



# VMCTA 2026 Annual Conference

## Wednesday, September 9, 2026



| Time           | Location                       | Event                                                                                                    | Presenter                                              | Hours |
|----------------|--------------------------------|----------------------------------------------------------------------------------------------------------|--------------------------------------------------------|-------|
| 8:00-8:45 AM   | Gate House Lodge Mountain View | Registration / Breakfast<br>Vendor Visit/ Fundraising                                                    |                                                        |       |
| 8:45-9:00 AM   | Mt View                        | Welcome                                                                                                  | Diana Vachon                                           |       |
| 9:00-10:30 AM  | Mt View                        | <b>Self-Talk for High-Performers</b>                                                                     | Marianne Renner                                        | 1.5   |
| 10:30-11:00 AM | Courtyard Room                 | Vendor Visit/ Fundraising                                                                                |                                                        |       |
| 11:00-12:00 PM | Mt View                        | <b>Revolutionary Press &amp; 1st Amendment</b>                                                           | John Vincent                                           | 1     |
| 12:00-12:45 PM | Mt View                        | Lunch / Vendor Introductions                                                                             |                                                        |       |
| 12:45-1:45 PM  | Mt View                        | Annual Business Meeting                                                                                  |                                                        |       |
| 1:45-2:00 PM   | Courtyard Room                 | Vendor Visit / Fundraising                                                                               |                                                        |       |
| 2:00-3:30 PM   | Mt View                        | <b>Land Record Indexing Best Practices</b><br><b>Clerk: CVC Required Land Records</b>                    | Kevin Shortell & Will Flender<br><i>Peet Law Group</i> | 1.5   |
|                | Castle Rock                    | <b>Electronic Payment Reconciliation Best Practices</b><br><b>Treasurer: CVT Required Cash Mgmt</b>      | Cynthia Stoddard<br><i>NEMRC</i>                       | 1.5   |
| 3:30-3:45 PM   | Courtyard Room                 | Vendor Visit/ Fundraising                                                                                |                                                        |       |
| 3:45-5:15 PM   | Mt View                        | <b>Public Records Requests &amp; Responses</b><br><b>Clerk: CVC Required Municipal Law</b>               | Sarah Buxton<br><i>TGS Law Offices</i>                 | 1.5   |
|                | Castle Rock                    | <b>Working with Listers for a Smoother Tax Process</b><br><b>Treasurer: CVT Required Tax Collections</b> | Lisa Truchon<br><i>NEMRC</i>                           | 1.5   |
| 5:15-6:15 PM   | Castle Rock                    | Cocktails and Conversations                                                                              |                                                        |       |
| 6:15-10:15PM   | Mt View                        | Banquet in Mountain View followed by Dessert & Music at Rumbles                                          |                                                        |       |

# WEDNESDAY, SEPTEMBER 9, 2026



## SESSION A

*General Session   Mountain View   9:00 – 10:30 AM*

### **SELF-TALK FOR HIGH-PERFORMERS—KEYNOTE**

*Presenter: Marianne Renner – Leadership Coach, Speaker, Trainer*

It's easy to be a high-performer when things are going smoothly. But let's face it – how often does that happen? If you want to conquer uncertainty, conflict and constant change, start by mastering your mindset.

All day long you're having conversations. But the most important conversation is the one you're having with yourself. Better self-talk helps you think creatively, solve problems, build trust, and lead teams. This engaging program will inspire you to think differently, while offering practical steps to help you achieve new outcomes where it matters most.

Learn to:

- Identify and change unconscious behaviors that sabotage career and organizational success
- Adopt new habits that grow empowerment, engagement, and accountability
- Persevere through obstacles that seem impossible
- Develop greater influence with your teams, leaders, and other key stakeholders

## SESSION B

*General Session   Mountain View   11:00 – 12:00 PM*

### **REVOLUTIONARY PRESS & FIRST AMENDMENT**

*Presenter: John Vincent*

“We The People” are invited to learn the history of printing the American Revolution! Join letterpress printer John Vincent in conversation around an old printing press, pull a broadside, and imagine what the Next Revolution could be. When the handwritten Declaration of Independence was delivered to the local print shop the evening of July 4, 1776, it was “massed produced” on the printing press overnight. But only after it was entirely set by hand, one l-e-t-t-e-r at a time and locked up in a press bed to be pulled by hand, one copy at a time. To honor America's Semiquincentennial and soon to be Vermont's, it is important to reflect on the document that started the nation, the amendments that protect our freedoms, and our part in guiding our citizenry through freedom of speech.

# WEDNESDAY, SEPTEMBER 9, 2026



## SESSION C1

*Concurrent Session Mountain View 2:00 – 3:30 PM*

### **LAND RECORD INDEXING BEST PRACTICES**

**Clerk: CVC Required Course - Land Records**

*Presenter: Kevin Shortell & Will Flender, Peet Law Group*

This course will include topics associated with best practices for land record recording with plenty of time for questions. Covered topics will include: Certificates of Trust – when is it recorded as a separate document and when is it recorded as part of the mortgage deed; Enhanced Life Estate Deeds and Vermont Property Transfer Tax Returns (PTTR) – what to do when it looks like a direct transfer if the PTTR is not filled out correctly; Mobile Home Bill of Sale; UCCs – why do we still get them at the local level and should they be recorded in land records; Foreclosure/Dismissal of Foreclosure – what is the projected time frame from when the property is foreclosed to sale by auction, how does it impact delinquent taxes and what sequence of documents does the town clerk expect. The how-to of indexing will be peppered with stories of surprises found during title searches and an overview of what title insurance is and how it works.

## SESSION C2

*Concurrent Session Castle Rock 2:00– 3:30 PM*

### **ELECTRONIC PAYMENT RECONCILIATION BEST PRACTICES**

**Clerk: CVT Required Course - Cash Management**

*Presenter: Cynthia Stoddard, NEMRC*

This session outlines practical best practices for reconciling electronic payments accurately, efficiently, and securely. It highlights key controls such as timely transaction matching, clear exception review procedures, consistent documentation, segregation of duties, and regular reporting. By following these practices, organizations can reduce errors, identify discrepancies faster, strengthen audit readiness, and maintain greater confidence in their financial records.

# WEDNESDAY, SEPTEMBER 9, 2026



## SESSION D1

*Concurrent Session Mountain View 3:45 – 5:15 PM*

### **MASTERING PUBLIC RECORDS REQUESTS & RESPONSES**

**Clerk: CVC Required Course- Municipal Law**

*Presenter: Sarah Buxton, TGS Law Offices*

This workshop provides a practical, step-by-step framework for handling public records requests and issuing legally compliant responses under Vermont law. Key takeaways include: Statutory Compliance – master the strict 3-business-day response rule and know exactly when and how to invoke the 10-business-day extension for “unusual circumstances”; Defensible Search Protocols - Learn how to scope requests, search digital communications (including texts and personal devices used for public business), and maintain records logs; Redaction & Exemptions – Apply Vermont’s statutory exemptions correctly while adhering to the mandate that records cannot be withheld in full if redaction is possible; Fee Structure & Appeals – Charge properly under the Uniform Schedule of Public Record Charges and structure written determinations to minimize appeal and litigation risk.

## SESSION D2

*Concurrent Session Castle Rock 3:45 – 5:15 PM*

### **WORKING WITH LISTERS FOR A SMOOTHER TAX PROCESS**

**Treasurer: CVT Required Course - Tax Collections**

*Presenter: Lisa Truchon, NEMRC*

This session explores how clear communication and collaboration with listers can make the tax process more efficient, accurate, and predictable. Participants will learn practical ways to coordinate information, resolve common issues early, and support a smoother workflow from property review through final assessment and billing. The synopsis highlights the importance of shared timelines, consistent documentation, and a cooperative approach that helps municipalities reduce errors, answer taxpayer questions more confidently, and keep the process moving.



# VMCTA 2026 Annual Conference

## Thursday, September 10, 2026



| Time           | Location                     | Event                                                                                            | Presenter                                                              | Hours |
|----------------|------------------------------|--------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|-------|
| 8:00-8:45 AM   | Gate House<br>Mountain View  | Registration / Breakfast / Vendor Introductions<br>Vendor Visit/ Fundraising                     |                                                                        |       |
| 8:45-9:00 AM   | Mt View                      | Welcome                                                                                          | Diana Vachon                                                           |       |
| 9:00-10:30 AM  | Mt View                      | <b>Beyond the Job Description:<br/>Growing Together as Municipal<br/>Clerks &amp; Treasurers</b> | Tracy Borst &<br>Georgette Wolf-<br>Ludwig                             | 1.5   |
| 10:30-11:00 AM | Mountain View &<br>Courtyard | Assistants Network / Vendor Visit/ Fundraising                                                   |                                                                        |       |
| 11:00-12:30 PM | Mt View                      | <b>Practical AI for a Modern<br/>Municipality</b>                                                | Omer Trajman                                                           | 1.5   |
| 12:30-1:30 PM  | Mt View                      | Lunch and Raffle Drawings                                                                        |                                                                        |       |
| 1:30-2:30 PM   | Mt View                      | <b>Clerk Round Table</b>                                                                         | Rosie Laquerre<br>Forrest Holzapfel<br>Deb Tanguay<br>Jenny Willingham | 1     |
|                | Castle Rock                  | <b>Treasurer Round Table</b>                                                                     | Sue Gage<br>Bob Champagne-Willis<br>Heather Roberts                    | 1     |
| 2:30-4:00 PM   | Mt View                      | <b>Working Through Differences to<br/>Build Stronger Communities<br/>Together</b>                | Will Eberle                                                            | 1.5   |
| 4:00 PM        |                              | <i>Now that you are Re-Energized - Safe Trip Home!</i>                                           |                                                                        |       |

Total Class Hours: 10  
Potential VMCTA Educational Points: 5  
Potential IIMC Points: 2.5 CMC or 2.5 MMC

# THURSDAY, SEPTEMBER 10, 2026



## SESSION E

*General Session Mountain View 9:00 – 10:30 AM*

### **BEYOND THE JOB DESCRIPTION: GROWING TOGETHER AS MUNICIPAL CLERKS & TREASURERS**

*Presenters: Tracy Borst, VMCTA and Georgette Wolf-Ludwig, VMCTA*

This highly interactive professional development session is designed for municipal clerks and treasurers at all stages of their careers. Through facilitated discussion, peer learning, self-reflection, and interactive activities, participants will explore the personal and professional qualities that contribute to exceptional public service.

Participants will identify the characteristics of outstanding municipal professionals, reflect on their own leadership and workplace practices using the Start-Stop-Continue continuous improvement framework, and learn from the collective experience of colleagues from municipalities of varying sizes and levels of experience. The session encourages participants to examine behaviors that strengthen customer service, leadership, communication, resilience, and professional effectiveness while building valuable professional connections.

Learning is reinforced through small-group discussion, audience participation, an interactive knowledge review, and individual reflection designed to produce practical strategies that participants can immediately apply in their offices.

## SESSION F

*General Session Mountain View 11:00 – 12:30 PM*

### **PRACTICAL AI FOR A MODERN MUNICIPALITY**

*Presenter: Omer Trajman*

Artificial intelligence has evolved from a simple conversational assistant into an active operational partner. This session introduces municipal clerks and treasurers to the shift toward Agentic AI – systems capable of managing and executing complex, multi-step workflows autonomously. Through practical demonstrations and collaborative discussions, participants will explore how to direct these intelligent agents to streamline daily operations and enhance public service. The goal is to leave with a clear framework for orchestrating these tools to save time, increase efficiency, and build a more responsive local government.

# THURSDAY, SEPTEMBER 10, 2026



## SESSION G1

*Concurrent Session Mountain View 1:30 – 2:30 PM*

### CLERK ROUND TABLE

*Panelist: Rosie Laquerre, CVC, Town of East Montpelier*

*Panelist: Forrest Holzapfel, Town of Marlboro*

*Panelist: Deb Tanguay, MMC, CVC, Town of Coventry*

*Panelist: Jenny Willingham, Town of Winooski*

A roundtable panel discussion is an invaluable course that offers a multitude of educational opportunities for clerks to learn from other clerks about all the nuances of the job. Topics may include legislative updates, elections, green burials, licensing, ethics and policies. It is also a time to learn about the mentoring and resources programs afforded new clerks.

## SESSION G2

*Concurrent Session Castle Rock 1:30 – 2:30 PM*

### TREASURER ROUND TABLE

*Panelist: Sue Gage, Town of Brandon*

*Panelist: Bob Champagne-Willis, CVT, Advanced Level 1, Town of Maidstone*

*Panelist: Heather Roberts, Town of Hinesberg*

A roundtable panel discussion is an invaluable course that offers a multitude of educational opportunities for treasurers to learn from other treasurers about all the nuances of the job. Topics may include legislative updates, cash management, fraud concerns, ethics and policies. It is also a time to learn about the mentoring and resources programs afforded new treasurers.

## SESSION H

*General Session Mountain View 2:30 – 4:00PM*

### WORKING THROUGH DIFFERENCES TO BUILD STRONGER COMMUNITIES TOGETHER

*Presenter: Will Eberle*

This session will give participants tools that improve their ability to communicate and collaborate effectively with residents, constituents, patrons, clients, friends, family, and strangers who hold different beliefs, come from different lenses of "lived experience" with mental health, addiction, and poverty challenges. This session will reduce stigma and improve outcomes when attempting to work with the public at large or known "difficult people" in your personal life.