



## International Institute of Municipal Clerks

### Region 1 Annual Meeting

& Pre/Post-Annual Meeting Education Sessions

March 29-31, 2023

The Otesaga, 60 Lake Street, Cooperstown, NY 13326

Dear Fellow IIMC Region I Members,

We are so excited to be announcing that our 2023 IIMC Region 1 Annual Meeting will be held March 29-31, 2023 at *The Otesaga*, in Cooperstown, NY. Still owned by the Clark family today, The Otesaga is Cooperstown's landmark historic hotel. For more than a century, The Otesaga has combined impeccable hospitality, first-class accommodations, and fine dining. Overlooking Lake Otsego, the resort offers a grand setting where you can explore Cooperstown's rich history, vibrant food scene, and cultural attractions, including the **National Baseball Hall of Fame & Museum**.

**\*\*Make Your Room Reservation by calling The Otesaga directly at 607-547-9931 by March 10, 2023\*\***

This year's Annual Meeting and education sessions offer you the opportunity to earn up to 8.5 points towards your CMC or MMC. For those of you who are working towards your CMC or MMC designation, the 8.5 points will go a long way in helping to reach that goal. Whether you are just starting out or have need of those last few points to reach the finish line, this year's pre and post Annual Meeting educational opportunities will fit the bill. The educational line up is amazing beginning Wednesday, March 29th with our Athenian Dialogue and continuing Thursday and Friday with exceptional sessions sure to leave you wanting more! Stay around Saturday and visit the National Baseball Hall of Fame & Museum. What a treasure to be so close too!

The Athenian will be split into two days this year beginning Wednesday, March 29th at 1:00 p.m. and finishing Thursday morning. This year's book, *Luckiest Man, The Life and Death of Lou Gehrig*, by Jonathan Eig, will be facilitated by Region 1 Director Susan Haag, Town Clerk/Tax Collector for the Town of Austerlitz, New York.

For those not taking the Athenian Dialogue, we've left Thursday morning as travel time with pre-Annual Meeting educational sessions beginning promptly at 1:00 p.m. Catherine D. Donahue, our instructor, will be back with us this year teaching on how to **Build High Performing Teams in 2023**. Friday, March 31st, begins bright and early at 6:00 am with and optional IIMC Region 1 Benefit Walk/Run. If you didn't participate last year, jump on board. It's a great time of the day to get the blood flowing. The NEACTC leadership will meet for breakfast at 7:00 am.

Pre and post-Annual Meeting education sessions will follow Friday morning and afternoon, our Annual Meeting taking place during lunch. Friday night finishes off with our annual Banquet and the Tea-cup raffle, which proceeds help defray the cost of our Annual Meeting. Be sure to bring along your raffle item and spare cash to bid!

You won't want to miss visiting our Sponsors. Learn what's new; ask questions about your current systems; visit with friends and make some new ones. Sponsors will be available Thursday and Friday.

We can't wait to see everyone in Cooperstown! Make sure to register early!

Best,

*Sue and Kathy*

Susan Haag, RMC MMC  
Town of Austerlitz Town Clerk/Tax Collector  
518-392-3260 Ext 300  
shaag@austerlitzny.com

Kathleen Montejo, MMC CCM RP  
City of Lewiston City Clerk  
207-513-3124  
kmontejo@lewistonmaine.gov

*Connecticut, Maine, Massachusetts, New Hampshire, New York, Rhode Island and Vermont*



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### Athenian Dialogue

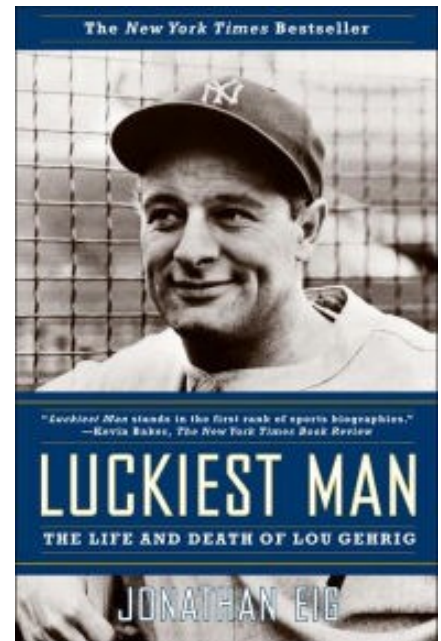
Wednesday, March 29th 1:00-5:00 p.m.

Thursday, March 30th 8:30-10:30 a.m.

### *Luckiest Man, The Life and Death of Lou Gehrig*

Written by Jonathan Eig & Facilitated by Susan Haag RMC MMC

*Join the IIMC Region 1 Municipal Clerks for an insightful and thought provoking dialogue looking to one of America's most beloved baseball players, Lou Gehrig, whose untimely death ended with a disease being named after him.*



Lou Gehrig was a baseball legend—the Iron Horse, the stoic New York Yankee who was the greatest first baseman in history, a man whose consecutive-games streak was ended by a horrible disease that now bears his name. But as this definitive new biography makes clear, Gehrig's life was more complicated—and, perhaps, even more heroic—than anyone really knew.

Drawing on new interviews and more than two hundred pages of previously unpublished letters to and from Gehrig, *Luckiest Man* gives us an intimate portrait of the man who became an American hero: his life as a shy and awkward youth growing up in New York City, his unlikely friendship with Babe Ruth (a friendship that allegedly ended over rumors that Ruth had had an affair with Gehrig's wife), and his stellar career with the Yankees, where his consecutive-games streak stood for more than half a century. What was not previously known, however, is that symptoms of Gehrig's affliction began appearing in 1938, earlier than is commonly acknowledged. Later, aware that he was dying, Gehrig exhibited a perseverance that was truly inspiring; he lived the last two years of his short life with the same grace and dignity with which he gave his now-famous "luckiest man" speech.

Meticulously researched and elegantly written, Jonathan Eig's *Luckiest Man* shows us one of the greatest baseball players of all time as we've never seen him before.

Book must be purchased and read ahead of time. **3 CMC or MMC points awarded** after completion of Dialogue Assessment which must be completed within 30 days.

*Cost to participate is \$125.00 if registering outside the Region 1 Annual Meeting.*



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### Schedule of Events

#### Wednesday, March 29, 2023

12:00-1:00 pm	Registration and Tea Cup Raffle Drop Off	Oak Room
1:00-5:00 pm	Pre-Annual Meeting Athenian Dialogue <i>Luckiest Man, Life and Death of Lou Gehrig</i> Facilitated by Susan Haag, RMC MMC Region 1 Director	Kingfisher Tower Room
3:00-3:15 pm	Break	Kingfisher Foyer
5:30 pm	Dinner On Your Own	

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#### Thursday, March 30, 2023

7:00-8:00 am	Breakfast	Glimmerglass
8:30-10:30 am	Athenian Dialogue Continued	Kingfisher Tower Room
10:30-12:30 pm	Registration and Tea Cup Raffle Drop Off	Oak Room
12:00-5:00 pm	Spend Time With Our Sponsors	Iroquois Room
1:00-3:00 pm	Pre-Annual Meeting Education Session Team Success 101: The Foundation For Effective Teams Part 1	Ballroom
3:00-3:30 pm	Break	Ballroom Rotunda
3:30-5:00 pm	Pre-Annual Meeting Education Session Team Success 101: The Foundation for Effective Teams Part 2	Ballroom
6:00 pm	Dinner	Glimmerglass

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**Friday, March 31, 2023**

<b>6:00-7:00 am</b>	<b>Region 1 Walk/Run</b>	<b>Hotel Lobby</b>
<b>7:00-8:00 am</b>	<b>NEACTC Breakfast Meeting</b>	<b>Fenimore Room</b>
<b>7:00-8:00 am</b>	<b>Breakfast</b>	<b>Glimmerglass</b>
<b>8:30-5:00 pm</b>	<b>Spend Time With Our Sponsors</b>	<b>Iroquois Room</b>
<b>8:30-10:15 am</b>	<b>Pre-Annual Meeting Education Session</b> Team Success 102: Team Communication Strategy Part 1	<b>Ballroom</b>
<b>10:15-10:30 am</b>	<b>Break</b>	<b>Ballroom Rotunda</b>
<b>10:30-12:00 pm</b>	<b>Pre-Annual Meeting Education Session</b> Team Success 102: Team Communication Strategy Part 2	<b>Ballroom</b>
<b>12:00-1:30 pm</b>	<b>IIMC Region 1 Annual Meeting and Lunch</b>	<b>Glimmerglass</b>
<b>1:30-3:00 pm</b>	<b>Post-Annual Meeting Education Session</b> Team Success 103: Your Powerful Professional Voice	<b>Ballroom</b>
<b>3:00-3:30 pm</b>	<b>Break</b>	<b>Ballroom Rotunda</b>
<b>3:30-5:00 pm</b>	<b>Post-Annual Meeting Education Session</b> Team Success 104: Difficult Conversations Not All Teams Perform Equally	<b>Ballroom</b>
<b>6:00 pm</b>	<b>Reception, Annual Banquet and Tea Cup Raffle</b>	<b>Glimmerglass</b>

Check out Optional A-la-carte Add-ons For Program Electives if you want more great lessons on Building High Performance Teams in 2023!



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## Building High Performing Teams in 2023

### Education Overview:

Effective teams are an integral component of today's workplaces. Through a series of interactive, hands on working sessions in both large and small groups, program participants will learn strategies to build and leverage teams that add value to their organizations. We will identify theory and analyze best practices from case studies and simulations "drawn from real life" to support team strengths, overcome common workplace challenges and optimize outcomes. Participants will leave the program with a "toolbox" of skills to develop and contribute to highly effective, impactful teams.

### Team Success 101 Part 1 and 2: The Foundation For Effective Teams

**Sessions 1 and 2: March 30th, 1:00-5:00 PM**

This session will explore the building blocks for highly effective, impactful teams. We will examine the role teams play in benefiting today's organizations and how teams influence the employee experience. Learn to identify components of how a successful team forms and how those steps set a team up for success. We will also explore roadblocks that can cultivate team dysfunction and learn how leadership skills contribute to overcoming common challenges.

### Team Success 102 Part 1 and 2: Team Communication Strategy

**Sessions 3 and 4: March 31st 8:30-12:00 PM**

This session will explore professional communication strategies to position your team for success and have your contribution heard. Learn the theory behind audience strategy and how to accelerate others' reception and comprehension of your message. Increase member engagement and promote team alignment and outcomes.

### Team Success 103: Your Powerful Professional Voice

**Session 5: March 31st 1:30-3:00 PM**

What role can individuals play in working towards a productive, impactful team? What can you do to set your team up for success? Explore how to manage and communicate a high-quality personal brand in a team environment.

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## Strategic Communications 104: Difficult Conversations Not All Teams Perform Equally

### Session 6: March 31st, 3:30-5:00 PM

How can you take a struggling team, or a difficult team member, and redirect them to a positive, productive outcome? Learn how to develop good news – and bad - effectively. Practice strategies to deliver a professional message for more effective feedback and constructive criticism. Session will conclude with a review of your ‘toolbox’ of skills for successful team development.

### Instructor:

**Cathleen (Cathy) D. Donahue** is a communications strategist and educator. She has partnered with over 500 organizations to grow their strength and viability through strategic planning, marketing, and communications. Cathy is a champion of coaching leaders to build strong personal and professional brands. A veteran presenter, she frequently speaks on strategic marketing and communications, planning, leadership development, and sustainability.

Cathy serves an adjunct faculty member in the School of Business Marketing Department at Central Connecticut State University (CT) where she teaches managerial communication. She serves as a member of the University’s Center for Teaching & Innovation Board of Advisors. She is also a member of the International Association of Business Communications.

Cathy holds a master’s degree in Organizational Development and Leadership from St Joseph’s University (PA) and a bachelor’s degree from the College of the Holy Cross (MA). A resident of New Milford, CT, she is an active volunteer for the Candlewood Lake Authority promoting responsible stewardship of the largest lake in the State of Connecticut.

## Follow-Up Opportunities: Optional A-la-carte Program Electives For Those Clerks Who Want A Little Extra.

### 1. Post Program Follow Up Session

- This optional 3-hour hands-on session will build on the program to address the practical application of skills and strategies developed in the Program.
- Learners will explore advanced case studies and FAQs to build confidence and understanding of leadership effectiveness skills.
- Participants will have the opportunity to “ask the expert” on challenges in implementation.

### 2. 1:1 Instructor to Learner meeting on Building (Facilitating) Effective Teams Goals

- Presenters will work 1:1 with learners to identify and assess goals relative to their individual roles.
- Instructors will reinforce SMART goal setting as well as strategies to empower teams
- Meetings are typically offered in one-hour increments and are offered live or virtually (Teams, Zoom etc.)

### 3. 1:1 Instructor to Learner meetings on Professional Leadership Communications

- Instructors work 1:1 with learners who seek improved communication skills – written or oral
- Topics can include feedback, “courageous conversations”, professionalism and/or presentations based on learner needs and interests.
- Meetings are typically offered in one-hour increments and are offered live or virtually (Teams, Zoom, etc.)



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#### Tidbits you should know....

**Tea Cup Raffle:** The Tea Cup Raffle is a fundraiser for Region 1. Annual Meeting Attendees are asked to bring an item to raffle off. Options can be a unique item from your area, something a clerk will find useful or something that we have...just because! Throughout our time together, tickets are purchased by attendees and put into the 'tea cup.' During our Banquet, a ticket is pulled for the winner of each item. The more items to raffle, the more fun we have!!

**Annual Meeting Walk/Run:** This event is another fundraiser for Region 1. Before our Annual Meeting, a route is chosen for attendees to walk, or run, Friday morning. This gives attendees time to exercise a little after sitting for long periods, and gives the opportunity to meet and network with clerks from throughout the Region. Each clerk who joins the fun will be entered into a drawing to win a special prize just for those who participate!

**Spend Time with our vendors:** You will definitely want to make sure you work in time to spend with our vendors. Many things changed during COVID and you won't want to miss what is new and exciting. Vendors available Thursday and Friday. Many of our vendors have sponsored our event, so be sure to thank them.

**NYS Tax Information:** NY Form ST-129 is required from each person claiming exemption if they are paying with cash, personal check or credit card. This form must accompany your hotel reservation request to receive tax-exempt status.

**National Baseball Hall of Fame:** The National Baseball Hall of Fame is on Main Street in Cooperstown and is in walking distance from The Otesaga. It is open everyday from 9:00-5:00 pm. Admission is \$28.00. Discounts apply for seniors and veterans.

**Additional Attractions:** Visit the Farmer's Museum or the Hero's Baseball Wax Museum; Tour the Cooperstown Beverage Trail; Have fun at Rookie's Craft House.

**Hotel Check-in and Check-out:** Check-in for The Otesaga is 4:00 pm and check-out is before noon.

**Optional Al-a-carte Add-ons:** These sessions are held at a future date. Please contact our instructor, Cathleen Donahue, for more information concerning these optional sessions.

**Bringing A Guest:** If you are bringing a guest and want to include them for meals, please see the registration form. Cost covers the notated meals only. Want local food instead? Options are within walking distance.



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### REGISTRATION FORM

Region 1 Annual Meeting FULL PACKAGE <b><i>with</i> Athenian Dialogue</b> March 29-31, 2023 (\$335.00) \$ <i>Includes Athenian Dialogue with hardy snack, Thursday Breakfast, Snack and Dinner, Friday Breakfast, Lunch, Snack and Banquet, Region 1 Annual Meeting, 8.5 Education Points if Athenian Dialogue Assessment is completed.</i>	
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**OR**

Region 1 Annual Meeting FULL PACKAGE <b><i>without</i> Athenian Dialogue</b> March 30-31, 2023 (235.00) \$ <i>Includes Thursday Snack and Dinner, Friday Breakfast, Lunch, 2 Snacks and Banquet, Region 1 Annual Meeting and 5.5 Education Points.</i>	
Region 1 Annual Meeting Friday Only March 31, 2023 (150.00) \$ <i>Includes Friday Breakfast, Lunch, 2 Snacks and Banquet, Region 1 Annual Meeting, 3.5 Education Points</i>	
Region 1 Annual Meeting Athenian Dialogue Only March 29-30, 2023 (125.00) \$ <i>Includes Athenian Dialogue and Thursday Breakfast, 3 Education Points</i>	

**ADD ONS**

Region 1 Annual Meeting Walk Run March 31, 2023 (\$30.00) \$	
Guest Meals <i>Thursday Breakfast, Snack and Dinner, Friday Breakfast, Lunch, Snack and Banquet</i> (275.00) \$ <i>Thursday Snack and Dinner, Friday Breakfast, Lunch, Snack and Banquet</i> (200.00) \$ Name of Guest: _____	

**SATURDAY FUN**

The National Baseball Hall of Fame April 1, 2023 <i>Enjoy a morning of touring the Baseball Hall of Fame reliving the great moments in baseball history, learning about those iconic legends and understanding... 'If you build it, they will come...'</i>	General Admission (\$28.00)	Pay at Venue
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**Total \$ \_\_\_\_\_**

Name:	Title:
Municipality:	Work Phone:
Email:	Cell Phone:

Make Check Payable to: **IIMC Region 1** and Mail to: Susan Haag, RMC MMC Town of Austerlitz, PO Box 238, Spencertown, New York 12165. Questions? Call 518-392-3260, Ext 300, shaag@austerlitzny.com

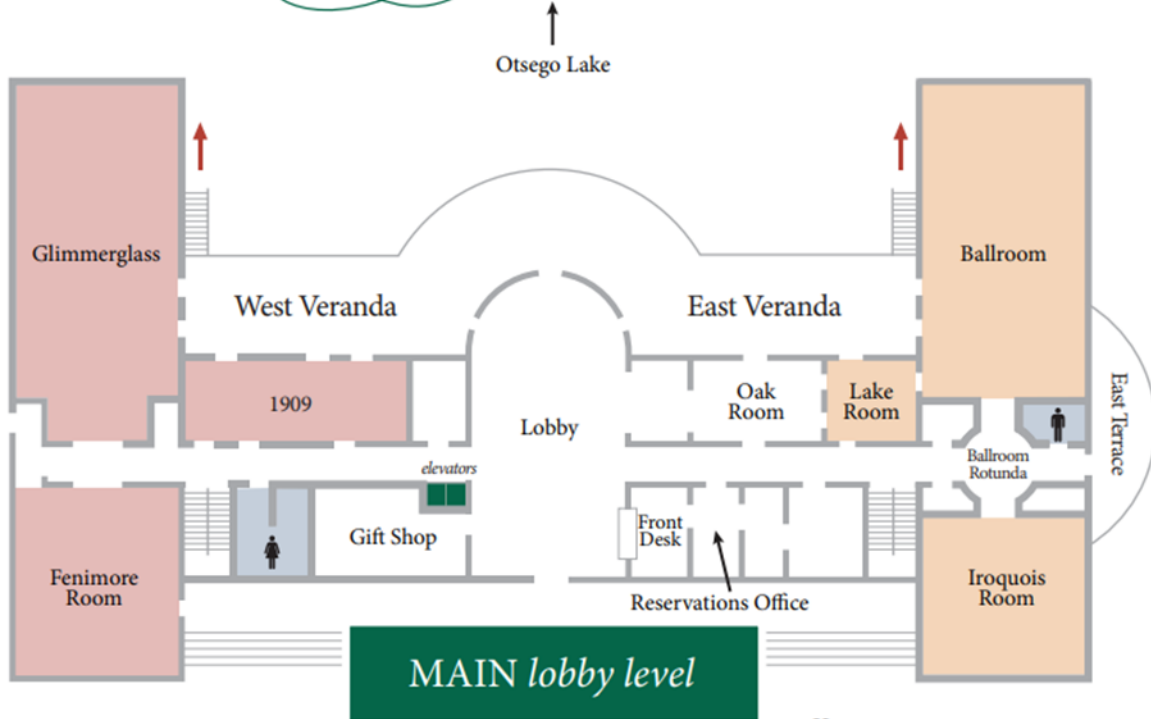
Reservations Due Date: March 10, 2023

**\*\*Make Your Room Reservation by Calling The Otesaga Directly at 607-547-9931\*\***

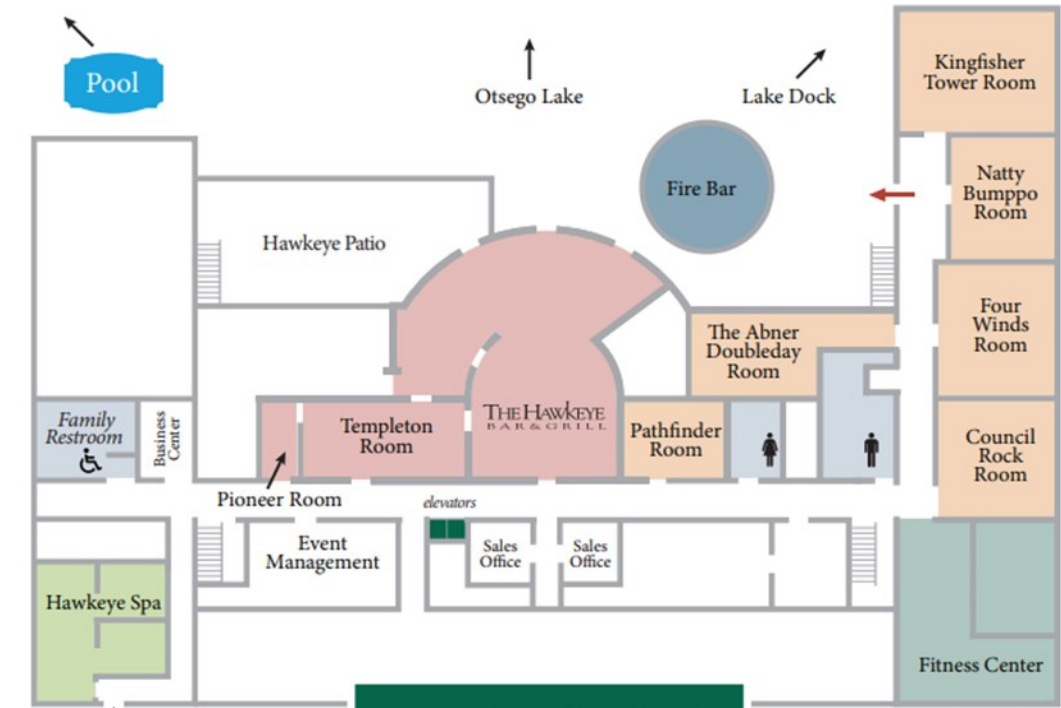
**March 10, 2023 Deadline**



# the OTESAGA Event Spaces



- Key:
- Restrooms
  - Dining
  - Meeting Space
  - Fitness Center
  - Beverage Services



- Key:
- Dining
  - Meeting Space
  - Hawkeye Spa
  - Restrooms
  - Fitness Center
  - Beverage Services
- ↑ Exit to Lake and Pool

Lower Lobby Entrance

← Leatherstocking Golf Course



Department of Taxation and Finance  
**New York State and Local Sales and Use Tax**  
**Exemption Certificate**  
 Tax on occupancy of hotel or motel rooms

**ST-129**  
 (2/18)

**This form may only be used by government employees of the United States, New York State, or political subdivisions of New York State.**

Name of hotel or motel		Dates of occupancy	
		From:	To:
Address (number and street)		City	State ZIP code Country

**Certification:** I certify that I am an employee of the department, agency, or instrumentality of New York State, the United States government, or the political subdivision of New York State indicated below; that the charges for the occupancy of the above business on the dates listed have been or will be paid for by that governmental entity; and that these charges are incurred in the performance of my official duties as an employee of that governmental entity. I certify that the above statements are true, complete, and correct, and that no material information has been omitted. I make these statements and issue this exemption certificate with the knowledge that this document provides evidence that state and local sales or use taxes do not apply to a transaction or transactions for which I tendered this document, and that willfully issuing this document with the intent to evade any such tax may constitute a felony or other crime under New York State Law, punishable by a substantial fine and a possible jail sentence. I understand that the vendor is a trustee for, and on account of, New York State and any locality with respect to any state or local sales or use tax the vendor is required to collect from me; that the vendor is required to collect such taxes from me unless I properly furnish this certificate to the vendor; and that the vendor must retain this certificate and make it available to the Tax Department upon request. I also understand that the Tax Department is authorized to investigate the validity of tax exemptions claimed and the accuracy of any information entered on this document.

Governmental entity (federal, state, or local)		Agency, department, or division	
Employee name (print or type)	Employee title	Employee signature	Date prepared

## Instructions

### Who may use this certificate

If you are an employee of an entity of New York State or the United States government and you are on official New York State or federal government business and staying in a hotel or motel, you may use this form to certify the exemption from paying state-administered New York State and local sales taxes (including the \$1.50 hotel unit fee in New York City).

New York State governmental entities include any of its agencies, instrumentalities, public corporations, or political subdivisions.

Agencies and instrumentalities include any authority, commission, or independent board created by an act of the New York State Legislature for a public purpose. Examples include:

- New York State Department of Taxation and Finance
- New York State Department of Education

Public corporations include municipal, district, or public benefit corporations chartered by the New York State Legislature for a public purpose or in accordance with an agreement or compact with another state. Examples include:

- Empire State Development Corporation
- New York State Canal Corporation
- Industrial Development Agencies and Authorities

Political subdivisions include counties, cities, towns, villages, and school districts.

The United States of America and its agencies and instrumentalities are also exempt from paying New York State sales tax. Examples include:

- United States Department of State
- Internal Revenue Service

Other states of the United States and their agencies and political subdivisions **do not** qualify for sales tax exemption. Examples include:

- the city of Boston
- the state of Vermont

### To the government representative or employee renting the room

Complete all information requested on the form. Give the completed Form ST-129 to the operator of the hotel or motel upon check in or when you are checking out. You must also provide the operator with proper identification. Sign and date the exemption certificate. You may pay your bill with cash, a personal check or credit/debit card, or a government-issued voucher or credit card.

**Note:** If you stay at more than one location while on official business, you must complete an exemption certificate for each location. If you are in a group traveling on official business, each person must complete a separate exemption certificate and give it to the hotel or motel operator.

### To the hotel or motel operator

Keep the completed Form ST-129 as evidence of exempt occupancy by New York State and federal government employees who are on official business and staying at your place of business. The certificate should be presented to you when the occupant checks in or upon checkout. The certificate must be presented no later than 90 days after the last day of the first period of occupancy. If you accept this certificate after 90 days, you have the burden of proving the occupancy was exempt. You must keep this certificate for at least three years after the later of:

- the due date of the last sales tax return to which this exemption certificate applies; or
- the date when you filed the return.

This exemption certificate is valid if the government employee is paying with one of the following:

- cash
- personal check or credit/debit card
- government-issued voucher or credit card

Do not accept this certificate unless the employee presenting it shows appropriate and satisfactory identification.

**Note:** New York State and the United States government are not subject to locally imposed and administered hotel occupancy taxes, also known as *local bed taxes*.

**Substantial penalties will result from misuse of this certificate.**