sup> Class Cities	Bozeman
Ron Barndt, Vice President of Towns	Columbus
Education Board Members:	
Brenda Schnieder, Chairperson	Superior
Kelly Thiel	Plentywood
Lorraine Mulonet	Chinook
Sandra Johnson	Troy
Carolyn Schmoeckel	Malta

Minutes of the fall meeting in Billings were reviewed. Ron Barndt moved to approve the minutes, 2<sup>nd</sup> by Marlene Banninger. Motion carried unanimously.

President Embleton called a recess and turned the meeting over to the Education Committee at 8:20am.

Also present at 10am was Dan Clark and Jen Blessum of the Local Government Center.

At 11:52am President Embleton reopened the executive board meeting.

President Embleton acknowledged the evaluations report prepared by Local Government Center and stated they also did a great job of tracking and reporting institute expenses.

Dan Clark introduced Jen Blessum, new associate at Local Government Center. Members introduced themselves to Ms. Blessum.

President Embleton reported on the website issue. Chelsie LaBelle from Thompson Falls has been in contact with Kathy Denke's son, Matt Ricahardson. Mr. Richardson initially helped set up the website and is willing to update it for a small cost. President Embleton stated she would like to form a new standing committee of at least three committed persons to work on the website. Carolyn Schmoeckel moved to allow the formation of the new committee, 2<sup>nd</sup> by Ron Barndt. During discussion, it was decided to establish a link with Local Government Center website. Motion carried unanimously.

Education Committee Chairperson Brenda Schneider reported registration fees for institute will remain the same. Also, it should be noted on the registration form that all participants should bring a calculator for some scheduled classes. Next date for institute in Billings is May 2-8, 2010. Schneider stated copy costs for institute are high and that maybe the association could rent a copier for that week. This issue will be discussed at the next association meeting. It was decided to once again use the colored dots on name tags distinguishing first, second, third year students and graduates. No meal will be offered before the Sunday night session, just beverages. Marlene Banninger moved to approve the meal change, 2<sup>nd</sup> by Ron Barndt. Motion carried unanimously. The change will be noted on the itinerary.

Dan Clark reported on the Webinar session, with it being noted another one should be scheduled in order for students to meet the required education hours.

Marlene Banninger presented a current treasurer's report. Trial balance as of June 30, 2009 is \$51,023.04 which includes a \$20,000.00 certificate of deposit. Expenditures of \$12,652.74 for fiscal year ending June 30, 2009. Ron Barndt moved to accept the treasurer's report, 2<sup>nd</sup> by Stacy Ulmen. Motion carried unanimously.

Additional expenditures for travel and supplies were presented for payment. Ron Barndt moved to pay the additional expenditures, 2<sup>nd</sup> by Stacy Ulmen. Motion carried unanimously.

President Embleton presented the proposed budget for 2009/10. The proposed expenditure budget is \$16,500.00. After discussion, Ron Barndt moved to approve 2009/10 budget, 2<sup>nd</sup> by Stacy Ulmen. Motion carried unanimously.

President Embleton stated no updated committee list will be presented at this time.

Treasurer Marlene Banninger stated the association needs to purchase a new seal. A cost will be presented at the October meeting.

Stacy Ulmen stated she needs help running the sound system at institute. With several sessions going on at the same time, it was very difficult for her. Volunteers will be recruited to help in May. Stacy also reported that she will again have her karaoke equipment at institute

Nominating Committee Chairperson Carolyn Schmoeckel reported one letter of interest has been received for the secretary position and one for the president position.

All persons were reminded to bring a raffle basket or item for the silent auction. Participation is down.

With no other business the meeting was adjourned at 12:39.

Respectfully submitted:

Carolyn Schmoeckel

Secretary



**MONTANA MUNICIPAL**

Clerks – Treasurers – Finance Officers

**ASSOCIATION**

Minutes of Semi-Annual Business Meeting

May 6, 2009

Billings, Montana

The semi-annual meeting of the Montana Municipal Clerks, Treasurers and Finance Officers Association was called to order by President Mary Embleton at 5:00 pm. President Embleton introduced the officers to the association members. Association members introduced themselves. Officers present were:

Board Members:

- Mary Embleton, President
- Stacy Ulmen, Vice President of 1<sup>st</sup> & 2<sup>nd</sup> Class Cities
- Doris Pinkerton, Vice President of 3<sup>rd</sup> Class Cities
- Ron Brandt, Vice President of Towns
- Marlene Banninger, Treasurer
- Carolyn Schmoeckel, Secretary

Members present:

- |                     |                  |
|---------------------|------------------|
| Ames, Pam           | Columbus         |
| Baccaro, Sherri     | Whitefish        |
| Banninger, Marlene  | Fairfield        |
| Barndt, Ron         | Columbus         |
| Barnett, Pam        | Melstone         |
| Becker, Stacy       | Glasgow          |
| Brummond, Nikki     | Lewistown        |
| Burkhalter, Billie  | Miles City       |
| Clark, Laurae       | Bozeman          |
| Clute, Janice       | Drummond         |
| Conroy, Tari        | Darby            |
| Corbin, Pat         | Forsyth          |
| Corey, Mary         | Choteau          |
| Davis-Anthony, Jean | Glasgow          |
| Deeney, Betty       | Grass Range      |
| Duram, Mary         | Eureka           |
| Dyckman, Michelle   | Hardin           |
| Elliott, Rose       | Whitefish        |
| Embleton, Mary      | Laurel           |
| Ferreras, Daisy     | Virginia City    |
| Fontana, Jean       | Belt             |
| Fowler, Agnes       | Conrad           |
| Fruit, Peggy        | Broadus          |
| Fuhringer, Cheri    | Dutton           |
| Gospodarek, Lanie   | West Yellowstone |

---

Gregory, Delores	Dillon
Grose, Cathy	Twin Bridges
Heydon, Mary	Fort Benton
Hines, Dianna	Malta
Johnson, Sandra	Troy
Kaler, Brenda	Ryegate
Kimp, Roni	Stevensville
Kissle, Aimee	Bozeman
Lazaro, Julie	Hot Springs
Leary, Gail	Sheridan
Lorang, Necile	Whitefish
McKinney, Nancy	Darby
Melton, Kaylene	Ronan
Mulonet, Lorraine	Chinook
Parchen, Patricia	Fort Benton
Parker, Kala	Polson
Payovitch, Pam	Livingston
Philly, Denise	Stevensville
Pinkerton, Doris	Forsyth
Pray, Kori	Miles City
Rebo, Tracy	Troy
Richards, Michelle	Colstrip
Rogers, Jodi	Choteau
Rogers, Nikki	Missoula
Schmoeckel, Carolyn	Malta
Schneider, Brenda	Superior
Southland, Sonya	Scobey
Thiel, Kelly	Plentywood
Tomicich, Debbie	Red Lodge
Ulmen, Stacy	Bozeman
Vanek, Tonya	Lewistown
Nelson, Madean	Thompson Falls

President Embleton stated a representative from APT US&C was to be our first guest, but has not yet arrived.

President Embleton stated the minutes from the fall meeting were printed in the newsletter and hoped all had an opportunity to read them. Brenda Schneider moved to approve the minutes, 2<sup>nd</sup> by Lorraine Mulonet. Motion carried unanimously.

President Embleton called upon Treasurer Marlene Banninger for a report. A written report was distributed for member review. Expenditures from October 17, 2008 through May 3, 2009 totaled \$6,545.24, additional expenditures are \$100.00 for a PV mixer, treasurer expenses of \$124.07 and approximately \$50.00 to Stacey Ulmen for power cords, batteries and etc. Pam Payovitch moved to approve the expenditure report and to pay outstanding expenses, 2<sup>nd</sup> by Sandra Johnson. Motion carried unanimously.

Treasurer Marlene Banninger stated she has put the accounting on Quick Books. A financial report was presented with a trial balance as of April 23, 2009 of \$46,762.04. Jeannie Davis-Anthony moved to approve the financial report, 2<sup>nd</sup> by Kelly Thiel. Motion carried unanimously.

President Embleton stated she would do committee reports and accept one motion after all reports are received.

**Committee Reports:**

Education: Brenda Schneider, Education Committee Chairman reported 112 attendees this year. Education board members were introduced to association members. Mrs. Schneider asked all attendees to be sure to complete and hand in the evaluations at the end of the week. She stated the evaluations are very important tool for the Education Committee. Mrs. Schneider stated the Education Committee and Local Government Center tried unsuccessfully to get IIMC to accept the notary class as meeting an education requirement. Senate bill 249 passed and will become law concerning notary publics. The Education Committee will continue this endeavor as other states now have passed the same law. Mrs. Schneider mentioned persons that receive their certificates this year will still have to complete an additional four hours of training. Institute will be held on the following dates: May 2-8, 2010, May 1-6, 2011, May 6-12, 2012, and May 5-11, 2013.

Fund Raising: It was reported that Mary Meserve’s husband has passed away and is not present this year to sell 50/50 tickets. Agnes Fowler, Peggy Fruit and Mary Duram volunteered to sell the tickets. Marlene Banninger reported nine sponsors helped with the breaks for a total collected of \$2,125.00.

Silent Auction: With the absence of Theresa White, Marlene Banninger reported that \$618.00 was collected from the silent auction. All entities were encouraged to continue bringing items for the auction.

Courtesy: Mary Corey reported that several cards and flower arrangements have been sent on behalf of the association.

Website: President Embleton reported the website is going nowhere. Pass codes have not been retrieved. Discussion followed with it being suggested that the association just start fresh. The material on-line is very outdated. A final decision will be made at the fall meeting.

MMCT&FOA Achievement Award: Lanie Gospodaek reported one nomination has been received and the award will be given at the Thursday night banquet.

IIMC: President Embleton reported convention will be in Chicago this year. The newsletter is now available on-line. Embleton stated scholarships are available and members should try to attend the conferences.

GFOA: No report. President Embleton stated two books and assorted packets have been donated by GFOA. General consensus was to give the items to new persons attending institute.

Agnes Fowler moved to accept the committee reports, 2<sup>nd</sup> by Vanice Woodbeck. Motion carried unanimously.

**Other Business:**

- 1) President Embleton updated and corrected the committees list.
- 2) President Embleton reminded persons to submit letters of interest to the nominating committee for the following officer positions that will be available at the fall meeting:

- President
- Secretary
- VP of 3<sup>rd</sup> class cities

- 3) Reports from District meetings were given by following:

- District A: Necile Lorang, held in Polson
- District B: Lorraine Mulonet, held in Chinook
- District C: Carolyn Schmoeckel, held in Ft. Peck
- District D: No report
- District E & F: Stacy Ulmen, held in Bozeman

- 4) Pam Ames reported on memorial scholarships. Two were given this year, one to Ekalaka and one to Winifred for \$200.00 each. Ms. Ames stated some wordage changes in requirements will be presented at the fall meeting.

With no other business or comments, Mary Duram moved to adjourn, 2<sup>nd</sup> by Kelly Thiel. Meeting adjourned at 6:15pm.

Respectfully submitted:

Carolyn Schmoeckel  
Secretary  
MMCT & FOA

# **AGENDA**

## **SEMI-ANNUAL MEETING**

### **MMCT & FOA**

Wednesday, October 7, 2009 8-9:30 A.M.

Heritage Inn, American Room

Great Falls, Montana

#### **1. Call to Order**

#### **2. Minutes - Executive Board Meeting – August 21, 2009**

#### **3. Treasurer's Report**

- a. Claims
- b. Financial Report

#### **4. Presentation of FY 2009/2010 Budget**

#### **5. Committee Reports**

*(Note: All committee reports will be accepted in one motion after the last report has been presented)*

- a. Education – Brenda Schneider, Chair
- b. Welcoming – Carol Markuson, Chair
- c. Finance & Audit – Carolyn Schmoeckel, Chair
- d. Fund Raising / Silent Auction – Marlene Banninger, Co-Chair
- e. Courtesy – Mary Corey, Chair
- f. Legislative – Sandy Johnson, Chair
- g. Nominating – Carolyn Schmoeckel, Chair
- h. Website – Chelsea LaBelle
- i. MMCT&FOA Lifetime Achievement Award – Vicky Ellison, Chair

#### **6. Professional Association Reports**

- a. IIMC – Report on annual conference - Theresa White
- b. GFOA – Report on annual conference – Lowell Swenson
- c. APT US&C

#### **7. District Reports**

- a. District A
- b. District B
- c. District C
- d. District D
- e. District E & F

#### **8. District Meetings**

- a. Select 2009-2010 District Chairperson
- b. Select City and date for District Meeting
- c. Report from each District by new Chairperson

#### **9. Elections**

- a. Election of Officers
- b. Election of League Secretary
- c. Installation of Officers

#### **10. Comments from Association Members**

#### **11. Adjournment**

**MONTANA MUNICIPAL CLERKS, TREASURERS, & FINANCE OFFICER'S ASSOCIATION  
EXECUTIVE BOARD AND COMMITTEE MEMBERS**

7/1/2009

**President**

Mary Embleton  
Clerk/Treasurer  
P.O. Box 10  
Laurel, MT 59044

**Vice-President of:  
1st & 2nd Class Cities**

Stacy Ulmen  
Clerk of the Commission  
PO Box 1230  
Bozeman, MT 59771

**3rd Class Cities**

Doris Pinkerton  
  
Clerk/Treasurer  
PO Box 226  
Forsyth, MT 59327

**Towns**

Ron Barndt  
Clerk/Treasurer  
PO Box 549  
Columbus, MT 59019

**Secretary**

Carolyn Schmoeckel  
Clerk/Treasurer  
P.O. Box 1300  
Malta, MT 59538

**Treasurer**

Marlene Banninger  
City Clerk/Treasurer  
P.O. Box 8  
Fairfield, MT 59436

**Immediate Past President**

VACANT

**Education**

Brenda Schneider, Superior - Chair  
Sandra Johnson, Troy  
Lorraine Mulonet, Chinook  
Carolyn Schmoeckel, Malta  
Kelly Thiel, Plentywood  
  
Kori Pray, Miles City  
  
Julie Lazaro, Hot Springs

**Welcoming**

Carol Markuson, Circle - Chair  
Necile Lorang, Whitefish

**Finance & Audit**

Carolyn Schmoeckel, Malta – Chair  
Pam Ames, Columbus

**Newsletter**

Elizabeth Roos, West Yellowstone  
-Chair

**Fund Raising**

50/50 Tickets: Mary Meserve, Winnett

Corporate Sponsorships: Marlene  
Banninger, Fairfield

Silent Auction: Theresa White, Kalispell

**Historian**

Agnes Fowler, Conrad - Chair

**Convention**

Lisa Kunz, Great Falls

**Records Retention**

Marty Rehbein, Missoula - Chair

**Legislative**

Sandra Johnson, Troy - Chair  
Ron Barndt, Columbus

**Nominating**

Carolyn Schmoeckel, Malta- Chair  
Kelly Thiel, Plentywood

**Courtesy**

Mary Corey, Choteau - Chair  
Raedelle Aspenlieder, Culbertson

**MMCT&FOA Achievement Award**

Vicky Ellison, Manhattan – Chair  
Pam Payovich, Livingston  
Melanie Gospodarek, West  
Yellowstone

**IIMC Representative**

Theresa White, Kalispell

**GFOA Representative**

Lowell Swenson, Havre

**APT US&C Representative**

Lowell Swenson, Havre

**Website**

Chelsea LaBelle, Thompson Falls

**District Chairs**

A: Jayne Devlin, Black Mountain  
B: Lorraine Mulonet, Chinook  
C: Marlene Mahlum, Wolf Point  
D: Ron Barndt & Pam Ames,  
Columbus  
E&F: Stacy Ulmen, Bozeman

2009 Municipal Institute Graduates

