

**ACCREDITATION POLICIES**

**COUNTY CLERKS AND DEPUTIES**

**2025**



# **FOR COUNTY CLERKS AND DEPUTIES**

Approved and Adopted  
by  
County Clerk Advisory Board  
and  
Oklahoma State University – County Training Program

(Revised 2007, 2008, 2009, 2010, 2013, 2015, 2018, 2024, 2025)

## **2025 COUNTY CLERK ADVISORY BOARD**

**Kristen Dowell, Washita County Clerk**  
**Lori Hendricks, Wagoner County Clerk**  
**Lorie Legere, Garfield County Clerk**  
**Eugina Loudermilk, Coal County Clerk**  
**Julie Swaner, Beckham County Clerk**  
**Melissa Graham, Custer County Clerk**  
**Connie Smith, Noble County Clerk**  
**Annette Smith, Washington County Clerk**  
**Kay Spurgeon, Nowata County Clerk**  
**Michael Willis, Tulsa County Clerk**  
**Alicia Wagnon, Lincoln County Clerk**  
**Cheryl Wilson, State Auditor and Inspector's Office**  
**Nancy Grantham, State Auditor and Inspector's Office**

## **OSU-CTP REPRESENTATIVES**

**Jean Hinkle, Director & Local Government Specialist**  
**Suni Hertt, Local Government Specialist**  
**Majenta Harper, Local Government Specialist**

County Training Program, Oklahoma State University  
Oklahoma Cooperative Extension Service

## TABLE OF CONTENTS

OVERVIEW _____	4
STATUTORY REQUIREMENTS _____	5
DUTIES OF THE COMMISSION _____	5
Meeting, Chairman, Quorum, Mileage, and Per Diem _____	6
Advisory Boards _____	6
Counties and County Officers - Objectives _____	7
Counties and County Officers Continued _____	8
CERTAIN COUNTY OFFICIALS TO PARTICIPATE IN TRAINING PROGRAMS AND EDUCATIONAL SEMINARS _____	8
POLICIES FOR THE COUNTY CLERK ACCREDITATION PROGRAM _____	8
Training Participants _____	8
Employee Transfers _____	8
Examination/Exercise _____	9
Program Accreditation _____	9
Transcripts _____	9
Certificate Requirements _____	10
Basic Accreditation – Purchasing Employees _____	12
DISCRETIONARY COURSES _____	13
Basic Accreditation Program - County Clerks and First Deputy _____	14
Advanced I Accreditation Program - County Clerks and First Deputy _____	14
Advanced II Accreditation Program - County Clerk and First Deputy _____	14
Basic Accreditation Program - County Clerk Deputies _____	15
Advanced I Accreditation Program - County Clerk Deputies _____	15
Advanced II Accreditation Program - County Clerk Deputies _____	15
Basic Accreditation Program - County Clerk Purchasing Deputies _____	16
CONTINUING EDUCATION REQUIREMENT _____	17
COURSE DESCRIPTIONS _____	18
CONTINUING EDUCATION _____	24
REQUEST FOR CONTINUING EDUCATION CREDIT _____	25

## OVERVIEW

The Oklahoma County Clerk Accreditation Program was initiated in the early 1990's with a Basic Certification Program that consisted of seven courses. On July 13, 2000, the Executive Board of the County Clerks Association of Oklahoma approved an Advanced Certification Program to complement the Basic Program and to provide an opportunity for all members to continue their training and education in local government operations.

On July 8, 2004, the County Training Program Advisory Board for the County Clerks accepted, and the Executive Board of the County Clerks Association of Oklahoma approved, an expanded plan which contains a Basic, Advanced I and Advanced II certification program.

Effective January 1, 2015, the County Clerk Advisory Board approved an expanded County Clerk Certification Program to include an Accreditation Program. Accreditation is achieved by both attending the required training and successfully completing the post-course exercise. By contrast, Certification is achieved by attending the required training for a particular certification.

Those participants that completed the Certification Program prior to January 1, 2017, were eligible to receive an Accreditation Certificate by successfully completing the post-course exercise for all required classes before January 1, 2017.

Effective January 1, 2024, the County Clerk Advisory Board approved the transition to go from a Certification/Accreditation Program to solely an Accreditation Program.

## **STATUTORY REQUIREMENTS**

The Commission on County Government Personnel Education and Training was created by Statute on May 11, 1982, to oversee the County Training Program. Under Oklahoma Sunset Law, the "Commission:" is subject to Sunset Review every three to six years.

Commission on County Government Personnel Education and Training There is hereby re-created, to continue until July 1, 2026, in accordance with the provisions of the Oklahoma Sunset Law, Section 3901 et seq. of Title 74 of the Oklahoma Statutes, the Commission on County Government Personnel Education and Training, hereinafter called the "Commission". The Commission shall be composed of the following five (5) members: The President of Oklahoma State University or designee; State Auditor and Inspector or designee; Director of the Oklahoma Department of Transportation or designee; Chairman of the Oklahoma Tax Commission or designee; President of the Oklahoma County Officers Association or designee.

### ***19 O. S. Section 130.1***

## **DUTIES OF THE COMMISSION**

The duties of the Commission shall be:

To oversee a professional development program for training Oklahoma county commissioners, county clerks, county treasurers, county assessors, court clerks, their deputies and employees, county sheriffs, excise board members, candidates for county office and any other persons through the Cooperative Extension Service at Oklahoma State University;

To provide guidance to the Cooperative Extension Service in designing curricula to be used in educational programs and materials;

To identify needs and set priorities for research to be conducted in cooperation with the Cooperative Extension Service in areas relevant to the study and improvement of Oklahoma county government and its functions and to accept gifts and grants for such purposes;

To cooperate with the advisory boards authorized in Section 130.4 of this title in determining the educational needs of county officials and their employees so that they can

perform their duties and responsibilities efficiently and professionally;

To contract with the Cooperative Extension Service at Oklahoma State University to administer personnel education and training for counties and other political subdivisions.

#### ***19 O. S. Section 130.2***

### **MEETINGS, CHAIRMAN, QUORUM, MILEAGE, AND PER DIEM**

The Commission shall meet within sixty (60) days after the effective date of this act. The President of Oklahoma State University or his or her designee shall serve as chair of the Commission. After the first meeting, the Commission shall meet as it deems necessary or when called by the chair or by any three members. Three members shall constitute a quorum and no official action shall be taken by the Commission unless there is a quorum present. (Note: Historic practice has been to meet twice per year, once in August and once in February.

The representative of the County Officers Association shall be reimbursed for mileage and per diem in accordance with the State Travel Reimbursement Act when attending Commission meetings or other activities associated with his or her duties. Other Commission members shall not be reimbursed.

#### ***19 O. S. Section 130.3***

### **ADVISORY BOARDS**

The Cooperative Extension Service is hereby authorized to create advisory boards as they deem necessary. Members of such advisory boards shall be appointed by the Cooperative Extension Service and shall include, but shall not be limited to, county government officials and appropriate state agency representatives. Meetings of advisory boards shall be called by the County Training Program Director of the Cooperative Extension Service. Such advisory boards shall assist in developing educational programs and materials for training county government officers and their employees.

Advisory board members shall be reimbursed for expenses incurred in the performance of their duties under Sections

130.1 through 130.7 of this title in accordance with the State Travel Reimbursement Act.

The Cooperative Extension Service is authorized to contract with state agencies and private entities to provide training.

#### **19 O.S. Section 130.4**

### **ADVISORY BOARD MEMBERSHIP**

Advisory board members will be required to regularly attend Advisory Board meetings. To ensure effective governance, board members are expected to actively engage in training sessions, Clerk Association events, and scheduled meetings. Missing three (3) consecutive Advisory Board meetings will result in forfeiture of one's board position and will result in the appointment of a new member.

### **COUNTIES AND COUNTY OFFICERS - OBJECTIVES**

The County Clerk Accreditation Program is designed for Oklahoma County Clerks and their deputies.

The objectives of each education and training program, as developed by the Commission in consultation with the advisory boards and administered through the Cooperative Extension Service at Oklahoma State University, shall include, but shall not be limited to:

1. Encouraging the professional development of the groups of county officials and their employees governed by this act by providing educational programs and reference materials on job-related topics on a timely basis;
2. Improving the efficiency of county government operations by providing technical assistance in the administration of mandated duties;
3. Improving the technical skills of county employees by providing technical training in the operation and maintenance of construction equipment and machinery; and
4. Serving as a reference and resource center for county officials.

**19 O.S. Section 130.5**

**COUNTIES AND COUNTY OFFICERS CONTINUED**

Any professional or clerical support staff required by the Commission on County Government Personnel Education and Training shall be provided through the Cooperative Extension Service. The training programs developed pursuant to Section 130.1 et seq. of this title shall not interfere with or duplicate any other existing training programs for county government personnel. Any expenses incurred in the performance of the duties imposed upon the Commission by law shall primarily be paid out of funds appropriated or otherwise made available to the Office of the State Auditor and Inspector and may also be paid by the collection of training expenses paid by the counties directly to the Cooperative Extension Service.

**19 O.S. Section 130.6**

**CERTAIN COUNTY OFFICIALS TO PARTICIPATE IN TRAINING PROGRAMS AND EDUCATIONAL SEMINARS**

Each county commissioner, county clerk, county treasurer, and court clerk holding office on May 11, 1982, and those elected thereafter, and the deputies of such elected county officers shall be required to participate in the appropriate training programs, as defined in subsection B of this section, and educational seminars relevant to their positions and duties conducted pursuant to Sections 130.1 through 130.7 of this title. In addition, county sheriffs and county assessors may attend the training programs specified in this section.

Appropriate training programs shall include those programs provided by the Cooperative Extension Service at Oklahoma State University.

**19 O. S. Section 130.7**

**POLICIES FOR THE COUNTY CLERK ACCREDITATION PROGRAM**

**Training Participants**

All County Clerks in the State of Oklahoma, whether appointed or elected to office, and County Clerk's Deputies are regarded as participants in the training program under the direction of their County Clerk.

**Employee Transfers**

When a county employee transfers from another department, the courses completed, and credit hours accrued in the other county office accreditation program that are applicable to the County Clerk Accreditation Program will be counted towards the requirements for the County Clerk Accreditation Program if the post course exercises have been completed. If the post course exercises have not been completed the employee must take and submit the



post course exercise pertaining to that course for credit towards the County Clerk Accreditation Program.

### **Examination/Exercise**

County Clerks and their deputies are required to complete a post-course exercise after each course to obtain accreditation credit for the course work. For in-person courses, participants receive the post-course exercise at the class and are required to submit the exercise to the County Training Program instructor within two weeks or make other arrangements. The exercise can be emailed, faxed, or mailed and the original is kept by the County Training program. Many post-course exercises have an online option as well.

For the CTP training webinars via Zoom, the participant will receive the post-course exercise via email after the course. The participant has the option to print out the exercise and complete it manually or use a link for an online version of the exercise.

Participants are required to score 80% or more to obtain a passing grade. In the event the participant does not score at least 80% correct, there is one opportunity to correct the incorrect answers in the exercise. If corrections do not raise the score to at least 80%, the participant must repeat the class and exercise before credit is received.

### **Program Accreditation**

Accreditation credit hours from OSU-CTP requires timely completion of a post-course exercise with a minimum 80% score. Discretionary hours, outside of OSU-CTP, may not require an exercise.

The Accreditation certificate is confirmation the individual has attended the required course hours and has successfully completed the post-course exercise. Upon successful completion of the course hours and successfully passing the post course exercise for Basic, Advanced I, and Advanced II Accreditation Programs, respectfully, the candidate for accreditation will receive an accreditation certificate to be awarded at the annual spring educational training school.

The Accreditation for the Basic Accreditation Program will be awarded before the Advanced I Accreditation Program certificate. The certificate for Advanced I Accreditation Program will be awarded before the Advanced II Accreditation Program certificate. If an individual completes accreditation requirements after the spring educational training school and requests that their program certificate be awarded before the next annual school, the certificate will be awarded only after approval by the County Clerk Executive Board and OSU-CTP.

### **Transcripts**

Transcripts will be provided annually for all County Clerk offices at the spring educational training school. County Clerks will notify OSU-CTP of any changes or additions in County Clerk personnel in order to maintain current information.

A transcript is a record of courses and certificates. OSU-CTP keeps the record of each participant's courses and certificates completed. Transcripts will be provided for all County Clerk participants upon request. Participants may notify OSU-CTP of any changes or additions in order to maintain current information. OSU-CTP prefers that each respective County Clerk communicate the information needed for such updates; information for themselves and for their employees.

As of 2023, ACEWeb, the online platform that OSU-CTP participants navigate to enroll in classes. ACEWeb allows participants to see courses completed and exercise scores. Online courses are not seen in ACEWeb, and participants need to contact OSU-CTP for completion date and score.

Circumstances not covered by the above policies may be presented to the County Clerk Advisory Board for consideration.

## **Accreditation Program for County Clerks and Deputies**

*Effective July 1, 2018*

**County Training Program – Oklahoma State University – Oklahoma Cooperative Extension Service**

Phone 405-744-6160      FAX 405-744-8210      [ctp@okstate.edu](mailto:ctp@okstate.edu)

<b>CERTIFICATE REQUIREMENTS</b>	<b>County Clerk &amp; 1st Deputy</b>				<b><u>County Clerk Deputies</u></b>		
	<b>Basic</b>	<b>Adv. 1</b>	<b>Adv. 2</b>		<b>Basic</b>	<b>Adv. 1</b>	<b>Adv. 2</b>
Basic Accounting 1 - Intro	6						
Basic Accounting 2	6						
Budget Process 1 - Intro	6						
County Clerk Duties Review 1	6				6		
Managing in an at-will Organization	12						
Open Meetings	3						
Open Records	3					3	
Purchasing Procedures 1	6						
Purchasing Procedures 2	6						
Statute Reference	6						6
Budget Process 2		6					
Excise Board-Part 1		3					
Excise Board-Part 2		3					
Land Records		12					
Overview of County Government		6					
Navigating Payroll and Employment Law		6					
Supervisory Skills 1		6					
Councils, Commissions, Boards, and Trusts			6				
Customer Service			6			6	
Effective Work Skills			6		6		

Intro to Purchasing					3	
Inventory Tracking & Disposal			6			
Supervisory Skills 2			6			
Understanding the Whole of County Gov't					3	
<b>Required Courses total hours</b>	<b>60</b>	<b>42</b>	<b>30</b>		<b>15</b>	<b>12</b>
<b>Discretionary Courses total hours</b>	<b>3</b>	<b>6</b>	<b>9</b>		<b>24</b>	<b>18</b>
<b>Total Hours</b>	<b>63</b>	<b>48</b>	<b>39</b>		<b>39</b>	<b>30</b>

Discretionary Hours may be obtained by taking any OSU-CTP accreditation class (except required classes listed above) or by taking any other approved training.

Accreditation credit hours from OSU-CTP require timely completion of a post-course exercise with a minimum 80% score. Discretionary hours, outside of OSU-CTP, may not require an exercise.

Courses taken before 7/1/2018 will be translated into appropriate credit hours in the program above.

Beyond Advanced 2 Accreditation, maintaining accreditation in good standing requires six credit hours per year from any approved training and a post-course exercise is not required.

### **Basic Accreditation – Purchasing Employees**

Any County Clerk employee who is designated as a **Purchasing Agent, Assistant Purchasing Agent, Requisitioning Officer or Receiving Officer** must have the additional hours listed in the table below for Basic Accreditation.

These additional hours will reduce the number of discretionary hours available.

	<b>Purchasing Agent</b>	<b>Assistant P.A.</b>	<b>Requisitioning Officer</b>	<b>Receiving Officer</b>
Intro to Purchasing				3
Purchasing Procedures 1	6	6	6	
Purchasing Procedures 2	6	6		
Inventory Tracking & Disposal				6
Potential Additional Hours Required				
Discretionary Courses	12	12	6	6
Discretionary Courses total hours	12	12	6	9

## DISCRETIONARY COURSES\*

<b>Discretionary Courses</b>	<b>Hours</b>
A Practical Guide to Parliamentary Procedure	4
Basic Computer Skills	3
Basic Mapping	12
Cash Flow Management	4
Communication Skills	3
County Purchase Card (P-Card) Online	6
County Clerk Duties Review 2	6
Economic Development	3
Equalization Board	6
Fundamentals of Administration	6
Grant Writing	6
Legislative Process	6
Public Communications	3
Supervisory Skills 3	6
Tax Roll Corrections	6

\* New courses developed in the future may be added to this list.

## **Basic Accreditation Program – County Clerks and First Deputy**

- ❖ County Clerks and first deputies complete and receive the same accreditation.
- ❖ County Clerks and first deputies must complete 60 hours of required courses and 3 hours of discretionary courses for a total of 63 hours to earn a Basic Accreditation.
- ❖ The certificate for the Basic Accreditation Program is awarded and must be earned before the Advanced I Accreditation Program certificate.
- ❖ Certificates are awarded annually at the spring educational training school/conference.
- ❖ Nothing precludes multiple certificates awarded in the same year.

## **Advanced I Accreditation Program - County Clerks and First Deputy**

- ❖ County Clerks and first deputies must complete 42 hours of required courses and 6 hours of discretionary courses to earn an Advanced I certificate.
- ❖ The Advanced I program certificate will be awarded before the Advanced II program certificate.
- ❖ Discretionary courses taken in Basic Accreditation Program cannot be duplicated to receive Accreditation in Advanced I.
- ❖ Certificates are awarded annually at the spring educational training school/conference.
- ❖ Nothing precludes multiple certificates awarded in the same year.

## **Advanced II Accreditation Program - County Clerk and First Deputy**

- ❖ County Clerks and first deputies must complete 27 hours of required courses and 9 hours of discretionary courses for a total of 36 hours to earn an Advanced II certificate.
- ❖ Discretionary courses taken in Advanced I cannot be duplicated to receive accreditation in Advanced II.
- ❖ Certificates are awarded annually at the spring educational training school/conference.
- ❖ Nothing precludes multiple certificates awarded in the same year.

## **Basic Accreditation Program – County Clerk Deputies**

- ❖ County Clerk deputies must complete 15 hours of required courses and 24 hours of discretionary courses for a total of 39 hours to earn a Basic certificate.
- ❖ The certificate for the Basic Accreditation Program is awarded and must be earned before the Advanced I Accreditation Program certificate.
- ❖ Certificates are awarded annually at the spring educational training school/conference.

Nothing precludes multiple certificates awarded in the same year.

❖

## **Advanced I Accreditation Program - County Clerk Deputies**

- ❖ County Clerk deputies must complete 12 hours of required courses and 18 hours of discretionary courses for a total of 30 hours to earn an Advanced I certificate.
- ❖ The Advanced I program certificate will be awarded before the Advanced II program certificate.
- ❖ Discretionary courses taken in Basic Accreditation Program cannot be duplicated to receive accreditation in Advanced I.
- ❖ Certificates are awarded annually at the spring educational training school/conference.

Nothing precludes multiple certificates awarded in the same year.

## **Advanced II Accreditation Program - County Clerk Deputies**

- ❖ County Clerk deputies must complete 6 hours of required courses and 24 hours of discretionary courses for a total of 30 hours to earn an Advanced II certificate.
- ❖ Certificates are awarded annually at the spring educational training school/conference.
- ❖ Discretionary courses taken in Advanced I cannot be duplicated to receive accreditation in Advanced II.
- ❖ Certificates are awarded annually at the spring educational training school/conference.
- ❖ Nothing precludes multiple certificates awarded in the same year.

## **Basic Accreditation Program – County Clerk Purchasing Deputies**

- ❖ The Purchasing Agent and the Assistant Purchasing Agent must complete Purchasing 1 (6 hours) and Purchasing 2 (6 hours) as discretionary courses.
- ❖ The Requisitioning Officer must complete Purchasing 1 (6 hours) as a discretionary course.
- ❖ The Receiving Officer must complete Introduction to Purchasing (3 hours) Inventory Tracking and Disposal (3 hours) as discretionary courses.
- ❖ These additional hours will reduce the number of discretionary hours available.



## **CONTINUING EDUCATION REQUIREMENT**

Six (6) hours of continuing education credits are required each year after completion of Advanced II Accreditation in order to maintain accreditation in good standing. These may be satisfied by CTP courses and selected outside conferences, workshops, and seminars.

In highly unusual, extenuating circumstances, a county official or employee may request a waiver of the annual six (6) hours Continuing Education Units (CEU) requirement for maintenance of accreditation in good standing. People applying for this waiver must provide a written, signed letter that explains the need for the waiver. In order for a waiver to be granted, the officer association executive board, the State Auditor and Inspector, and the OSU county training program leader must all agree, sign and date the waiver.

## **COURSE DESCRIPTIONS**

### **Basic Accounting 1 - Intro (6 Hours)**

This course defines bookkeeping and accounting before exploring financial statements and illustrations for county government. You will learn how to use accounting information to assist with planning and budgeting. This course gives a basic understanding of the accounting responsibility of all elected officials and how monies flow from deposit to expenditure. You will dive into the chart of account structure for county government and identify key standard operating procedures. This course also describes the process of the required audit performed by the State Auditor and Inspector, including a review of internal controls.

### **Basic Accounting 2 - Intro (6 hours)**

Basic Accounting I must be completed before taking Basic Accounting II. This course gives a basic understanding of the accounting relationship between the county clerk's appropriations ledger (available budget) and the money deposited with the county treasurer. You will identify the steps outlined in the Oklahoma Statutes for the checks and balances of county funds. This course explains the difference between unencumbered funds and encumbered funds, the difference between the county clerk's balances and the county treasurer's balances, and the difference between appropriation and apportionment.

### **Basic Computer Skills - Online (3 hours)**

This course provides a basic introduction to Microsoft Excel. Prior to enrolling in this course, you will need Microsoft Excel software on your computer, and you will need to operate a Windows Operating System to open Microsoft Excel, access files, and access the internet. This course covers the basics of Excel, working with cells and sheets, formulas and functions, and working with data.

### **Basic Mapping (12 hours)**

This course provides an overview of mapping. You will explore practical uses for maps in county government and learn the importance of mapping skills for elected officials and deputies. This course explains how land is platted and surveyed and how this information is applied to mapping tracts of land. You will learn to compute acreage, determine lengths and various other measurements, and perform other practical mapping skills. This course also explores the history of Oklahoma's mapping and platting system, and case studies give you hands-on experience in surveying, describing property, and platting land.

### **Budget Process I – Intro (6 Hours)**

This course provides a general introduction to county funds and an in-depth look at the county general fund and its budget requirements. You will learn about general fund sources of revenue, line items of expenditure, the statutory timetable, and the roles of county officers. This course also explores the computation of available funds and an introduction to budget-related State Auditor and Inspector forms.

### **Budget Process II (6 Hours)**

This course provides a detailed, practical application of the county general fund budget process. You will use an actual county's data for a hands-on case study in which budget estimates are generated, funds available are estimated, budget reductions are made, the

mill levy is computed, and the budget completed. You will use calculators and State Auditor and Inspector forms to complete portions of an actual budget. This course explores interactions with cash funds, transfers, and supplements.

### **Cash Flow Management (4 Hours)**

This course examines the detailed planning and timing of county expenditures and expected deposits. You will specifically explore the additional efficiencies and interest earnings that may be acquired as a result of careful planning by everyone in county government. This course is composed of data and case studies from actual county experiences.

### **Communication Skills (3 Hours)**

This course explores everyone's need for communication. You will learn what communication is, how we communicate, and how to communicate effectively with the people around you. You will also use personality tests to determine how to communicate with difficult people and how you can strengthen communication in tough situations.

### **County Clerk Duties Review I (6 Hours)**

This course reviews the duties and responsibilities of the county clerk using the *Handbook for County Clerks of Oklahoma* as the text. You will learn about the Governmental Tort Act; the office of the county clerk; the general county clerk duties; boards, meetings, publications and notices; and budgets. This course includes short lectures provided by county clerks and deputies, as well as small group discussions of prepared questions and questions that you may have on the day of the course. This course encourages "round table" discussion of the day-to-day operations of the clerk's office and how to meet the requirements of the law while still providing service to the citizens.

### **County Clerk Duties Review II (6 Hours)**

This course reviews the duties and responsibilities of the county clerk using the *Handbook for County Clerks of Oklahoma* as the text. You will learn about the county accounting system, payroll, recording and filing, filing liens and judgements, and disbursements. This course includes short lectures provided by county clerks and deputies, as well as small group discussions of prepared questions and questions that you may have on the day of the course. This course encourages "round table" discussion of the day-to-day operations of the clerk's office and how to meet the requirements of the law while still providing service to the citizens.

### **Customer Service (6 Hours)**

This course is valuable to all individuals as we all have customers to whom we provide services. You will explore the circle of service, the people that we serve, what we are trying to accomplish, hospitality habits, and the value of knowing your community so you can assist others through that knowledge. The afternoon sessions explore dealing with difficult customers and telephone etiquette.

### **Duties of Councils, Commissions, Boards, and Trusts (6 Hours)**

This course explores the local government bodies that operate as councils, commissions, boards, and trusts. You will learn the legal authority for each one and examine examples of how Oklahoma uses each of these bodies. You will team up in small groups and each group will answer a series of questions resulting in a basic description of a new, unique county trust authority.

### **Economic Development: The Role of County Officials (3 Hours)**

This course offers county officials some insights into the primary issues affecting the development of our local economies. You will examine tools available to communities and counties to assist with local economic development efforts. This course specifically covers impact analysis, sales gap analysis, and surveys. You will learn about the availability of online data sources and how to access them. You will share your perception of the role of county government in economic development. This course utilizes group activities, facilitated discussions, and panel discussions to encourage participation and feedback.

### **Effective Work Skills (6 Hours)**

This course explores skills that make us more effective – producing the results we are striving for in the best and most efficient manner. You will concentrate on three areas: 1) Effective Communication – including improving listening skills, questioning skills and understanding nonverbal behavior better; 2) Effective Time Management – exploring methods to better plan and manage our time more efficiently, and 3) Effective Relationships – focusing on learning to be more successful in relationships with difficult individuals.

### **Excise Board Training Webinar (6 Hours)**

This course focuses on the statutory duties of excise board members and their interactions with other elected officials. You will learn about the county general fund budget process, including identifying the available dollars and allocation of those dollars as provided in the constitution and statutes. This course is presented in two, three-hour segments. This course is also offered as a six-hour online course that you can take asynchronously at your own pace.

### **Fundamentals of Administration (6 Hours)**

This course will equip you with practical tools for decision-making, helping them evaluate processes, procedures, and services. You will learn how to answer difficult questions in administration, such as: Should we continue these processes? If so, how can we improve them? If not, how can we eliminate them with minimal impact? You will utilize critical thinking, problem solving, root cause analysis, operational efficiency, implementing change, and conflict resolution.

### **Grant Writing (6 Hours)**

This course explores the basics of grant writing. Participants will learn how to find grants, how to build winning grants for their counties, and how to improve grants. This course will use tips and tricks, but will also prioritize the experiences of the audience to deepen everyone's understanding of how grants work in counties.

### **Introduction to County Purchasing Procedures (3 Hours)**

This course is an introduction to the Oklahoma County Purchasing Act. You will review the roles and responsibilities of all elected county officials and purchasing officers. This course examines the procedures as required in Title 19 (the County Purchasing Act) and in Title 61 (competitive bidding). You will also explore inventory disposal.

### **Inventory Tracking and Disposal (6 Hours)**

This course emphasizes the need for counties to create a system for tracking and identifying fixed and consumable inventories to maintain compliance with state statutes. You will examine those statutory requirements, and the forms required to maintain the system. This course also defines the roles and responsibilities of the county officers, department heads, and receiving/inventory officers in the inventory process.

### **Investments and Collateral (6 Hours)**

This course addresses financial securities and instruments, many of which can be used for investing and collateral. You will explore every security and instrument described in the statutes and examine them in terms of liquidity, safety, and yield. This course also investigates the “T-bill,” “Mae,” “Mac,” and other financial “families.” You will review the Oklahoma Statutes and the Oklahoma State Treasurer Administrative Rules.

### **Land Records (12 Hours)**

This two-day course examines the statutes relating to the registration of property. You will study legal descriptions and different types of conveyances, perform a tract platting exercise, and learn how to use the tract index by doing your own indexing of platted and unplatted land entries.

### **Legislative Process (3 Hours)**

This course reviews the governmental structure of Oklahoma, with emphasis on the legislative branch. You will learn how an idea becomes a law. You will complete an exercise using the legislative website to track legislation as it moves through the process of consideration to become law.

### **Managing Personnel in an At-Will Organization (12 Hours)**

This course examines Oklahoma’s “right to work” or “at-will employment” environment, which is often incorrectly perceived as permission and protection for blanket termination. You will learn the common exceptions to at-will legislation on the state and national levels. This course will explore hiring, managing performance and termination, examining an employer’s role from the beginning of hiring the right employee to the point of exit, and the basic management responsibilities during the employment period. You will explore interview techniques, performance measures for productivity issues, and employer best practices.

### **Open Meetings (3 hours)**

This course examines what public bodies must do to conduct meetings under the Oklahoma Open Meeting Act (found in Title 25 of the Oklahoma Statutes). This course focuses on the statute’s purpose to encourage and facilitate the public’s opportunity to observe their government and understand how its decisions are made. This course explores the statute, court decisions, and attorney general opinions that address implementation of the law in county government.

### **Open Records (3 Hours)**

This course explores Oklahoma laws and procedures dealing with public records. You will learn the definition of open records, the required availability of open records, and county officers’ responsibilities in handling requests for open records from the public.

### **Overview of County Government (6 Hours)**

This course reviews the primary functions of county government and the duties and responsibilities of elected and nonelected officials in carrying out those functions. You will learn the roles of all county departments and how those departments interact with each other as a team in providing services to the public.

### **Navigating Payroll and Employment Law (6 Hours)**

This course is for all elected officials, first deputies, and department heads. You will explore the shared responsibilities of maintaining proper personnel records within each department and examine how federal and state employment laws govern these practices. This course

reviews the step-by-step process of building the personnel files and payroll records for new hires, such as verification of social security (E-Verify) and employment eligibility verification (I-9). You will review various practices of successfully operated payroll departments. You will also learn the value of organizing personnel files and documenting benefits that are offered to county employees. This course reviews insurance forms, garnishments, retirement, child support, federal tax forms, and more.

### **Public Communication (3 Hours)**

This course teaches you how to tackle public communication. You will explore how to confidently and effectively communicate with an audience. This course examines preparation, organization, research, and audience analysis in public communication. This course ends with a lively group debate to reinforce the key topics.

### **Purchase Card (P-card) Training (3 Hours)**

This course prepares the purchase cardholder to use the purchase card in a responsible and accountable manner through examining the laws, rules, policies, and procedures within the purchase card program. You will identify the roles and responsibilities of state agencies, the contract holder, and county employees. You will also examine the process required to participate in the purchase card program. This course will explore the steps in a typical purchase card transaction, including the forms that are used. You will learn the methods of purchase, purchase card limits, and other key elements related to cardholder purchases through examples. This course is a requirement for the purchase cardholder before a purchase card is issued.

### **Purchase Card (P-card) Training (statutory requirement 2 year refresher) (2 Hours)**

This course meets the statutory requirement for the purchasing agent and purchase cardholders to attend training every two years from the date of the last training session. This course is not the initial training required for purchase cardholders before the purchase card is issued. This is a refresher course that revises or updates the cardholder's knowledge of the use of the P-card through examining the laws, rules, and policies and procedures within the program.

### **Purchasing I (6 Hours)**

This course details the responsibilities of the purchasing agent as set forth in the Oklahoma Statutes. You will explore the different responsibilities of county elected officials, requisitioning officers, receiving and inventory officers, and state agencies as defined in the County Purchasing Act. This course provides a detailed presentation of the procurement methods under Title 19 and Title 61 for county government. This course occasionally utilizes guest speakers from state or federal agencies to discuss different topics as they relate to county purchasing policies.

### **Purchasing II (6 Hours)**

Purchasing I must be completed before taking Purchasing II. This course focuses on different purchasing situations and how the Oklahoma Statutes provide direction. You will learn how to prepare a bid and the writing specifications for the bid. This course also provides the requirements for analyzing a bid and making recommendations, as well as the disposal of property. You will complete several course exercises to help reinforce the presentation.

### **Statute Reference (6 Hours)**

This course includes a quick study of the court case reference system. You will explore how the Oklahoma Statutes are organized and how to find specific information on the website.

You will learn how to find and read court cases and judges' decisions. This course provides laptops to go online to review the Oklahoma State Courts Network (OSCN) statutory legal research. You will also complete exercises for hands-on experience.

### **Supervisory Skills I (6 Hours)**

This course focuses on transitioning from the mindset of being an individual contributor to a supervisor. You will learn how to develop your supervisor mindset (changing your paradigm to learn how to develop this mindset), hold consistent 1-on-1 feedback sessions to help people get and stay engaged, help your team understand why things are done the way they are, learn about establishing a culture of giving and receiving feedback, lead your team through change, and manage your own time and energy so you can be an effective leader.

### **Supervisory Skills II (6 Hours)**

This course builds on Supervisory Skills I and explores working with employees predominantly as groups. You will learn to define culture, describe the benefits and importance of it to your teams, and learn ways to influence the culture as a leader. You will then explore leadership models, including people leadership, and learn techniques to engage and motivate employees. This course will conclude with an exploration of integrity and ethics and why they are so important, especially in public service.

### **Supervisory Skills III (6 Hours)**

This course will build on the individual and group supervisory skills learned in Supervisory Skills I and Supervisory Skills II. You will explore more advanced leadership techniques and concepts.

### **Tax Roll Corrections (6 Hours)**

This course includes two major sections of study. You will review the assessment process and identify methods of correcting original assessments and the assessment roll, while also learning the duties of various county boards and officers. You will then examine several methods of correcting the county tax rolls, including the process for handling erroneous assessments, clerical errors, omitted properties, verification of clerical errors, and court orders.

### **Understanding the Whole of County Government (3 Hours) (webinar only)**

This course reviews the primary functions of county government and the duties and responsibilities of elected and nonelected officials in carrying out those functions. You will learn the roles of all the county departments and how those departments interact with each other as a team in providing services to the public.

## CONTINUING EDUCATION

### COUNTY CLERKS ASSOCIATION

Adopted January 1, 2010

Reviewed July 16, 2024

Continuing Education Units (CEU) are intended to encourage professionals to expand their knowledge base and stay up to date on new developments. Six hours of CEUs are required each year after completion of Advanced II Accreditation in order to maintain accreditation in good standing. These may be satisfied by County Training Program courses and selected outside conferences, workshops, and seminars.

A three-person committee will make decisions regarding approval of CEUs for those programs sponsored by agencies not listed herein. The committee will consist of the following members:

1. SA&I representative
2. OSU-CTP representative
3. President of the County Clerk's Association

Educational programs must be a minimum of 3 hours in length and provide educational instruction on a particular topic. One CEU will be issued for each hour in attendance. CEUs will be reported on the official transcript of the County Training Program.

Request for CEU approval must be submitted by June 30 and December 30 for the classes attended in the previous six months. Applications should be submitted to the OSU County Training Program.

Attendees must submit a Request for Continuing Education form and a copy of the program outline or agenda. The class instructor must sign the form. Exception: If the County Clerk's Advisory Board has made arrangements for a sign-in sheet to be collected at a particular education session, the individual CEU Request form does not need to be submitted. The sign-in sheet will be submitted along with a copy of the agenda to CTP.

The following events are considered approved for continuing education units without approval of the three-person Committee. However, the application will need to be completed and submitted unless a sign-in sheet is available (see exception above).

1. State Auditor and Inspector Workshops
2. Internal Revenue Service workshops
3. Oklahoma Public Employees Retirement workshops
4. Activities of nationally recognized associations (such as NACO, IACREOT, PRIA, NACRC). Limited to 3 hours per year.

County Training Courses taken after accreditation will count for CEU credit so long as CEU credit is requested when registering for the course.



## REQUEST FOR CONTINUING EDUCATION CREDIT

### County Clerk Accreditation Program

This form was developed for your convenience in reporting CEUs for the County Clerk Accreditation Program at OSU. Please type or print legibly and complete this form in its entirety. Be sure and keep a copy for your files.

Name

Phone

Position

County

Mailing Address

City/State/Zip

Program Title:

Program Date: \_\_\_\_\_

Number of Instructional Hours

Sponsoring Organization:

Program Location \_\_\_\_\_

Instructor:

Provide course outline or overview (may attach additional materials)

Signature of Instructor/Program Official

(Signature not required if sign-in sheet was provided by Instructor)

Signature of Applicant

Date

### Approval

CTP Representative	Yes	No	Date
--------------------	-----	----	------

SA&I Representative	Yes	No	Date
---------------------	-----	----	------

President of County Clerk's Association	Yes	No	Date
---	-----	----	------

Mail, Email, or Fax form to:

OSU County Training Program  
318 Legacy Hall  
Stillwater OK 74078-6026  
Phone: 405-744-6160  
Fax: 405-744-8210  
**EMAIL: [CTP@OKSTATE.EDU](mailto:CTP@OKSTATE.EDU)**