MCTI CURRICULUM: CORE COMPETENCIES

Levels and Forms of Government  5.0 Hours
• Overview of federal and state government; outlining which agencies local governments use or should use a resource
• Overview of local government (Home Rule, powers and duties, etc.)
• Different forms of local government and organizational structure for each (municipalities, counties, special purpose districts and school districts)
• Intergovernmental cooperation; how to partner with other governments and agencies
• Funding sources and how it is spent

Municipal Law  7.0 Hours
• State laws affecting municipalities; current legislative update
• How a bill becomes law
• FOIA (preparing public notices/advertisements of council meetings and other official functions; handling public information/media requests)
• Municipal ordinances, resolutions, proclamations (definitions, how to file, codification, etc.)
• Annexation laws and responsibilities
• Difference between state law and municipal ordinances and how these affect the operation of local government

Role of the Clerk and Meeting Administration  7.0 Hours
• Parliamentary procedure
• Other strategies for conducting effective meetings
• Agendas and minute writing (what is required in law, best practices)
  • Preparing/distributing agenda packets for council meetings and other official meetings
  • Transcribes and prepares council meeting and other official city/town meeting minutes (when these documents must be made available to media – before or after they become officially adopted at next meeting?)
  • Publishes and indexes council meeting and other official city/town meeting minutes
• Clerk as part of executive/management team

Records Management  5.0 Hours
• State and local record management/retention requirements and schedules
• Overseeing the codification of ordinances into the municipal code (questions to ask your vendor)
• Certifying and recording municipal documents
• File/maintain official municipal records and public documents
• File/maintain personnel records of municipal employees and job applicants
• Developing record retention schedules, filing and retrieval systems (when and how to do back-ups, imaging, computerized records, microfilm, etc.)
• Maintaining historical record of municipal activities
### MCTI Curriculum: Core Competencies

<table>
<thead>
<tr>
<th>Section</th>
<th>Hours</th>
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<td><strong>Human Resource Management</strong></td>
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<tr>
<td>- Labor/employment law affecting employment practices (value of labor attorneys)</td>
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<td>- Benefits and retirement programs</td>
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<td>- IRS/state tax reporting and filing requirements</td>
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<td>- Workers' Compensation</td>
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<tr>
<td>- Processing personnel actions for city/town employees (hiring, termination, salary increases, benefits etc.)</td>
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<td>- Enforcing personnel policy</td>
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<td>- Recruiting interviewing, hiring, firing, performance appraisals</td>
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<tr>
<td><strong>Financial Management</strong></td>
<td>5.0</td>
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<td>- Sound public financial management practices</td>
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<td>- Investments</td>
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<td>- Financing tools (MID, TIF, hospitality, accommodations taxes, etc.)</td>
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<td>- Financial reports</td>
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<tr>
<td><strong>Basic Budgeting</strong></td>
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<tr>
<td>- Fiscal management (responsibilities of elected officials and staff)</td>
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<td>- Budget preparation responsibilities among varying forms of government</td>
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<td>- Legal requirements</td>
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<td>- Budget cycle (preparing, planning, expenditures and revenues)</td>
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<td>- Adopting amending the budget</td>
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<td>- Budget implementation</td>
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<td>- Review financial controls and reporting</td>
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<td>- Material resources</td>
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<tr>
<td><strong>Basic Accounting</strong></td>
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<tr>
<td>- Financial accounting, reporting and auditing</td>
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<td>- Fund accounting</td>
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<td>- Governmental funds</td>
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<td>- Governmental fund budgetary issues</td>
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<td>- Transaction examples</td>
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<td>- Proprietary funds</td>
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<td>- Fiduciary funds</td>
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<td>- Revenue accounting</td>
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<td>- Expenditure accounting</td>
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<tr>
<td>- Basic financial statements (balance sheets, income statements)</td>
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<td>- Internal controls</td>
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<td>- Governmental auditing</td>
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<td>- Fixed asset management</td>
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<tr>
<td><strong>Payroll Administration</strong></td>
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<td>- Payroll preparation</td>
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MCTI CURRICULUM: CORE COMPETENCIES

- Employment tax filing
- IRS and state tax reporting and filing requirements

Technology in the Workplace 7.0 Hours
- Merging technologies to assist in performing job functions
  - Credit card payments (state contract)
  - Imaging, computerized records, microfilm, paperless council meetings
- Technology infrastructure (role of IT person, technology assessment, building IT into the budget)
- Computer skills (using various software applications)
- Websites

Ethics 5.0 Hours
- State ethic laws
- Ethical decision making
- Ethical responsibilities of the clerks and treasurers
  - Receiving filings of candidates for public office
  - Conducting city/town elections
  - Processing personnel actions for city/town employees (hiring, termination, salary increases, benefits etc.)
  - Enforcing personnel policy
  - Preparing requests for bids for products or services
  - Resolving citizen complaints/concerns

Written Communication 3.5 Hours
- Composing correspondences, letters, emails and other documents
- Types of correspondences, letters and other documents
- Business writing

Interpersonal/Human Relations Skills 10.5 Hours
- Handling public information/media requests
- Handling stress
- Effective teams
- Management skills
- Listening skills
- Professional – being the “face” for your town/city

Decision Making 3.5 Hours
- Decision making processes
- Understanding relationships between symptoms
- Generating alternatives
- Decision factors/evaluation
- Key players/influencers in the decision making process
**MCTI CURRICULUM: CORE COMPETENCIES**

**Customer Service**
- Resolving citizen complaints/concerns
- Conflict resolution
- Telephone etiquette
- Internal/external customer service skills
- How to respond to diverse personalities

7.0 Hours

**Election Administration**
- Overview of election state law
- State laws affecting municipal elections (filings, etc.)
- How to conduct city/town elections and special elections
- Receiving filings of candidates for public office
- Conduct of candidate election (method of elections)
- Conduct of election day
- Timeline illustrating key milestones and filing dates for municipal elections
- Municipal election ordinances

3.5 Hours

**Business License Administration**
- Definition of Business License – what it is and isn’t
- State Law Authorizes – must use gross receipts
- Franchise – difference b/w business license
- Non-taxable Businesses and Limitations
- Primary Use – raise funds; Secondary Use – regulation.
- Reasonableness
- Council adopts, license officials must interpret.
- Doing Business – how to determine.
- Classifications
- Gross Income – how to determine, what to exclude and include – burden is on taxpayer to prove exemption.
- Rates and Fees – NO FLAT FEES (except as base fee), prorate annexations
- Office Procedures – FOIA, good records, violations should be dealt with promptly set procedures to match office/municipality size.
- Enforcement – Do not renew future license, issue ordinance summons, assessments.
- Income verification methods (require tax returns at renewal, sales tax list, building permits, audits).
- Revocations – Limited power, business can still operate, long process
- Basic overriding rule is what is in municipality’s ordinance
- Difficult Applications – Always use resources of handbook, list serve, and peers

3.0 Hours

**Procurement**
- Definitions and key terms
- Procurement policies/ordinances
- Preparing and sending out requests for bids for products or services
- Opening bids for products or serviced

1.5 Hours

**Time Management**
- Basic time management

2.5 Hours
MCTI CURRICULUM: CORE COMPETENCIES

• Prioritization tools
• Identifying and reducing time wasters

**Risk Management**

- Introduction to Risk Management (*Steps - Identify, Evaluate, Implement, Monitor; Techniques - Avoidance, Loss Control, Risk Retention, Risk Transfer*)
- Definitions and key terms
- Knowledge of risk management practices (strategies for clerks/treasurers to encourage departments to implement these practices)
- Where insurance fits into the risk management framework
- Coverage basics - workers compensation, property, liability
- Safety in the workplace
- Using personal vehicles for work purposes
- Special issues facing local government
- Law Enforcement
- Special Events
- Hold Harmless and Indemnification Agreements
- Bid, Public Officials, Performance, Material & Payment Bonds
- Recent Legal Updates

**Negotiation/Collaboration Skills**

- Negotiating with council/coworkers/city manager
- Power of persuasion with employees, council and other key influencers
- Negotiating contracts with vendors

**Public Speaking**

- Oral presentation skills
- Public speaking skills
- Understanding your audience
- Reading body language
- When to use Power Point presentations

**Grants Administration**

- Preparing grant applications
- Preparing grant reimbursement requests
- Where to find grants
- Managing grants
- Grant agreements
- What gets funded
- Key elements to writing a grant

**Notary Public**

- Duties of a notary

2.0 Hours

3.5 Hours

3.5 Hours

1.5 Hours

1.0 Hours

4/20/2009
MCTI CURRICULUM: CORE COMPETENCIES

- Certifying and recording city/town documents
- Performing notary public functions
- Qualifications to become a notary
- Application process
- Electronic notarizations
- Do’s and Don’ts
- State Certification for International transactions
- State law updates