



Georgia Clerks  
Education Institute



Carl Vinson Institute of Government  
UNIVERSITY OF GEORGIA

**2019 Course Schedule**  
**and**  
**Class Descriptions**

## 2019 Course Schedule

Although we strive to offer classes as published, please keep in mind that classes and/or dates listed below may change due to unforeseen circumstances. Any changes to the schedule will be reflected on registration forms for individual training events.

### 2019 Georgia Clerks Education Institute Class Schedule

April 26-27	ACCG Conference  Savannah		Day 1: Required, Elective, and Masters  Day 2: Continuing Education
		Day 1	Government 102 (required, 6 hours)  Professional Skills Development 202 – Diversity and Motivation (elective, 6 hours)  Continuous Improvement and Productivity (Masters', 6 hours)
		Day 2	Human Resources 301 (continuing education, 3 hours)
May 13-14	GCEI Regional Training Rome, GA		Day 1: Required Day 2: Required Elective/continuing education
		Day 1	Records Management 101 (required, 6 hours)
		Day 2	Records Management 102 (required, 3 hours) Records Management 103 (required, 3 hours)  Professional Skills Development 203: Time/Stress Management (elective or continuing ed., 6 hours)

June	GMA Conference	Savannah	
		Friday	Meeting Management 102 (required, 3 hours)
		Saturday	Ethics and the Public Servant (Master's, 6 hours) Government 101 (required, 6 hours)
		Sunday	Meeting Management 103 (required, 3 hours)
		Monday	Tax Revenue 202 (elective, 3 hours)
July			NONE
August 6-7	GCEI Regional Training  UGA Gwinnett		Day 1: Required Elective/continuing education Day 2: Elective/continuing education
		August 6	Government 102 (required, 6 hours)
		August 6	Tax Revenue 201 (elective or continuing ed., 6 hours)
		August 7	Payroll Administration (elective or continuing ed., 6 hours)
September 8-10  Sunday – 8th Monday – 9th Tuesday – 10 <sup>th</sup>	GCEI Conference	Georgia Center Athens	
		Monday	<b><u>Required:</u></b> Government 101
		Tuesday	Professional Skills Development 101 (Business Writing)
		Sunday-Tuesday	Mandated Orientation
		Tuesday	Meeting Management 101 (6 hours)
		Monday	Millage Rate Process
		Monday	Records Management 101 (6 hours)

			<p><b><u>Electives:</u></b></p> <p>Tuesday Government 201 (6 hours)</p> <p>Tuesday Professional Skills Development 203 (time/stress management) (6 hours)</p> <p>Monday Public Operations 202 (6 hours)</p> <p><b><u>Continuing Education:</u></b></p> <p>Monday-Tuesday Purchasing (12 hours, also being offered in Local Finance Officer Certification Program)</p> <p>Monday Cutting Edge Workshop: Topic TBD (6 hours)</p> <p>Tuesday Financial Oversight (6 hours)</p> <p><b><u>Masters Ed. Mgmt. Development Program</u></b></p> <p>Monday Managing Power Effectively</p> <p>Tuesday Advanced Change Management</p> <p>Sunday-Tuesday <b><u>Masters' Project Independent Study</u></b></p> <p>Sunday-Tuesday <b><u>MEGS</u></b></p> <p><b><u>Local Finance Officers Certification Program</u></b></p> <p>Monday-Tuesday Purchasing (12 hours)</p>
October	none		
November 7-8	GCEI Regional	Albany	<p>Day 1: Required</p> <p>Day 2: Required</p> <p>Elective/continuing education</p>
		November 7	Meeting Management 101 (required, 6 hours)
		November 8	Professional Skills Development 204 (group dynamics, elective or continuing education, 6 hours)
		November 8	<p>Community and Media Relations 101 (3 hours)</p> <p>Community and Media Relations 102 (3 hours)</p>

December 2019			None

## **Course Descriptions**

### **Required Courses (81 hours)**

#### **Community and Media Relations 101 – 3 hours**

As a city/county clerk, you may be the front line of contact between government and the community. Such contact might involve everyday citizens or media requests. Navigating these interactions can be a delicate process, but also a critical one in the interest of government transparency. In the required course Community and Media Relations, you will learn methods for building a good working relationship with the various media in our jurisdiction with the goal of keeping your public informed about your government. Additionally, you will learn how to appropriately involve media in both daily communications and meetings. Examples of these applications will include virtual meetings, teleconferencing, doodle surveys, and texting/website interactions from constituents.

#### **Community and Media Relations 102 – 3 hours**

As a city/county clerk, social media may be a popular and effective method for building relationships with the community. This required course will cover the many applications of social media that can be used to build bridges with constituents. You will explore the potential and risks of a variety of social media outlets (i.e. Facebook, Twitter, Instagram) in government, and how such tools can be effective community outreach strategies. With each instruction of this course, the most recent forms of social media will be covered, so as to stay current with this evolving communication method.

#### **Finance 101 – Budgets and Fiscal Management – 6 hours**

Local governments rely on sound budgeting and fiscal management for decision making and operations. Clerks fill various roles and responsibilities in the budget process and in the daily financial management of the local government. This class will give you an opportunity to take a look at basic principles, practices, and sources of financing for local governments; understanding the budget process (timelines, legal requirements, and so on); definitions and fundamentals of budgeting and accounting principles and the politics of the budgeting process; and understanding the billing and collection practices for local government.

#### **Government 101 – 6 hours (May also be offered as two 3-hour blocks of instruction.)**

In their critical supporting role to City Councils and County Commissions, Clerks must have a strong knowledge of basic government services, operations, and regulations. In Georgia, local government takes varying forms and the services offered to citizens may also vary. In this

required course, Clerks will learn the key aspects of how governments function and how different government personnel work together with other organizations to fulfill missions and achieve effective operations.

### **Government 102 – 6 hours**

Beyond the basic knowledge to help facilitate government functioning, clerks must contribute in many more tangible ways toward government progress. This second required course on the practices of government shifts focus to creating policy, ordinances, contributing to city charters, resolutions, and proclamations. Other issues considered in Government 102 include the management of these documents, as well as greater perspectives on boards, commissions, and authorities

### **Mandated Training – 15 hours**

The course will satisfy the legislative mandate for clerks appointed on or after April 1, 1992. Participants must attend class for the entire two and half days to satisfy the mandate. The courses are open to any clerk needing more information about the basics of the clerks' profession. The following topics will be covered: public administration/personnel overview; minute taking/record keeping (Georgia Open Records Act); agenda setting and meeting administration; and codes, ordinances and resolutions.

### **Meeting Management 101 (agendas and minutes) – 6 hours**

Much of government's progress is made through formal meetings, and clerks play an instrumental role in their facilitation from advertising notices through record-keeping. A clerk's procedural knowledge and skill might make the difference between an extremely productive meeting and one that impedes governance. In this required course, clerks will acquire in-depth knowledge and skills regarding the proper methodology for preparing agendas and minutes. This required course will lead a discussion on the different approaches used by clerks for preparing agendas and recording minutes for public meetings and hearings.

### **Meeting Management 102 (procedures) – 3 hours**

To further underscore the importance of meetings in facilitating governmental progress, clerks must continue to acquire in-depth knowledge and skills regarding the many policies and procedures involved. This additional required course concerning meeting management explores greater procedural and legal aspects of meetings, including the instrumental Roberts Rules of Order. Further issues of consideration are covered, such as technology in meetings.

### **Meeting Management 103 (open meetings) – 3 hours**

Much of government's progress is made through formal meetings, and clerks play an instrumental role in their facilitation from advertising notices through record-keeping. A clerk's procedural knowledge and skill might make the difference between an extremely productive meeting and one that impedes governance. This required course is designed to improve skills in conducting effective meetings. It examines the application of the Open

Meetings Act and Sunshine Law to address the required openness of such meetings. Finally, this course will touch on ADA requirements and how to best implement media and technology.

**Millage Rate Process – 6 hours (May also be offered as two 3-hour blocks of instruction.)**

The Georgia Millage Rate process is a complex and sometimes confusing topic, but is nevertheless a process of utmost importance to local government citizens and property owners. City/county clerks must be highly educated on the Millage Rate as part of their financial management skills set. This required course serves as an exhaustive look into property taxation by any specific jurisdiction, including transparency with the general public about this process, the actual tax collection procedures, and tips to reading and understanding a real tax bill.

**Professional Skills Development 101 (business writing) – 6 hours**

From an email to a report, city/county clerks will always be responsible for preparing correspondence for local government that involves technical writing. This required course will refresh your writing skills for the office and offer some tips to improve your written correspondence. Take this required course to review the most common mistakes and practice clear, concise well-organized writing.

**Professional Skills Development 102 (ethics) – 6 hours**

Public servants are required to make decisions that will affect fellow citizens in a variety of ways. As trustees of the people, elected officials should make every effort to create an atmosphere of public trust. Because public policy decisions may require thinking and acting differently from private/personal decisions, it is important that county commissioners understand and examine their legal, moral, and ethical public sector obligations. This core course will describe key principles of public sector ethics and will examine the range of consequences for public servants when ethical decision-making is in question including public perception/appearance, liability, and impropriety.

**Records Management 101 (open records) – 6 hours**

Records management is an integral job task for city/county clerks. As gatekeepers to these records, clerks must have a good understanding of the procedures for accessing and providing these records in response to record requests. This required course aims to help city/county clerks understand the nature of open record requests and associated laws with such procedures. Additional concerns will be addressed, such as the Freedom of Information Act and tort law relevance to records management.

**Records Management 102 (techniques) – 3 hours**

Records management is an integral job task for city/county clerks. Although central to this position's requirements, the sheer magnitude of records to maintain and keep organized can be overwhelming. Furthermore, the procedures and laws regarding records management restrict the

practices regarding records immensely. This required course aims to help city/county clerks understand the nature of record management and proper maintenance techniques.

### **Records Management 103 (technology) – 3 hours**

Records management is a job task intertwined with technology. Digital record maintenance is a necessary approach for city/county clerks, and the best methodology for these practices is constantly evolving. This required course aims to help city/county clerks understand the best practices for applying technology to records management.

## **Elective Courses (20 hours)**

### **Council/Commission and Staff Relations – 6 hours**

The relationship between the council or commission and the staff has a direct impact on the efficiency and effectiveness of local government operations. The clerk's position is unique in that it represents an important connecting point between elected officials and staff members. In this elective course, the organizational and interpersonal factors that shape that relationship will be explored. Clerks will have the opportunity to reflect on the commissioner/council-staff relationship in their local government while considering techniques to improve or sustain a positive, productive relationship. Expected roles and interactions by clerks with elected officials and staff, forms of government, and effective communication methods will be covered.

### **Elections 201 – 6 hours**

City/county clerks are expected to assist to different degrees in local elections, depending on the jurisdiction. Regardless of the nature of these tasks, a basic understanding of conducting local elections is essential. This required course reviews the basics of running an election, campaign disclosure rules, and procedures that will help you administer a successful election. In addition, this course will cover the important considerations before and after elections to help clerks become knowledgeable in election requirements and policies, as well as the specific procedures for referendums, bonds special elections, and recalls.

### **Elections 202 – 6 hours**

City/county clerks are expected to assist to different degrees in local elections, depending on the jurisdiction. In many cases, these clerks may have to help facilitate elections in a number of ways. This elective course reviews the basics of running an election, as well as campaign disclosure rules.

### **Government 201 (government law) – 6 hours**

Although a basic governmental course is offered in the required curriculum, city/county clerks



may hope to develop a more in-depth understanding of governmental processes and support systems. As clerks' roles include increasing responsibility and autonomy, it may be especially important to accrue a greater knowledge of the legal ramifications of governmental processes.

This elective course covers many topics of navigating government legal considerations, as well as taking the proper approaches toward interpreting and securing legal documents.

### **Government 202 – 6 hours**

Local governments look and operate differently throughout our state. This class will explore form and function in the definition of local government, history of local and state forms and function, why cities and counties do what they do, the creation of federal forms and their functions, city and county services, constitutional officers, recent changes in laws that facilitate more regional and inter-governmental service delivery, and a review of HB 489. It will also provide a brief introduction to comprehensive planning and policy making processes.

### **Government Accounting – 15 hours**

Many city/county clerks will be tasked with budgeting and accounting roles for their local government offices and jurisdictions. In addition to the required financial management courses, a solid foundation of general accounting skills may be particularly useful for clerks placed in such roles. This elective course gives a helpful overview of the basic premises of accounting, including the measuring, processing, and reporting of government's financial information. This course will also address the rules outlined by the Governmental Accounting Standards Board (GASB) as well as the generally accepted accounting principles (GAAP) and rules.

### **Human Resources 201 – 6 hours**

As city/county clerks' roles continue to expand, many may be tasked with an assortment of human resources responsibilities within local government offices. Such responsibilities may include designing performance appraisal systems, assisting with staffing decisions, and handling employee discipline and discharge. This elective course prepares clerks for these additional responsibilities to help foster effective human resources functioning.

### **Human Resources 202 – 3 hours**

As city/county clerks' roles continue to expand, many may be tasked with an assortment of human resources responsibilities within local government offices. Such responsibilities may include assessing risk management, administering employee wages and benefits, and reviewing employee handbooks. This elective course prepares clerks for these additional responsibilities to help foster effective human resources functioning.

### **Human Resources 203 – 6 hours**

This course will build on the topics covered in the Human Resources 201 & 202 course,

elaborating on more intermediate approaches to these human resources facets. City/county clerks with increased human resources responsibilities would learn a deeper understanding of these topics through this elective course.

### **Payroll Administration – 6 hours**

To complement elective courses on the expanding role of city/county clerks in human resources responsibilities, as well as financial management, the facilitation of payroll in government offices has become an increasingly popular task to master. Clerks are more likely to be responsible for management payroll for entire government offices, and thus understanding the nuances of these systems may be critical. This elective course will cover the procedures and guidelines behind payroll systems, as well as best practices and instructional approaches to electronic payroll processing systems.

### **Professional Skills Development 201 (customer service/conflict resolution) – 6 hours**

To continue the development of managerial skills for city/county clerks, this elective course covers a common occurrence in conducting relationships with the general public. Customer service is often at the root of many interactions with constituents for clerks, and such interactions may span between problem solving and conflict resolution. As government's role is to serve its constituents, this course is designed to cover strategies for both problem solving and conflict resolution scenarios, with both sets of skills essential for effective management in any contexts.

### **Professional Skills Development 202 (diversity and motivation) – 6 hours (May also be offered as two three-hour blocks of instruction.)**

In an effort to continue the management development of city/county clerks, this elective course is built on the premise of the many powerful differences employees may have in a work context. Specifically, understanding and tapping the full potential of such differences will lead to an effective workforce and government. Management Development 202 begins by covering a modern approach to diversity and inclusion in the workplace, not only touching on traditional nuances of race and gender diversity, but also considering the increasing prevalence of cultural and generational diversity of the workforce. Related to this first theme, the course explores motivational techniques for today's managers, many of which built on the notion of understanding such important differences of the workforce.

### **Professional Skills Development 203 (time/stress management) – 6 hours**

A common theme among our course offerings is the ever-expanding role of the city/county clerk. Clerks are expected to perform deeper and increasingly broad sets of job duties for their governments, and while such increasing autonomy can feel empowering, these workloads can be overwhelming! This elective course offers personal management techniques to help mitigate the stress of one's work responsibilities. Specifically, time management strategies are shared with students to better address these expanding roles, as well as stress management techniques to cope with the effects of a heavy workload.

### **Professional Skills Development 204 (group dynamics and adapting to change) – 6 hours**

Managing individuals is not sufficient for the leader in the modern workforce. Although not every employee prefers working on projects with others, this is an integral aspect of government, and management must be able to facilitate these teams to achieve success. City/county clerks' management development continues in this elective course by exploring the nature of group dynamics in the government workplace, with specific emphasis on how to understand the groups you're leading and how to guide them toward success. Leading as a participant in this groups is critical as well, and this course will cover such advanced leadership topics that arise in difficult times.

### **Professional Skills Development 205 (project management) – 6 hours**

City and County Clerks must develop project management skills as more and more complex and varied assignments such as budget preparation and detailed reporting are added to their workloads. This elective course will continue Clerks' management development by providing instruction and practice in creating functional, understandable budgets; designing clear, engaging presentations; or writing precise, comprehensive reports that will produce effective results for today's government workplace.

### **Professional Skills Development 206 (management and leadership style) – 6 hours**

Regardless of official title or their number of direct reports, city/county clerks will always need to bring leadership to their roles in local government. Such management skills should never be taken for granted, and must be refined based on the challenges of each task and each individual's leadership styles. This required course will help you understand your management style and how your personality affects your work performance in making decisions, collecting information, organization, and more. Participants will complete a personality assessment instrument.

### **Public Operations 201 – 6 hours**

Government entities thrive through their collaborations with public operations units. As city/county clerks increase their skills and responsibilities in tackling larger projects with increased responsibility, it's critical for an increased understanding of the roles of these "eyes," "ears," and "arms" of a functioning government. This elective course begins with an overarching explanation of each public operations entity available to governments and clerks. Such entities encompass public safety, public works, and utilities.

### **Public Operations 202 – 6 hours**

Building on the first elective course considering public operations, this elective gives city/county clerks a more strategic overview of public operations and their roles within government. In the spirit of comprehensive planning, Clerks must understand the overarching community development goals with planning and zoning, as well as economic development strategy. Greater relationships with public operations entities will be facilitated once clerks gain a better understanding of such strategic approaches.

### **Public Operations 203 – 6 hours**

Building on the first elective course considering public operations, this elective gives clerks a more strategic overview of municipal courts and their roles within government. Clerks will learn the nature of these courts in handling smaller, but frequent, offenses such as traffic offenses, city ordinances, and misdemeanors. Greater relationships with public operations entities will be facilitated once clerks gain a better understanding of such operations.

### **Purchasing – 12 hours**

As city/county clerks engage in increased decision-making and responsibilities within their local governments, purchasing decisions are all but inevitable. Understanding the nature of purchasing by government entities can be complicated, but these procedures are instrumental to making sound and responsible decisions. This elective course covers such issues related to purchasing decisions that may be facilitated by clerks. Topics include requests for proposals (RFP), requests for quotations (RFQ), proposals and bids, government deals, and cooperative purchasing agreements.

### **Save/E-Verify – 6 hours**

Beginning in 2006, Georgia's General Assembly passed significant legislation related to immigration issues and the requirements for local governments to comply with the Systematic Alien Verification Entitlements (SAVE) program and the Federal Work Authorization program (E-Verify). Effective January 1, 2012 additional complex requirements were enacted. This course will assist you as you navigate the changing climate of immigration compliance and provide key updates for your jurisdiction regarding compliance and reporting.

### **Tax Revenue 201 – 6 hours**

As part of a series of elective courses to further educate city/county clerks in financial management responsibilities, this course serves to cover the more nuanced tax issues that arise for local governments. Taxes come in many shapes and sizes from many sources, and can be used to aid governmental endeavors in a number of ways. However, the variety of taxation sources can seem endless. This course is designed to address several of these sources that may prove most relevant to the job duties of clerks, including occupational and alcohol license taxes, and others.

### **Tax Revenue 202 (case study/practicum) – 3 hours**

As part of a series of elective courses to further educate city/county clerks in financial management responsibilities, this course provides an instructional case study to teach the facets of SPLOST/LOST/MOST guidelines. After reviewing these revenue sources, clerks will engage in a group activity case study exploring real situations which might incorporate them into government initiatives.

### **Tax Revenue Webinars – 1 hour**

These online webinars allow clerks to get on-demand access to job related information on topics of importance, including occupational tax, alcohol license, different use categories, and so on.

### **Advanced Courses**

**(Continuing education. These classes do not count toward the clerk's certificate.)**

#### **Bill to Law Process – 3 hours**

To further city/county clerks' knowledge of government and general management practices, this advanced course is designed to better illustrate the process of how a particular idea in government goes through the (sometimes lengthy) process of becoming a bill, and subsequently a law. Because clerks are often key facilitators of government processes, this knowledge may prove to be instrumental toward maintaining an efficient legislative process by local governments.

#### **Business Writing II – 6 hours**

Building on the Business Writing course in the required curriculum, this advanced course is intended for clerks who hope to improve their writing skills in preparing documents particularly common for government projects. Not only will the writing style of Business Writing I be reinforced, but the actual content of these documents will be reviewed. Documents included in this course will be grants, press releases, and bids, to name a few.

#### **Comprehensive Plans – 3 hours**

Comprehensive planning is an integral aspect of government with regard to public policy, land use, allocation of resources, and so on. It often dictates the overarching future of any particular jurisdiction, and for this reason, it's critical to create Comprehensive Plans with great care and attention to detail. Because city/county clerks are likely to have an increasing role in this process, this advanced course seeks to build on the overview of Comprehensive Plans in the required government courses. Specifically, the course will provide a detailed review of identifying issues, stating goals, collecting data, and then preparing and creating an appropriate plan for both 5- and 10-year outlooks.

#### **Cutting Edge Workshops – 3 or 6 hours**

In an effort to maintain a relevant curriculum and keep up with the “cutting edge” issues that pertain to city/county clerks and local government, this advanced course seeks to pick “hot issues” that have recently become pertinent to clerks which may not be covered in the base curriculum. Topics and instructors will likely vary each conference rotation, but may include information security, credit card security, HIPAA privacy and security compliance, Affordable Care Act compliance, expanding broadband usage, grant writing processes, government audits, and GAAP updates, among other areas.

### **Debt Administration – 6 or 12 hours**

Depending on a clerk's role in his/her government office, documenting debt issuance may be a necessary skill. Understanding the circumstances for governments issuing debt and the processes for these circumstances is critical. This advanced course will cover these issues thoroughly, as well as the role of bonds and their ratings in the interest rate process. Other related issues will also be covered, such as GAAP rules, TAN, and revolving loan funds.

### **Emergency Management – 3 hours**

When disaster strikes, it's critical that government takes a proactive role in its duty to serve the people. In an emergency, the need for strong leadership and emergency management is greater than ever, and city/county clerks are undoubtedly part of facilitating this leadership process. This advanced course will cover a variety of emergency situations that may befall local jurisdictions, action plans before and after these scenarios, and local/national agencies that may provide aid during disaster.

### **Financial Oversight – 6 hours**

In line with much of the curriculum's emphasis on an increasing financial role expected of clerks, this advanced course addresses the imperative need for financial oversight in government, and specifically how clerks can do their part to ensure this. Clerks will learn the nature of a guide to compliance auditing, as well as the best methodology to prepare for internal and external audits.

### **Human Resources 301 – can be offered as 3-hour class or 6-hour class**

The class will center on discussion of appropriate file maintenance including Georgia Open Records Act, personnel files, I-9s and so on. Other topics include employee incentives, recognition and awards, and positive communication.

### **Human Resources 302 – 3 hours**

In the course, students will learn about employee health, wellness, and safety programs. Performance management will also be discussed.

### **Human Resources 303—Current Topics – 3 hours**

This class will cover current hot topics in human resources as it relates to responsibilities of clerks.

### **Intergovernmental Agreements – 3 hours**

Coordination and collaboration across government entities is key to overarching governmental

functioning within states. Georgia clerks representing a wide range of geographies and constituencies should learn the nature of intergovernmental agreements and their tax implications in order to help facilitate these processes. The advanced course covers the nature of intergovernmental agreements, the types of agreements that may take place, their associated policies, and tax implications.

### **Revenue Administration – 6 or 12 hours**

Revenue administration is a key driver of many government initiatives. The clerk's role in these complex processes is larger than ever, and this advanced course aims to provide a thorough summary of many revenue sources. Clerks will learn about current trends in governmental revenue administration, the sources of this revenue, the policies used to generate revenue, and how the funds may be administered.