



# Georgia Clerks Education Institute



Carl Vinson Institute of Government  
UNIVERSITY OF GEORGIA

## Clerks Certification Guidelines

## **Programs Offered by the Georgia Clerks Education Institute**

- ✚ State Mandated Training
- ✚ Georgia Certified Clerk
- ✚ Advanced Management Certificate (Masters Education Management Development Program)
- ✚ Masters Education Graduate Seminar (MEGS)
- ✚ Continuing Education

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## **Georgia Clerks Education Institute Certificate Program Overview**

The Georgia Clerks Education Institute Certificate Program for city and county clerks is administered by the University of Georgia's Carl Vinson Institute of Government. The program includes the following elements:

1. State Mandated Training for clerks
2. Certification as a Georgia Certified Clerk

3. Advanced Management Certificate (Masters Education Management Development Program)
4. Masters Education Graduate Seminar (MEGS)
5. Continuing Education

## **Program Objectives**

The Georgia Clerks Education Institute Certificate Program for city and county clerks is designed to establish minimum standards and professional goals for city and county clerks. The program seeks to accomplish this by:

- Introducing new methods and approaches to enable clerks and finance officers to become more efficient and effective in their positions.
- Increasing managerial competence of city and county clerks to meet new challenges and demands placed on local government.
- Creating the opportunity for clerks to further their professional development to gain the recognition they deserve.

## **Who should attend?**

The Georgia Clerks Education Institute is designed for city clerks, county clerks, and other professionals performing city or county clerk duties in local government.

## **State Mandated Training for Clerks**

State law (O.C.G.A. § 36-1-24 and § 36-45-20) requires anyone holding the title of clerk or performing the duties of a municipal clerk or county clerk pursuant to the local charter, ordinance, or code shall attend and complete a course of training on matters pertaining to the basic performance of his or her official duties. Mandated training is offered at Georgia Clerks Education Institute programs, and the 15-hour mandated training course counts toward the 101 hours required for certification as a Georgia Certified Clerk.

*2014 Georgia Code, Title 36 - LOCAL GOVERNMENT PROVISIONS APPLICABLE TO COUNTIES ONLY. Chapter 1 - GENERAL PROVISIONS*

*OCGA 36-1-24 - Training classes for clerks of governing authority of county*

(a) Any person hired or appointed to serve as the clerk of the governing authority of any county in this state shall attend and complete a course of training on matters pertaining to the basic performance of his or her official duties. Such training shall be conducted by the University of Georgia under the supervision of the Carl Vinson Institute of Government at such time and place as shall be determined by the Carl Vinson Institute of Government.

(b) The personnel of the Carl Vinson Institute of Government are authorized to work with the members of the

Association County Clerks of Georgia and the Association County Commissioners of Georgia in establishing and operating the training course provided for in subsection (a) of this Code section, as well as establishing the rules and regulations governing attendance of such training.

(c) All reasonable expenses of attending the training class required by this Code section shall be paid from funds appropriated by the county governing authority for such purposes.

*2014 Georgia Code, Title 36 - LOCAL GOVERNMENT PROVISIONS APPLICABLE TO MUNICIPAL CORPORATIONS ONLY, Chapter 45 - MUNICIPAL TRAINING, Article 2 – CLERKS OF GOVERNING AUTHORITIES OF MUNICIPALITIES*

*OCGA 36-45-20 - Training course*

(a) For purposes of this article, the term "clerk of the governing authority of a municipality" means an individual holding the office of city clerk pursuant to a municipal charter and who is normally employed in that capacity for 40 hours per week.

(b) Any person hired or appointed to serve as the clerk of the governing authority of a municipality shall attend and complete a course of training on matters pertaining to the basic performance of his or her official duties. A city official who is an acting city clerk or who carries the dual responsibilities of both city manager and city clerk is exempt from such training.

(c) The personnel of the Carl Vinson Institute of Government are authorized to work with the members of the Georgia Municipal Clerks and Finance Officers Association and the Georgia Municipal Association in establishing and operating the training course provided for in subsection (b) of this Code section.

(d) All reasonable expenses of attending the training course required by this Code section shall be paid from funds appropriated by the municipal governing authority for such purposes.

## **Certification Requirements for Clerks**

To earn the credentials of Georgia Certified Clerk, clerks must complete the program curriculum for municipal clerks and county clerks (see Certificate Program Curriculum Section on pages 11-14).

The Georgia Clerks Education Certificate Program consists of 101 hours of instruction in public administration (relevant to the job of clerk). Two Georgia Clerks Education Institute conferences offering courses for the certification program are offered yearly. In addition to the two yearly conferences, the Georgia Clerks Education Institute will provide additional training at regional locations throughout Georgia several times per year. Finally, some clerks' training courses are offered at GMA and ACCG events that may contribute to course completion for certification.

To receive the designation of Georgia Certified Clerk, a candidate must:

1. Successfully complete courses and written assessments, which consist of applying knowledge gained in each course to practical local government situations.
2. Serve two years in a local government administrative position.

**ANY RECORDS, CERTIFICATES, OR DOCUMENTATION EARNED TOWARDS RECERTIFICATION IS THE SOLE RESPONSIBILITY OF EACH CLERK TO**

**MAINTAIN.**

*Carl Vinson Institute of Government does not maintain records towards recertification.*

## **General Certification Information**

Credit hours are awarded upon the successful completion of each course assessment, and those hours are recorded on the participant's personal record towards certification (provided the class taken was part of the Georgia Clerks Certificate Program curriculum). If the class is not listed on the curriculum and is not taught at a Georgia Clerks Education Institute event or designated by the institute director as an approved clerk's training class at a GMA, ACCG, GMCA, GCCA, or other approved training event, it will not be recorded on the participant's completion check (transcript). All clerks, including those already certified, are required to take and pass the exam for any local finance certification class. All clerks, including those already certified, are required to complete each course assessment in order to have those hours forwarded to IIMC.

## **Presentation of Certification Award**

Upon successful completion of the certification requirements, the candidate for certification will receive a certificate with the seal of the University of Georgia. The candidate will join other clerks to be recognized during a general session of the Georgia Clerks Education Institute in February or September. Each clerk will be contacted by the Georgia Clerks Education Institute director after completion of the certification requirements to make arrangements for recognition at the event of the clerk's choosing from the list above. Each clerk should notify the appropriate representative(s) of the employing organization of the professional achievement they have earned.



## **Assessment for Certification in Georgia Certified Clerks Program**

1. Assessments will be administered following completion of each course of those clerks working toward certification.
2. Assessments will be required of all clerks (including those already certified) pursuing continuing education credit towards re-certification with IIMC. (i.e., those planning to use the hours earned in any class to submit to IIMC for recertification). This includes required, elective, and advanced courses.
3. Exams will be required of all clerks (including certified) when taking any classes that are noted as also meeting requirements for the “Local Government Finance Certification.”
4. Upon successful completion of assessments, credit hours will be granted to the student.  
For
2. those individuals who do not complete the assessment, credit will not be given.
5. To get credit for a course, a participant must attend the entire course and score 70 percent or higher on the test administered at the end of the course. Participants who do not pass the test are entitled to one retest. A second failure will require the participant to repeat the course.
6. All exams are graded by the Georgia Clerks Education Institute director. Students will be notified of their grade within five business days of completion of each course. The Institute director will coordinate with the participant for the administration of any necessary retesting. Retesting will be completed not later than 10 business days of the completion of the course.
7. Any participant who wishes to appeal the scoring of a course exam may do so, in writing, within 15 business days of the completion of the course. Appeals shall be filed with the Institute director, and the Institute director will review the appeals with the Joint Advisory Committee. The Joint Advisory Committee shall review the content of the appeal and make recommendations to the Institute director regarding the resolution of the appeal. The Institute director shall make the final decision regarding any appeal. The participant will be notified of the final decision of the Institute director within 20 days of the completion of the course.

## **Continuing Education/Recertification**

Participants who have earned their Georgia Certified Clerk certificate must complete 30 hours of additional training every three years to maintain their status as a Georgia Certified Clerk. The Carl Vinson Institute of Government shall not be responsible for the maintenance of these records. The maintenance of the required documentation supporting the 30 hours of continuing education is the sole responsibility of the participant. It is recommended that participants attend at least one Georgia Clerks Education Institute event per year to ensure that the 30 hours of necessary training are met.

## **Education/Certification Advisory Committee**

The Joint Education/Certification Advisory Committee provides guidance to the Georgia Clerks Education Institute director and program coordinator. Serving on the Education/Certification Advisory Committee shall be one representative from the Georgia Municipal Association, one representative from ACCG, three municipal clerks/finance officers appointed by the president of the Georgia Municipal Clerks Association, and three county clerks appointed by the president of the Georgia County Clerks Association.

Specific areas of guidance of the Education/Certification Advisory Committee are:

- Review continually the educational needs of the city clerks and county clerks and provide advice to the programs to meet those needs.
- Ensure that certification programs conform to the curriculum standards of the International Institute of Municipal Clerks.
- Recommend additional training opportunities in conjunction with Georgia Clerks Education Institute programs,
- Recommend additional training class offerings to be conducted outside of Georgia Clerks Education Institute.
- Serve as a review committee if necessary to review an appeal submitted by a clerk enrolled in the certification program.

## **Scholarships**

The Georgia County Clerks Association, the Georgia Municipal Clerks/Finance Officers Association, and the Carl Vinson Institute of Government offer scholarships for Georgia Clerks Education Institute programs, as well as for other training opportunities. Information regarding the application process for conference scholarships is disseminated with the applicable registration materials. In addition, participants may contact an officer of the appropriate association to obtain more information and to request an application for the respective association's scholarship opportunities. Information regarding GMCA scholarships can be found at <http://www.gamunicipalclerks.com/>. Information regarding GCCA scholarships can be found at <http://www.georgiacca.com/>.

### **Carl Vinson Institute of Government Clerks' Scholarship Information**

Pending the availability of funds, two scholarships shall be awarded semi-annually at the September and February Georgia Clerks Education Institute conferences in accordance with approved criteria for qualified applicants.

Clerks desirous of attaining Georgia Clerks Education Institute Program certification shall meet the following criteria to be eligible to receive a scholarship from CVIOG for the Clerks Certification Program:



1. Be a city clerk or county clerk and a member of the Georgia County Clerks Association or the Georgia Municipal Clerks Association.
2. Complete the required application (available online during open registration for conferences at [www.cviog.uga.edu/clerks](http://www.cviog.uga.edu/clerks))
3. Attach with the application supporting documentation indicating the need for financial assistance
4. Submit a letter from the scholarship candidate's chairman or mayor, city manager or county manager, council member or board member expressing support of the local governing authority for student's attendance at that particular training program, affirming that funding is not available for such training through the local government. For more information, contact Claire Kinane, program coordinator for Georgia Clerks Education Institute at [kinane@uga.edu](mailto:kinane@uga.edu) or (706) 542-3887.

## **Scheduling**

Two Georgia Clerks Education Institute conferences are held each year to ensure the scheduling of various course topics that meet the requirements of the curriculum and the needs of a majority of municipal clerks and county clerks participating in the certification programs. The total number of hours earned by attending any Georgia Clerks Education Institute program will vary with the types of courses scheduled. On average, most clerks earn 12-15 hours at each Georgia Clerks Education Institute event. In addition to the two Education Institute conferences each year, the Georgia Clerks Education Institute will provide additional training at regional locations throughout Georgia at two times throughout the year, as well as online learning options.

## **Registration**

Program information and registration forms for Georgia Clerks Education Institute events will be available for download on the Carl Vinson Institute of Government web site [www.cviog.uga.edu/clerks](http://www.cviog.uga.edu/clerks) approximately eight to ten weeks prior to the date of the program's start date. Although every effort is made to accommodate those who desire to participate, class size must be limited to room availability and also to promote an effective learning environment; therefore, registrations will be processed on a first-come, first-served basis. Every effort is made to keep registration fees held to a minimum, consistent with the needs of the program. All fees must be paid in advance. Checks should be made payable to the University of Georgia.

## **Application for IIMC Certification**

Georgia Clerks Education Institute classes meet certain requirements for the International Institute of Municipal Clerks certification program. IIMC will review each candidate's record independently after an appropriate IIMC application has been submitted.

The following are the requirements for obtaining the Certified Municipal Clerk (CMC)

designation:

1. Perform the core duties of a municipal clerk by serving a Legislative government body (LGB) in an administrative capacity with management responsibilities, which would include four of the following. Deputy clerks must perform at least four of the eight core duties:
  - Custody of the official seal and execution of official documents
  - General management
  - Records management
  - Elections
  - Meeting administration
  - Management of by-laws, Articles of Incorporation, ordinances or other legal instruments
  - Human resources management
  - Financial management

2. Be an active member of IIMC for two years.

NOTE: Members are encouraged to enroll in the certification program and begin submitting for points even if this membership requirement has not been fulfilled.

3. Affirm and practice the IIMC Code of Ethics.
4. Submit the application for admission along with the \$50 non-refundable enrollment fee

Please consider this form your *Enrollment Form* into the CMC program.

5. Complete and submit an application for CMC designation accompanied by the required supporting documentation. Please consider this your *Point Request Form*. For more information on what this form is and why it is needed [click here](#).
6. Attain 60 points in the Education category.
7. Attain 50 points in the Experience category.

IIMC awards education points on a pro-rated basis for courses offered in Georgia as follows:

- IIMC approved institute and academy classes (Georgia Clerks Education Institute) are awarded one point per two in-class contact hours.
- Subject to pre-approval by IIMC through their course review process, state association courses and IIMC region meeting classes are awarded one point per four in-class contact hours.
- Other courses an individual applicant identifies in their geographic area (not institute or state association programs) may be submitted by the individual for pre-approval by IIMC. If approved, such classes are awarded one point per six in-class contact hours.

For more information, write the International Institute of Municipal Clerks, 8331 Utica

Avenue, Suite 200, Rancho Cucamonga, CA 91730, call (909) 944-4162, or visit their website at [www.iimc.com](http://www.iimc.com).

## **Certificate Program Curriculum**

The curriculum below is to be followed by candidates who enrolled in the certificate program **after February 2015**. Requirements: 81 hours required classes, 20 hours electives

<b>Required Classes</b>	<b>Hours</b>
Community and Media Relations 101	3
Community and Media Relations 102	3
Finance 101	6
Government 101	6
Government 102	6
Mandated Orientation (Clerks Profession, Government Law Overview, Records Retention, Agendas , Minutes, Open Meetings/Records)	15
Meeting Management 101	6
Meeting Management 102	3
Meeting Management 103	3
Millage Rate Process	6
Professional Skills Development 101	6
Professional Skills Development 102	6
Records Management 101	6
Records Management 102	3
Records Management 103	3
<b>Total hours</b>	<b>81</b>

<b>Electives (20 hours required Georgia; 40 hours required IIMC)</b>	<b>Hours</b>
Council/Commission and Staff Relations	6
Elections 201	6
Elections 202	6
Government 201	6
Government 202	6
Government Accounting	18
Human Resources 201	3
Human Resources 202	3
Human Resources 203	6
Payroll Administration	6
Professional Skills Development 201 (conflict resolution/customer service)	6

<b>Electives (20 hours required Georgia; 40 hours required IIMC) (cont'd)</b>	<b>Hours</b>
Professional Skills Development 202 (diversity and motivation)	6
Professional Skills Development 203 (time/stress management)	6
Professional Skills Development 204 (group dynamics and adapting to change)	6
Professional Skills Development 205 (project management)	6
Professional Skills Development 206 (mgmt. and leadership style)	6
Public Operations 201	6
Public Operations 202	6
Public Operations 203	6
Purchasing	6
Save E-Verify	6
Tax Revenue 201	6
Tax Revenue 202	3
Tax Revenue Webinars	1

<b>Advanced courses (continuing education)</b>	
<b>Credit for the classes listed below does not apply to the Clerks' Certificate Program. These courses are for continuing education only.</b>	
Bill to Law Process	3
Business Writing II	6
Comprehensive Plans	3
Cutting Edge Workshops	3
Debt Administration	6 or 12
Emergency Management (may also count as elective)	3
Financial Oversight	6
Human Resources 301	3 or 6
Human Resources 302	3
Human Resources 303	3
Intergovernmental Agreements (may also count as elective)	3
Revenue Administration	6 or 12

The curriculum below is to be followed by candidates who enrolled in the certificate program **before February 2015** (i.e., grandfathered). Requirements: 81 hours required classes, 20 hours electives

<b>Required Classes</b>			
<b>Old Title</b>	<b>Hours (old)</b>	<b>New Title</b>	<b>Hours (new)</b>
Community and Media Relations	6	Community and Media Relations 101	3
		Community and Media Relations 102	3
Budgets and Fiscal Management	6	Finance 101	6
n/a		Government 101 (new)	6
n/a		Government 102 (new)	6
Mandated Orientation (Clerks Profession, Government Law Overview, Records Retention, Agendas , Minutes, Open Meetings/Records)	15	(same) Mandated Orientation (Clerks Profession, Government Law Overview, Records Retention, Agendas, Minutes, Open Meetings/Records)	15
Agendas and Minutes	6	Meeting Management 101	6
Managing Meetings/Meeting Administration	6	Meeting Management 102	3
		Meeting Management 103 (new)	3
n/a		Millage Rate Process (new)	6
Business Writing	6	Professional Skills Development 101	6
Ethics and Values	6	Professional Skills Development 102	6
Records Management (open records and retention)	6	Records Management 101	6
n/a	3	Records Management 102 (new)	3
		Records Management 103 (new)	3
Conflict Resolution	6	(has moved to the electives pool as Professional Skills Development 201)	
Group Dynamics	6	(has moved to the electives pool as Professional Skills Development 204)	
Management and Leadership Style	6	(has moved to the electives pool as Professional Skills Development 206)	
Organization and Management (policy making)	3	(has moved to the electives pool as Government 202; joined with Public Organizations)	
Public Organizations (reinventing and innovation trends)	3	(has moved to the electives pool as Government 202; joined with Organization and Management)	
	<b>81</b>	<b>Total hours</b>	<b>81</b>

<b>Electives</b>		<b>Electives</b>	
<b>(20 hours required Georgia, 40 hours required IIMC)</b>		<b>(20 hours required Georgia, 40 hours required IIMC)</b>	
<b>Old Title</b>	<b>Hours (old)</b>	<b>New Title</b>	<b>Hours (new)</b>

Elected Officials and Staff Relations	6	Council/Commission and Staff Relations	6
Elections (fundamentals of democratic elections)	6	Elections 201	6
n/a		Elections 202	6
Government Law	6	Government 201	6
1) Public Organizations (reinventing and innovation trends) and 2) Organization for Management (policy making) <i>Both were required classes. Combined into one elective for new curriculum.</i>	3 per class	Government 202	6
n/a		Government Accounting	15
Human Resources I	6	Human Resources 201	3
		Human Resources 202	3
n/a		Human Resources 203	6
Payroll Administration	6	Payroll Administration	6
1) Customer Service 2) Conflict Resolution ( <i>was a required class</i> ) <i>Combined into PSD 201</i>	6 per class	Professional Skills Development 201 (customer service/conflict resolution)	6
n/a		Professional Skills Development 202 (diversity and motivation)	6
Time Management		Professional Skills Development 203 (time/stress management)	6
Group Dynamics <i>Was a required class.</i>	6	Professional Skills Development 204 (group dynamics and adapting to change)	6
1) Microsoft Excel Basic 2) PowerPoint Basic 3) Excel Advanced 4) PowerPoint Advanced	6 per class	Professional Skills Development 205 (project management)	6
Management and Leadership Style <i>Was a required class.</i>	n/a	Professional Skills Development 206 (management and leadership style)	6
n/a		Public Operations 201	6

Electives (cont'd)		Electives (cont'd)	
Old Title	Hours (old)	New Title	Hours (new)
n/a		Public Operations 202	6
n/a		Public Operations 203	3
n/a		Purchasing	6
Save E-Verify	3 or 6	Save E-Verify	6
n/a		Tax Revenue 201	6
n/a		Tax Revenue 202	3

n/a		Tax Revenue Webinars	1
Leadership	6	n/a	0
Leading in Difficult Times	6	n/a	0
Motivating Today's Workforce	6	n/a	0
Problem Solving	6	n/a	0
Public Records Technology	6	n/a	0

**Clerks who enrolled in the certificate program prior to February 2015 please note:**

You may take any combination of new required courses and formerly required courses to arrive at the 81 required hours needed for certification, even if the former required course is now provided as an elective course. For example, the former required course entitled Group Dynamics is now provided as Professional Skills Development 204 (Group Dynamics). If you previously took this course as a required course, it counts as required credit for you. If you take it in the future as Professional Skills Development 204, you may count the class as required credit or elective credit, as needed for the completion of your certification hours. For advisement in certificate completion, please contact Claire Kinane at [kinane@uga.edu](mailto:kinane@uga.edu) or (706) 542-3887.

Advanced courses (continuing education)		Advanced courses (continuing education)	
<b>Credit for the classes listed below does not apply to the Clerks' Certificate Program. They are continuing education only.</b>			
n/a		Bill to Law Process	3
n/a		Business Writing II	6
n/a		Comprehensive Plans	3
n/a		Cutting Edge Workshops	3
n/a		Debt Administration	6 or 12
n/a		Emergency Management	3
n/a		Financial Oversight	6
n/a		Human Resources 301	3 or 6
n/a		Human Resources 302	3
n/a		Human Resources 303	3
n/a		Intergovernmental Agreements	3
n/a		Revenue Administration	6 or 12

**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**

Why do local governments look and operate differently throughout our state? In addition to exploring the history, function, and forms of local government, this class will examine why cities

and counties do what they do; the role of constitutional officers; HB 489 and other recent changes in laws that facilitate more regional and inter-governmental service delivery. This class will also provide a greater understanding of the policy making process and how you, as the Clerk, play a role in policy making in your city or county.

### **Government Accounting – 18 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 – 3 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 – 3 hours or 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 clerks' 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 (also may be offered as an elective)**

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 (also may be offered as an elective)**

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.