



2017 Clerks, Treasurers & Finance Officers Institute
June 21-23, 2017 **Holiday Inn & Convention Center, Stevens Point**

AGENDA

WEDNESDAY AFTERNOON, June 21

Matt Trebatoski presiding
Ft. Atkinson City Manager/Finance Director
President, Wisconsin Clerks, Treasurers & Finance Officers

- 11:30 a.m.** **Registration opens**
- 1:30 p.m.** **GENERAL SESSION**
Welcome
Mike Wiza, *Mayor of Stevens Point*
- 1:45 p.m.** **Legislative Update**
Curt Witynski, *League of Wisconsin Municipalities*
Assistant Executive Director
- 2:30 p.m.** **BREAK**
Sponsored by Johnson Block & Company, Inc.
- 2:45 p.m. -** **Department of Revenue Update**
4:15 p.m. Moderator: Kelly Tarczewski,
City Clerk/Treasurer, Pewaukee
Speakers: Deb Werner-Kelln, *Revenue Auditor,*
Local Government Services (LGS); Stacy Leitner &
Kristin Filipiak, *Community Services Specialists,*
Office of Technical & Assessment Services, DOR
- 5:30 p.m.** **Cocktails**
- 6:30 p.m.-** **Picnic**
7:30 p.m. *Sponsored by Wegner, CPAs*

THURSDAY MORNING, June 22

- 8:00 a.m.** **Coffee & Rolls**
- 8:30 a.m.** **1) Levy Limits & Expenditure Restraints**
CONCURRENT Moderator: Steve DeQuaker, *Burlington Finance*
SESSIONS *Director; Speakers: Dawn R. Gunderson,*
Ehlers, Inc. Senior Municipal Advisor/Vice President
and Greg Johnson, *Ehlers, Inc. Senior Municipal*
Advisor/Vice President
- 2) Agendas, Minutes, Resolutions &**
 Ordinances
Moderator: Sandi Wesoloski, *City Clerk, Franklin;*
Speaker: Daniel Olson, *League of Wisconsin*
Municipalities Assistant Legal Counsel
- 10:00 a.m.** **BREAK**
Sponsored by Ehlers, Inc.
- 10:15 a.m.** **1)Excel Tools & Tips**
CONCURRENT Moderator: David Kurihara, *Lancaster City*
SESSIONS *Clerk/Treasurer; Speaker: Chad Jarvi, Civic*
Systems
- 2) Election Updates**
Moderator: Deb Hall, *Marshfield City Clerk;*
Speaker: *Wisconsin Elections Commission Staff*
- 11:45 a.m.** **Business Meeting/Lunch**
Sponsored by WEA Trust

THURSDAY AFTERNOON, June 22

- 1:00 p.m. -** **1) Tax Incremental Financing Updates**
CONCURRENT Moderator: Steve DeQuaker, *Burlington Finance*
SESSIONS *Director; Speakers: Dawn R. Gunderson,*
Ehlers, Inc. Senior Municipal Advisor/Vice President
and Greg Johnson, *Ehlers, Inc. Senior Municipal*
Advisor/Vice President
- 2) Information on Act 211/Injury Illness**
 Reporting Requirements
Moderator: David Kurihara, *Lancaster City*
Clerk/Treasurer; Speakers: Lenny Kanter, Dept. of
Safety & Professional Services UDC Engineering
Consultant and April Hammond, Dept. of Safety &
Professional Services Occupational Safety Inspector
- 2:30 p.m.** **BREAK**
Sponsored by Ehlers, Inc.
- 2:45 p.m.-** **1) Employment Law**
4:15 p.m. Moderator: John Somers, *Beaver Dam Director of*
CONCURRENT *Administration; Speaker: Steve Zach, Boardman &*
SESSIONS *Clark, LLP Attorney*
- 2) Public Records Law**
Moderator: Carolyn Toms-Neary, *Cudahy*
Director of Office Services; Speaker: Paul Ferguson,
Department of Justice Assistant Attorney General
- 5:00 p.m.** **LeRoy Butler MEET & GREET!**
Sponsored by WEA Trust

FRIDAY MORNING, June 23

- 8:30 a.m.** **Coffee & Rolls**
Sponsored by LWM Mutual Insurance
- 9:00 a.m.** **GENERAL SESSION**
10 Important Security Measures to Keep
Your Municipality Safe in our Cyber-
Connected World
Moderator: Steve Braatz, *Mukwonago Village*
Clerk/Treasurer; Speaker: Scott Hirschfeld,
CTaccess, Inc.
- 10:15 a.m.** **BREAK**
Sponsored by Associated Appraisal
Consultants, Inc.
- 10:30 a.m.** **5 Steps to Creating Systems that Make**
Your Municipality More Effective
Moderator: Steve Braatz, *Mukwonago Village*
Clerk/Treasurer; Speaker: Scott Hirschfeld,
CTaccess, Inc.
- 11:45 a.m.** **Adjournment**

Officers

President: Matt Trebatoski, *Ft. Atkinson City Manager/Finance Dir.*
1st Vice President: Steve DeQuaker, *Burlington Finance Director*
2nd Vice President: Sandi Wesolowski, *Franklin City Clerk*
Secretary: Steve Braatz, Jr., *Mukwonago Village Clerk-Treasurer*
Treasurer: Ralph Chipman, *New Berlin City Finance Director*

Trustees

Kelly Tarczewski, *Pewaukee City Clerk-Treasurer*
Deb Hall, *Marshfield City Clerk*
Dave Kurihara, *Lancaster City Clerk/Treasurer*

Past Presidents

Carolyn Toms-Neary, *Cudahy Director of Office Services*
Julia Mann, *Tomah City Treasurer*
John Somers, *Beaver Dam Director of Administration*

Register online at www.lwm-info.org



2017 Wisconsin CTFO Institute Registration Form
Holiday Inn & Convention Center, Stevens Point
June 21-23, 2017

Please return this form by June 14, 2017

Name _____ Title _____
Street Address _____
Municipality _____ State _____ Zip code _____
Phone number _____ email _____

WORKSHOP CHOICES: (choose one from each set of Thursday sessions; session titles on AGENDA)

- | | | | |
|---|---|---|---|
| <u>8:30 a.m.</u> | <u>10:15 a.m.</u> | <u>1:00 p.m.</u> | <u>2:45 p.m.</u> |
| <input type="checkbox"/> Track 1 | <input type="checkbox"/> Track 1 | <input type="checkbox"/> Track 1 | <input type="checkbox"/> Track 1 |
| <input type="checkbox"/> Track 2 | <input type="checkbox"/> Track 2 | <input type="checkbox"/> Track 2 | <input type="checkbox"/> Track 2 |

GUEST, RECEPTION, BANQUET AND SPECIAL NEED RESPONSES:

Are you bringing a guest? No. Yes. Guest's name _____
Attending Wednesday's Picnic? I will attend. My guest and I will attend. Can't make it.
Do you need amended arrangements to accommodate a disability or dietary need? No. Yes.
We will contact you to make the necessary arrangements.

REGISTRATION FEES:

Tuition for Members \$110 Tuition for Non-Members \$135 Guest Fee \$30 TOTAL \$ _____

On-line registration is encouraged at www.lwm-info.org. Paper registrations must be accompanied by payment.

- I am paying by CHECK. (Make check payable to League of Wisconsin Municipalities)
 I am paying by Credit Card Visa MasterCard

Card Number _____

Expiration Date _____ Security Code (back of card) _____

Signature _____

CONFERENCE HOTEL INFORMATION:

Make reservations directly with Stevens Point Holiday Inn & Convention Center at 715-344-0200.

Room charge: \$82 Single, \$99 Double **Reserve by May 31, 2017**

Please identify yourself as attending the League of Wisconsin Municipalities Clerks, Treasurers & Finance Officers Institute to obtain this rate. Room charges are subject to a 13.5% local and state taxes; a letter/certificate of exemption must be presented if the charge should be tax exempt.

THE FINE PRINT:

Only staff members and elected officials from cities and villages that are currently members of the League of Wisconsin Municipalities may register as members. Registration fees, minus a \$10 processing fee, are refundable if received three calendar days before the workshops begin.

Online Registration: www.lwm-info.org

FAX: 608-267-0645

League of Wisconsin Municipalities
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