

Municipal Clerks and Treasurers Institute

Year 3 | Session B
January 29 – 31, 2025

Cambria Hotel Columbia Downtown – The Vista | Columbia, SC

Wednesday, January 29

- 7:30 – 8:00 a.m.** **Registration and Continental Break**
- 8:00 – 8:15 a.m.** **Welcome**
- 8:15 – 11:45 a.m.** **The Municipal Budget From Preparation to Execution**

Naomi Reed, Field Services Manager, Municipal Association of SC

One of the most crucial aspects of managing city finances is making projections about the future and crafting a budgetary framework from beginning to end. This session will discuss and analyze goal setting, revenue and expenditure estimates and budget execution. *Basic Budgeting (3.5 hours)*

11:45 a.m. – 1:00 p.m. Lunch

1:00 – 2:00 p.m. **Municipal Annexation in South Carolina**

Charlie Barrineau, Field Services Manager, Municipal Association of SC

Municipal annexation requires the attention of clerks and finance officials at every step of the process. Learn the challenges that annexation presents, from verifying petitions to analyzing financial impacts, and how to manage these challenges. *Municipal Law (1 hour)*

2:00 – 2:15 p.m. **Break**

2:15 – 4:45 p.m. **Customer Service: Inside Out**

Jeanne D'Orleans, Trainor, Aligned Learning

Whether the customer is a member of your community or your colleague, they need to be seen and valued. We will discuss how to ensure respect and trust along with ways to serve others who serve others. *Customer Service (2.5 hours)*

4:45 p.m. **Adjourn
(Dinner on Your Own)**

Thursday, January 30

- 7:30 – 8:15 a.m.** **Registration and Continental Break**
- 8:15 – 10:15 a.m.** **Updating a Municipal Retention Schedule (or, Don't Reinvent the Wheel That's Already in Motion!)**

Janice Miller, CMC, Records Manager, City of Rock Hill

With time, space and resource limitations, records managers need to be able to work with staff at all levels in local governments so that Freedom of Information Act requests and other information can be processed quickly. This session will help records managers and clerks evaluate the current local government retention schedule, determine changes that may need to be incorporated, and build relationships within the organization to coach confidence in retaining — or disposing — of records. *Records Management (2 hours)*

10:15 – 10:30 a.m. **Break**

10:30 a.m. – noon **Understanding State Law: Essential Insights for Municipal Officials**

Sara Weathers, Associate General Counsel, Municipal Association of SC

Interpreting the state laws and court rulings that govern cities can be a complex and dynamic challenge. Get tips on how to find and understand the laws, court rulings and opinions that guide the work of your city. *Municipal Law (1.5 hours)*

Noon – 1:15 p.m. **Lunch**

1:15 – 2:15 p.m. **Planning and Zoning in South Carolina**

Eric Shytle, General Counsel, Municipal Association of SC

Planning and zoning issues impact every facet of local government, but it can be unclear how clerks and treasurers factor into them. Learn about planning laws and the role of clerks and treasurers in the planning and zoning process. *Municipal Law (1 hour)*

2:15 – 2:30 p.m. Break

2:30 – 5:00 p.m. Customer Service Culture

Jeanne D'Orleans, Trainor, Aligned Learning

What does it take to build a customer service culture? What are the behaviors that everyone needs to display to each customer on a daily basis? We will uncover these and tie them to your municipality's core purpose. *Customer Service (2.5 hours)*

**5:00 p.m. Adjourn
(Dinner on Your Own)**

Friday, January 31

8:00 – 8:30 a.m. Registration

8:30 a.m. - noon The Art of Influence

William Tomes, Executive in Residence, The Joseph P. Riley Jr. Center for Livable Communities at the College of Charleston

Municipal clerks and treasurers are frequently called upon to navigate situations that may involve conflicting parties. To ensure that all parties are heard, they must use their ability to influence and persuade others. Get tips on how to elevate your negotiation skills. *Negotiation and Collaboration Skills (3.5 hours)*

Noon – 12:15 p.m. Graduation

12:15 p.m. Adjourn

SC Municipal Clerks and Treasurers Institute

MCTI is designed to provide municipal clerks and treasurers with the skills critical to their professions. Sessions are scheduled twice a year in the spring and fall. To graduate from the program and receive a certificate, participants must complete the entire three-year curriculum. To earn the necessary educational points for the International Institute of Municipal Clerks' Certified Municipal Clerk designation, clerks must complete the three-year curriculum and a capstone project. Those interested in pursuing the Association of Public Treasurers' Certified Public Finance Administrator can apply select MCTI sessions toward the required educational points.

Scholarship

At each session, the Municipal Finance Officers, Clerks and Treasurers Association awards a scholarship to attend MCTI. The scholarship recipient receives free registration each session necessary to complete the institute's six sessions. The scholarship is underwritten by the Municipal Association and is available only to MFOCTA members. The scholarship application is available at www.masc.sc (keyword: MCTI). The deadline for submitting the **scholarship application is Friday, January 17**. Submit scholarship application by email to: Elizabeth Copeland | ecopeland@masc.sc

Contact Information

Elizabeth Copeland
Staff Associate for Affiliate Services
803.933.1257 | ecopeland@masc.sc

Susan Walters
Administrative Assistant
803.933.1276 | swalters@masc.sc

Registration Information

The \$225 registration fee covers continental breakfast each day, lunch on Wednesday and Thursday, drinks, educational materials and other session information. **The registration deadline is Friday, January 17.** Refunds will not be given after this date.

Save time and postage by logging on to www.masc.sc to register. Online registrations must be paid by Visa or MasterCard. If paying by check, mail completed registration form and check made payable to the Municipal Association of South Carolina to:

MASC
PO Box 12220
Columbia, SC 29211
Attn: MCTI

Conference attire is business casual. Meeting room may be cool, so please prepare accordingly.

For special dietary requests, contact Susan Walters at swalters@masc.sc or 803.933.1276 as soon as possible and we will accommodate if possible.

Accommodations

A special nightly room rate is available at a new location, the Cambria Columbia Downtown – The Vista. Breakfast is included in your room reservation. Make reservations using the online booking link or by calling 803.728.3355 and mentioning the group name Municipal Association of SC to get the group rate.

Cambria Hotel Columbia Downtown – The Vista
1000 Lady St.
Columbia, SC 29201

Room Rate: \$149 plus taxes and fees

Parking: \$18/day

Check-in: 3 p.m.

Checkout: 11 a.m.

**Hotel reservation deadline is Sunday,
December 29**



1411 Gervais Street
PO Box 12109
Columbia, SC 29211
www.masc.sc

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Name Badge Information

The following information will appear on your name badge for this meeting:

First name (example: Bill)

Full name (example: William J. Smith, Jr.) Mr. Ms. Dr.

Title New

Local government/business name

Contact Information

Birth month/day

Last four digits of SSN

This combination of numbers is used as the official's personal identification number to access online services, simplify event registration and ensure proper recording of participation in Association training programs.

Local government/business name

Preferred mailing address New Type: Municipal Business

City/State

Zip

Preferred phone New Type: Municipal Business Mobile

Email address New

Person Completing Form

Name

Phone

Meeting Registration

\$225

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