



2018 Clerks, Treasurers and Finance Officers Institute Agenda

Chula Vista Resort, Wisconsin Dells

June 13-15, 2018

REGISTER BY JUNE 6, 2018!

Wednesday, June 13 Afternoon Session

- 11:30 a.m.** **REGISTRATION OPENS**
GENERAL SESSION
 Steve DeQuaker, Finance Dir-Treas., Burlington, President, Wisconsin Clerks, Treasurers & Finance Officers, presiding
- 1:30 p.m.** **Welcome**--Wisconsin Dells Mayor (*invited*)
- 1:45 a.m.** **Legislative Update/Advocacy Training**
 Speakers: Curt Witynski, Deputy Director; and Gail Sumi, Member Engagement/Communications Director--League of Wisconsin Municipalities
- 2:30 - 2:45 p.m.** **BREAK**
- 2:45 - 4:15 p.m.** **Department of Revenue Update**
 Moderator: Steve DeQuaker
 Speaker: Julie Raes, SLF Interim Admin., DOR
- 5:30 - 7:30 p.m.** **NETWORKING HOUR & PICNIC**
Dinner will be served at 6:30 p.m.

Thursday, June 14 Morning Session

- 8:00 a.m.** **Light Breakfast (protein/fruit/coffee) & Table Topic Discussions (NEW!)**
- 8:30 - 10:00 a.m.** **CONCURRENT SESSIONS**
1) Alcohol/Tobacco Licensing
 Moderator: Steve Braatz, Jr., City Clerk, West Allis
 Speakers: Jason Lee & Rick Uhlig, Agents, DOR
2) Financial Management Planning
 Moderator: Ralph Chipman, City Finance Director, New Berlin
 Speaker: Staff from Ehlers
- 10:00 - 10:15 a.m.** **BREAK**
- 10:15 - 11:45 a.m.** **1) Alcohol/Tobacco Licensing (continued)**
 Moderator: Kelly Tarczewski, City Clerk-Treasurer, Pewaukee
 Speaker: : Jason Lee & Rick Uhlig, Agents, DOR
2) State Reporting Form C & PSC Report
 Moderator: Myra Piergrossi, Village Finance Director, Fox Crossing
 Speaker: Dave Maccoux, Shareholder, Schenck Business Solutions

Guest Program includes the Wednesday Picnic.
 Suggestions for local area points of interest will be provided at registration, but there is no formal guest tour or programing.

Thursday, June 14 Afternoon Session

- Noon** **BUSINESS MEETING/LUNCH**
- 1:00 - 2:30 p.m.** **1) Elections**
 Moderator: Sandi Wesolowski, City Clerk, Franklin
 Speakers: Staff, Wisconsin Elections Commission
2) TIF Project Planning
 Moderator: John Somers, Director of Administration, Beaver Dam
 Speakers: Staff from Ehlers
- 2:30 - 2:45 p.m.** **BREAK**
- 2:45 - 4:15 p.m.** **1) Elections (continued)**
 Moderator: Deb Hall, City Clerk, Marshfield
 Speaker: Staff, Wisconsin Elections Commission
2) TIF Project Planning (continued)
 Moderator: Dave Kurihara, City Clerk/Treasurer, Lancaster
 Speakers: Staff from Ehlers

Friday, June 15 Morning Session

- 8:30 a.m.** **Light Breakfast (protein/fruit/coffee) & Table Topic Discussions (NEW!)**
- 9:00 a.m.** **Lean Government**
 Moderator: Carolyn Toms-Neary, Director of Office Services, Cudahy
 Speaker: Deb Kneser, Inspired Training & Development
- 10:15 - 10:30 a.m.** **BREAK**
- 10:30 a.m.** **Emotional Intelligence: Checks and Balances for Self-Awareness**
 Moderator: Matt Trebatoski, City Mgr./Finance Dir., Ft. Atkinson
 Speaker: Roger Wolkoff, All About Authenticity
- 11:45 a.m.** **ADJOURNMENT**

OFFICERS

- President** Steve DeQuaker, Finance Dir-Treas., Burlington (FD)
- 1st Vice President** Sandi Wesolowski, City Clerk, Franklin (CL)
- 2nd Vice President** Steve Braatz, Jr., City Clerk, West Allis (CL)
- Secretary** Ralph Chipman, City Finance Director, New Berlin (FD)
- Treasurer** Kelly Tarczewski, City Clerk-Treasurer, Pewaukee (CL)
- Trustees** Deb Hall, City Clerk, Marshfield (CL)
 Dave Kurihara, City Clerk/Treasurer, Lancaster (TR)
 Myra Piergrossi, Village Finance Director, Fox Crossing (FD)
- Past Presidents** Carolyn Toms-Neary, Dir. of Office Services, Cudahy (TR)
 John Somers, Dir. of Administration, Beaver Dam (FD)
 Matt Trebatoski, City Mar./Finance Dir.. Ft. Atkinson (CL)