

# South Carolina Municipal Clerks and Treasurers Institute

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The Municipal Association of South Carolina, in partnership with the College of Charleston's Joseph P. Riley Jr. Center for Livable Communities and the South Carolina Municipal Finance Officers, Clerks and Treasurers Association, is pleased to offer the Municipal Clerks and Treasurers Institute.

Established in 1979, MCTI is a training program for municipal clerks and treasurers that has been approved by the International Institute of Municipal Clerks and the Association of Public Treasurers of the United States and Canada.

Successful completion of MCTI satisfies the education requirements for certifications offered by both IIMC and APT. To earn the necessary educational points for IIMC's Certified Municipal Clerk designation, clerks must complete the three-year MCTI curriculum and a capstone project. Those interested in pursuing APT's Certified Public Finance Administrator designation can apply select MCTI sessions toward the required educational points. More information about these two certification options can be found in this packet.

Completion of MCTI and certification through IIMC and APT better positions a municipal clerk or treasurer to succeed in an increasingly complex and challenging profession.

MCTI is designed to provide municipal clerks and treasurers with the skills critical to their respective professions. The Institute is offered in a series of six half-week (2½ day) sessions. Each year, two half-week sessions are offered—one in the spring and one during the fall. Each session is unique. While they build on one another, a participant may begin the program at any point. Participants are encouraged, but not required, to attend the sessions consecutively so that they can complete the program in three years.

# Sponsoring Organizations

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The **Municipal Association of South Carolina** is a nonpartisan, not-for-profit association representing the incorporated cities and towns of South Carolina. The Association provides elected and appointed officials with educational opportunities, technical and legal assistance, a concentrated lobbying effort in the General Assembly, insurance programs and information available through a variety of communication methods.

The **Municipal Finance Officers, Clerks and Treasurers Association** is an affiliate of the Municipal Association of South Carolina. MFOCTA is dedicated to enhancing the knowledge and raising the professionalism of its members by sponsoring seminars each year on topics of interest to municipal finance officers, clerks and treasurers.

The **Joseph P. Riley Jr. Center for Livable Communities** has served the College of Charleston and the State of South Carolina since 1978 and was renamed in 2010 to emphasize its applied and committed focus to enhancing urban life in Charleston and throughout the state. The Center carries out its mission helping to connect community needs with faculty and student research interests, facilitating the attainment and administration of grants, providing expertise and assistance to public and nonprofit organizations, and supporting several academic degrees.

For more information about the Municipal Clerks and Treasurers Institute, contact the Municipal Association of South Carolina at 803.799.9574 or visit [www.masc.sc](http://www.masc.sc) and search for "MCTI."

# Three-Year Curriculum

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The Municipal Clerks and Treasurers Institute sessions are scheduled twice a year—one in the spring and one in the fall. To graduate from MCTI, participants must complete the entire three-year curriculum. To receive the International Institute of Municipal Clerks' Certified Municipal Clerk designation, clerks must also complete a capstone project.

- **Overview of Government (7 hours)**  
An overview of government in the Palmetto State provides information on home rule, powers and duties of municipal government, forms of government and local-state relations.
- **The Municipal Clerk (7 hours)**  
The role of the clerk and what the mayor/council/manager expects are explored.
- **Financial Management (21 hours)**  
Each year seven hours of financial management courses are scheduled. Topics to be covered over the three years include budgeting, governmental accounting, cash management, risk management, purchasing and inventory control, debt management, user fees and municipal taxation.
- **Management Skills (21 hours)**  
Each year seven hours of management skills courses are offered. Topics covered in the 21 hours include employee motivation, management styles, coaching and counseling, appraising performance, managing for productivity and team building.
- **Records Management (7 hours)**  
This course provides an overview of records management including legal requirements, filing and indexing systems, office procedures, records management technology and developing records retention schedules.
- **Overview of Public Administration (3.5 hours)**  
This course addresses the basic concepts of public administration such as planning, budgeting and staffing. Current theory of public administration is covered.
- **Election Administration (3.5 hours)**  
An overview of election administration includes legal requirements and the clerk's role.
- **Conducting Meetings (7 hours)**  
This course addresses how to conduct effective meetings which includes information on taking minutes, rules of procedure, parliamentary procedure and the Freedom of Information Act.
- **Personal Development (17.5 hours)**  
Sessions cover topics such as time and stress management, public service ethics, public speaking and interpersonal communications.
- **Personnel Management (3.5 hours)**  
An overview of public personnel systems and key concepts related to personnel management.
- **Municipal Law (7 hours)**  
This course provides an over- view of municipal law and includes specific information on the writing and codification of ordinances.

# Curriculum Schedule

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## Year One (2019, 2022, 2025)

Course	Spring	Fall
Levels and Forms of Government	3.5	1.5
Role of Municipal Clerk and Meeting Administration	5.0	2.0
Financial Management		5.0
Business License Administration		3.0
Procurement	1.5	
Decision Making		3.5
Interpersonal Skills	4.5	2.5
Records Management	3.0	
Roundtable Sessions	2.5	2.5
<b>Total:</b>	<b>20 Hours</b>	<b>20 Hours</b>

## Year Two (2020, 2023, 2026)

Course	Spring	Fall
Human Resource Management	3.5	
Technology in the Workplace	3.5	3.5
Election Administration	3.5	
Basic Accounting	3.5	
Written Communication	3.5	
Interpersonal Skills		3.5
Payroll Administration		3.5
Risk Management		3.0
Time Management		2.5
Grants Administration		1.5
Roundtable Sessions	2.5	2.5
<b>Total:</b>	<b>20 Hours</b>	<b>20 Hours</b>

## Year Three (2018, 2021, 2024)

Course	Spring	Fall
Human Resource Management	3.5	
Ethics	5.0	
Municipal Law	3.5	3.5
Records Management		2.0
Public Speaking	3.5	
Basic Budgeting		3.5
Negotiation/Collaboration Skills		3.5
Customer Service	2.0	5.0
Roundtable Sessions	2.5	2.5
<b>Total:</b>	<b>20 Hours</b>	<b>20 Hours</b>

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**Total: 120 hours**

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# MCTI Frequently Asked Questions

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**Q: Am I certified once I complete MCTI?**

**A:** South Carolina does not have a state certification. Certification is granted by either the International Institute of Municipal Clerks or the Association of Public Treasurers. Graduating from MCTI and completing a capstone project are requirements for attaining the IIMC designation.

**Q: How long does it take to complete MCTI?**

**A:** To complete MCTI in the shortest amount of time, you should attend the six consecutive sessions offered over a three-year period. Each session is 2½ days.

**Q: What happens if I miss a session?**

**A:** You must make up the session the next time it is offered. Each session is offered once every three years.

**Q: Does my attendance at MFOCTA and BLOA meetings count toward MCTI graduation?**

**A:** No. Once you are certified, you may apply hours attending MFOCTA and BLOA meetings toward the experience components of the Certified Municipal Clerk and Certified Public Finance Administrator designations. Additionally, once you have obtained your CMC, hours attending MFOCTA and BLOA meetings may be applied toward the requirements of IIMC's Master Municipal Clerk designation.

**Q: Why doesn't my transcript reflect attendance at Municipal Association of SC or SC Municipal Finance Officers, Clerks and Treasurers Association meetings?**

**A:** MCTI transcripts only reflect MCTI courses. Staff can provide attendance information for other meetings. Up-to-date transcripts are available online at [www.masc.sc](http://www.masc.sc).

**Q: Does the capstone project requirement apply to everyone?**

**A:** No. The capstone project is a tool approved by IIMC to assess the knowledge and skills acquired by MCTI participants that wish to apply the 120-hours of MCTI instruction toward the education requirements of the CMC designation. MCTI participants who are not pursuing the CMC designation are not required to complete a capstone project.

**Q: Should I pursue my CMC or CPFA?**

**A:** If you are a municipal clerk or someone who performs a majority of municipal clerk duties, you should seek the CMC certification. If you are a treasurer or someone whose job consists of finance-related duties, you should pursue the CPFA certification. A few clerk-treasurers have elected to pursue both certifications.

**Q: Once I get my CMC, am I required to be recertified?**

**A:** No. Once you obtain your Certified Municipal Clerk designation, you may retain the CMC without any additional continuing education requirements.

**Q: How do I know if I am a member of IIMC or APT?**

**A:** You must contact those organizations directly. The Municipal Association and the College of Charleston do not keep membership records for the national organizations.

# National Certification Options

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Municipal clerks and treasurers in South Carolina have two national certification options. These certifications are awarded by the International Institute for Municipal Clerks and the Association of Public Treasurers of the United States and Canada. South Carolina does not have a state certification program. Listed below are the certifications available and a brief listing of the requirements. To learn more about these certifications, visit IIMC's website at [www.iimc.com](http://www.iimc.com) and APT's website at [www.aptusc.org](http://www.aptusc.org).

## IIMC's Certified Municipal Clerk Designation

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- This designation is awarded by IIMC and is for those individuals who spend at least 50 percent of their time on clerk-related duties. Refer to a CMC application for more details.
- Individuals must accumulate 60 education and 50 experience points to apply for their CMC.
- Graduation from MCTI and completion of a capstone project constitutes 60 education points. See the capstone project information for details on this requirement.
- Work experience and completing other education/training programs (i.e. MFOCTA meetings) contribute to the 50 experience points needed.
- There are various methods for earning both education and experience points. To obtain a copy of the CMC application, visit [www.iimc.com/index.aspx?nid=126](http://www.iimc.com/index.aspx?nid=126)
- Applicants must be an IIMC member for at least two years before being eligible for the CMC designation. However, applicants can begin accumulating points before reaching the two-year membership requirement.
- Applicants must complete an application for admission and an application for designation.

## APT's Certified Public Finance Administrator Designation

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- This credential is awarded by APT and applies to those individuals who spend a majority of their time on finance, treasury, investments or debt activities.
- Applicants must accumulate a total of 100 points consisting of a combination of education and experience points to apply for the CPFA certification.
- Graduation from MCTI constitutes 30 educational points.
- To obtain a copy of the CPFA application, visit [aptusc.org/accreditations/cpfa](http://aptusc.org/accreditations/cpfa)
- Applicants must be a member of APT for at least two years before being eligible for the CPFA designation.
- To maintain the certification, the individual must earn 50 points in a combination of education and experience credits every five years.

# Scholarship Application

Sponsored By South Carolina Municipal Finance Officers, Clerks and Treasurers Association

**Note: you must be a member of the SC Municipal Finance Officers, Clerks and Treasurers Association to receive the scholarship.**

## Personal Information

Name: \_\_\_\_\_

Home address: \_\_\_\_\_

List active memberships in government-related organizations: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

List all workshops and conferences attended in the past two years related to municipal government:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Have you attended past sessions of the Municipal Clerks and Treasurers Institute?

Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, list dates attended: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Current Position

Municipality: \_\_\_\_\_

Address: \_\_\_\_\_ Business phone: \_\_\_\_\_

Business fax: \_\_\_\_\_ Business email: \_\_\_\_\_

Title or position: \_\_\_\_\_

Description of present duties: \_\_\_\_\_

Percentage of your time during last year spent in municipal clerk or treasury activity: \_\_\_\_\_

Number of years employed in municipal government work: \_\_\_\_\_

## Employment Record

Dates	Title or Position	Company	City, State
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

## Benefits Expected

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What benefits do you hope to derive from attending the SC Municipal Clerks and Treasurers Institute?

Why are you are applying for the MCTI scholarship?

## Commitment

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**If given the scholarship, I plan to complete all sessions of the Institute as they are offered during the next three years.**

Applicant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**I will fully support the financial and time commitment required under this program.**

Employer's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Title: \_\_\_\_\_

## General Information

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Applicant must be an MFOCTA member. If selected, applicant must be willing to complete the three-year course; the majority of an applicant's job duties must be related to municipal clerk or treasury duties; and the applicant's municipality must be fully supportive of the financial and time commitment required under this program.

Remit to: MCTI Scholarship | PO Box 12109 | Columbia, SC 29211