



# 2024 KENTUCKY MUNICIPAL CLERKS INSTITUTE

JULY 15-19, 2024

ORIGIN HOTEL

4174 ROWAN, LEXINGTON, KY 40517

## Sunday, July 14 (all times Eastern)

5:00 p.m. – 7:00 p.m.      Registration  
Hospitality Suite – Origin Hotel

## Monday, July 15

7:00 a.m. – 8:00 a.m.      **Breakfast**

7:00 a.m. – 8:00 a.m.      **Registration**

8:00 a.m. – 9:30 a.m.      **City Clerk 101**

*City of Bowling Green City Clerk & KMCA President Ashley Jackson, MMC/  
KMMC*

Our Kentucky Municipal Clerks Institute will open with an introductory session led by our Kentucky Municipal Clerks Association President Ashley Jackson, who will explore the statutory responsibilities and duties of city clerks while providing insight into the certification process for the Kentucky Municipal Clerks Association as well as the International Institute of Municipal Clerks.

9:30 a.m. – 11:00 a.m.      **The Lonely HR**

*Hanna Resource Group Chief Operating Officer Candra Bryant*

*Hanna Resource Group Senior HR Consultant Vicki Crawford*

*Hanna Resource Group Director of HR Outsourcing Allison Pettrey*

In local governments across the state, managing human resource responsibilities often fall on the shoulders of a few dedicated individuals, if not solely one. This reality can make the role feel quite isolated. During our workshop, we'll explore strategies, shortcuts, and tools tailored to streamline the number of tasks you might find on your desk, aiming to enhance the effectiveness of your role as a municipal clerk—even if human resources isn't your sole focus. By the end of our time together, you'll be bolstered with knowledge and confidence to tackle a broad spectrum of challenges that come your way related to human resources.

11:00 a.m. – 12:00 p.m.      **Human Resources, Documentation, and Record Keeping in an Everchanging World**

*KLC Personnel Services Managing Attorney Chris Johnson*



Human resources issues are an everyday fact for our municipal clerks. This presentation will focus on the monthly calendar and when the best times of the year might be to address specific issues related to human resources in your city. This presentation will also look at documentation required by FMLA, ADA, IRCA, and drug-testing requirements.

12:00 p.m. – 1:00 p.m.

**Lunch**

1:00 p.m. – 2:00 p.m.

**Labor Law 101**

*KLC Personnel Services Attorney Michael Simon*

This presentation will provide a comprehensive overview of key labor topics including employment contracts, wage and hour laws, exempt classifications, anti-discrimination regulations, workplace safety, FMLA, labor posters, and recent legal trends. This session will equip clerks with essential knowledge for navigating employment regulations effectively.

2:00 p.m. – 3:30 p.m.

**Title VII: Harassment & Discrimination Issues**

*KLC Director of Municipal Law Morgain Patterson*

Federal and state law prohibits employer discrimination on the basis of a protected class. KLC developed this training to provide local government employers with an overview of prohibited behavior, information on reporting requirements, and generate a discussion amongst attendees using scenarios as a basis.

3:30 p.m. – 5:00 p.m.

**3 Part Training: Unlocking Excellence: Leadership and Team Development**

**Domain 1: Align Self - Cultivating Self-Awareness and Confidence**

*Tresane Founder David Baumgartner*

For our Unlocking Excellence: Leadership and Team Development three-part training, the first domain will focus on bolstering leadership and team member confidence by illuminating the influence of personal values on actions, reactions, and decision-making processes. By exploring the impact of factors such as self-talk and emotional awareness, we lay the groundwork for authentic leadership.

**Dinner on your own.**

## Tuesday, July 16

7:00 a.m. – 8:00 a.m.

**Breakfast**

8:00 a.m. – 9:30 a.m.

**Employment Law**

*KLC Personnel Services Managing Attorney Chris Johnson*

The hiring, firing, day-to-day oversight, and discipline of city employees provides both the area of greatest opportunity and greatest risks to our cities. This class will discuss the legal requirements from both the state and federal levels in order to give city clerks the tools they will need when an issue arises or at least who to call when they do for help.



9:30 a.m. – 10:30 a.m.

### **Open Records**

*KLC Municipal Law Attorney Megan Griffith*

This session will provide an update on the Kentucky Open Records Acts, including recent statutory changes, enforcement methods, compliance issues, and rules and regulations your city should have in place in order to fulfill its statutory obligations.

10:30 a.m. – 12:00 p.m.

### **Records Custodians - Kentucky Department for Libraries and Archives**

*Kentucky Department for Libraries and Archives North Central KY Regional Administrator Brian Wixom*

This training will cover basics of records management for local government agencies in Kentucky, including public record maintenance, retention, and disposal, emphasizing compliance with state regulations and retention schedules. Practical exercises and case studies will be incorporated to reinforce learning and enhance clerks' ability to apply records management and regulations effectively in their day-to-day responsibilities.

12:00 p.m. – 1:00 p.m.

### **Lunch**

1:00 p.m. – 2:00 p.m.

### **3 Part Training: Unlocking Excellence: Leadership and Team Development**

#### **Domain 2: Align Relationships – Broaden Your Perspective and Foster Authentic Connections**

*Tresane Founder David Baumgartner*

The second domain in our Unlocking Excellence: Leadership and Team Development training will focus on honing the skills needed to engage with individuals whose values and approaches may differ from our own. Through cultivating curiosity and emotional detachment, leaders learn to navigate differences constructively, broadening their perspectives while remaining true to their core values.

2:00 p.m. – 3:30 p.m.

### **Ordinances, Orders and Resolutions**

*KLC Municipal Law Attorney Megan Griffith*

This session is designed to provide a nuanced understanding of how cities implement policies through ordinances, orders, and resolutions. Learn when, how, and why we use each specific tool in the city's legislative toolbox.

3:30 p.m. – 5:00 p.m.

### **Advanced Issues with Procurement and Disposal**

*KLC Director of Municipal Law Morgain Patterson*

*KLC Municipal Law Attorney Megan Griffith*

Does your city follow the Local Model Procurement Code or General Bid? Do the procurement requirements change for federal and state grants? How can I get rid of the 10 typewriters in storage? What happens when we retire a K-9? Attendees will walk away with answers to these questions and more after this session.

**Dinner on your own.**



## Wednesday, July 17

7:00 a.m. – 8:00 a.m.

**Breakfast**

8:00 a.m. – 9:30 a.m.

**3 Part Training: Unlocking Excellence: Leadership and Team Development**

**Domain 3: Align Teams – Cultivate Shared Accountability and Optimize Performance**

*Tresane Founder David Baumgartner*

The third and final domain of Unlocking Excellence: Leadership and Team Development is where confident leaders understand the delicate balance between leading by example and managing the team, fostering a culture of shared accountability. By setting transparent expectations and defining team values, leaders empower their teams to refine their collective identity and drive optimal performance continually.

9:30 a.m. – 11:00 a.m.

**Annexation**

*KLC Director of Municipal Law Morgain Patterson*

Regional economic development is dependent upon city annexation of territory to ensure provision of necessary services including utilities, sewer, fire protection, and much more. While the basics of annexation are pretty simple, failure to comply with technical requirements can put a city's ability to assess taxes in jeopardy. This session provides an overview of past, current, and future annexation requirements.

11:00 a.m. – 12:00 p.m.

**Filing Boundary Changes**

*Kentucky Division of Geographic Information GIS Analyst Kevin Hogue*

Expanding or changing the boundaries of a city is an exciting, but complicated endeavor. The process for filing Boundary Annexations have undergone some slight changes with the inclusion of a digital file requirement upon submission. The inclusion of a digital file requirement is an important method to maintain the accuracy and integrity of the survey, as well as to expedite the process of mapping. This presentation will cover the mapping and digital file requirements of KRS81A.470 including ways to expedite the process and things that slow down the process. Lastly, the presentation will discuss resources available to in meeting the digital requirements.

12:00 p.m. – 1:00 p.m.

**Lunch**

1:00 p.m. – 2:00 p.m.

**Conducting Effective Meetings**

*KLC Director of Municipal Law Morgain Patterson*

Effective governance begins with effective meetings. Few cities are able to hire a parliamentarian to assist with handling motions and recommendations for meeting flow. In this one-hour session, we will summarize how to conduct effective meetings from open meetings requirements to Robert's Rules of Order.

2:00 p.m. – 4:00 p.m.

**Effective Communication in the Age of Artificial Intelligence**

*Communication Coach Jordyne Carmack, PhD*



This session reinforces the principles of effective communication in the workplace. Participants will identify the key elements for improving clarity in communication, explore how to communicate with different personalities, and develop strategies to optimize their interactions for maximum understanding. We'll also explore introductory Artificial Intelligence (AI) concepts and their impact on professional communication. Participants will learn fundamental principles of AI, explore practical AI tools, and examine their potential applications implementation and improved workplace communication.

4:00 p.m. – 5:00 p.m.

#### **Artificial Intelligence in City Government: Do's and Don'ts**

*Murray State University Cyber Education and Research Center Director  
Michael Ramage, PhD*

This in-depth presentation dives into the integration of Artificial Intelligence (AI) within city governance, focusing on essential guidelines for successful implementation. Through practical insights and case studies tailored to the municipal landscape, municipal clerks will gain a comprehensive understanding of the do's and don'ts when incorporating AI tools into city operations. The session equips attendees with the knowledge and strategies necessary to harness the potential of AI while mitigating risks and ensuring compliance with regulatory frameworks.

**Dinner on your own.**

## **Thursday, July 18**

7:00 a.m. – 8:00 a.m.

#### **Breakfast**

8:00 a.m. – 10:00 a.m.

#### **Financial Management**

*City of Covington Finance Director & KGFOA President Steve Webb*

A city's budget is the blueprint for its priorities and its vision, making the allocation of scarce city resources one of the most important things elected and appointed officials work through every year. City clerks will learn how a city's budget and accounting systems operate, and what roles and responsibilities a city clerk may have in this vital process.

10:00 a.m. – 12:00 p.m.

#### **Addressing Inflation and Pay Compression**

*Hanna Resource Group Chief Operating Officer Candra Bryant*

*Hanna Resource Group Director of Compensation Andrea Bevin*

Labor shortages, Kentucky's workforce participation rate, and pay compression continue to contribute to wage rates climbing higher than we've experienced in the last 40 years. This presentation will cover emerging compensation-related trends across the Commonwealth and possible compensation-related solutions to support growth across the state within an ever-evolving labor environment. Join compensation leaders from HRG to review the data needed to support your city government's compensation budgeting efforts for the upcoming year and explore innovative and practical solutions for remaining externally competitive and combatting pay compression.



12:00 p.m. – 1:00 p.m.

**Lunch**

1:00 p.m. – 3:00 p.m.

**Cemetery Management with the Kentucky Cemetery Association**

*Kentucky Cemetery Association Field Marketing Director Misti Drew*

*Kentucky Cemetery Association Board Chair Michael Higgs*

*Kentucky Cemetery Association Legal Counsel Steve Brooks*

This comprehensive session will equip clerks with valuable insights and actionable strategies to enhance their operations and drive success. First, we will dive into the legal landscape of cemetery management, offering an introduction to the KCA legal compendium and addressing commonly asked questions such as heir of ownership. Next, we'll explore the Interment Verification Process, discussing best practices, providing sample forms, and highlighting potential legal hazards. Shifting focus, our discussion on technology will explore options for digitizing records, the benefits of Customer Relationship Management software, and best practices for utilizing social media. Lastly, we'll tackle strategies for driving revenue, including navigating memorial sales, incorporating low-cost cremation items, and capitalizing on second rights.

3:00 p.m. – 4:00 p.m.

**Audit - What to Expect and How to Prepare**

*Dean Dorton Audit Management Group Director of Assurance Services  
Simon Keemer*

*Dean Dorton Audit Management Group Audit Director Joseph Overhults*

City clerks play a crucial role in the functioning of a city, ensuring the smooth operation of various administrative and legal tasks. An audit of municipalities' financial records is an important part of their annual operations. An audit can be a stressful experience especially if you are unprepared. In this session, we will discuss ways to plan for a successful audit.

4:00 p.m. – 5:00 p.m.

**Navigating the Future: Insurance and Financial Services for Municipalities**

*KLC Director of Agency Operations Jeremy Baird*

*KLC Financial Services Manager Steven Pickarski*

This multi-faceted session provides a foundational approach to navigate the evolving complexities of insurance and financial services, allowing clerks to make educated decisions and discuss city-tailored risk management strategies. It will include an overview of common insurance terms and discussion on the current landscape and trends of the insurance marketplace. In addition, this session will explore how investing as a municipal government entity has its unique challenges, advantages, and statutory requirements that KLC staff will interpret into easy-to-understand terms. This information will allow you to make informed investment decisions on behalf of your city and know what to look for as your city plans their insurance needs.

5:00 p.m. – 6:00 p.m.

**Reception**

*Sponsored By: KLC Insurance Services and Financial Services*

**Dinner on your own.**



## Friday, July 19

7:00 a.m. – 8:00 a.m.

### Breakfast

8:00 a.m. – 9:00 a.m.

### Goal Setting Part 1: Visioning

*KLC Community & Economic Development Manager Tad Long*

Visioning is a practical straight-forward process to describe the actual destination you are striving to reach. In this session, clerks will gain insight into the visioning process and how to easily make it a part of city planning and budgeting processes.

9:00 a.m. – 10:00 a.m.

### Goal Setting Part 2: Strategic Implementation

*KLC Community and Economic Development Manager Tad Long*

You have established your vision for your project or your budget. You know your destination. Strategic implementation is the step-by-step roadmap to reach your destination and fulfill your vision. Your vision will never become a reality without strategic implementation. This session will build upon the foundation established in Part 1: Visioning and guide clerks through the process of strategic implementation for their cities.

10:00 a.m. – 11:00 a.m.

### Capital Projects Strategies

*Frost Brown Todd Attorney Jason Halligan*

Developing capital projects can be one of the most expensive and high-profile activities a city government undertakes. Yet too often cities follow the same playbook without reevaluating their approach or training their staff on key issues. All strategies have tradeoffs and there is no one-size-fits-all approach. This presentation will help city clerks make informed decisions along the path of planning for and coordinating capital projects.

11:00 a.m. – 12:00 p.m.

### Clerk FAQ Session

*City of Nicholasville City Clerk & KMCA Immediate Past President Kathy Walker, MMC/KMMC*

*City of Paris City Clerk/Treasurer & KMCA Education Chair Stephanie Settles, MMC/KMMC*

Did you learn something this week that you don't fully understand? Do you have a question that wasn't answered? Are you overwhelmed with the amount of information presented? This session, hosted by experienced clerks, will provide answers to your questions and the additional information you need to go back to your city fully equipped to do your job.

12:00 p.m. – 1:00 p.m.

### KMCA Graduation Banquet