



COUNTY TRAINING PROGRAM

OSU Extension

Excise Board Training Policies and Procedures

OSU County Training Program

Oklahoma Cooperative Extension Service

ctp@okstate.edu or 405-744-6160

[OSU-CTP Website](#)

In Cooperation with the State Auditor and Inspector

And Oklahoma Statutes, [Title 68, Section 3006](#)

- A. Excise board training and equalization board training are separate requirements. Excise board training requirements are listed in the statute reference shown above. For the specifics of equalization board training, see Oklahoma Statutes, [Title 68, Section 2862](#), and/or contact the OSU Center for Local Government Technology at 405-744-6049.
- B. Within 12 months of appointment, an excise board member must complete the prescribed 6 hours of training. There are two options:
 1. Excise Board Training, Parts I and II. Parts I and II are both three hours in length and are offered live through Zoom.
 2. Excise Board Training (Online) is a virtual, six-hour course that can be completed at the member's own pace. There are eight modules, and the course must be completed within 60 days of the start date.
- C. Each calendar year, following the 12-month period in which the board member completed the initial six hours of training, the board member must complete 3 hours (or more) of additional training. Options for this training are described in more detail below.
- D. Per statute, failure to complete the training within the statutory timeframe will initially result in the loss of compensation and ultimately result in forfeiture of office.
- E. Around July of each year, members lacking their required calendar year training will be notified and informed of opportunities to receive the required training. This notice is normally communicated by email. Notice will also be communicated to the appropriate county clerks.
- F. Around December 1 of each calendar year, noncompliant members will receive notification of their noncompliant status. Notice will also be sent to the board of county commissioners, the county clerk, and the State Auditor and Inspector. Unless noncompliant members complete the required training in December, their compensation will cease starting January 1.
- G. Within 30 days of the noncompliance notice, the State Auditor and Inspector shall contact noncompliant members and provide an opportunity to come into compliance. OSU-CTP will provide this opportunity to come into compliance by making available the six-hour training and at least one three-hour course during the month of January.
- H. After the designated opportunity to come into compliance passes, OSU-CTP will inform the State Auditor and Inspector, the board of county commissioners, and the county clerk. At this point, the State Auditor and Inspector shall send a letter communicating the forfeiture of office of any noncompliant member.

- I. The following courses are available to excise board members to receive the required minimum of three hours per year (beginning the calendar year following the 12-month period in which the member was required to complete the initial six-hour training). Training information and registration is available on our website under “[Online Registration](#).”
1. Understanding the Whole of County Government, 3 hours – online
 2. Introduction to County Purchasing Procedures, 3 hours - online
 3. Open Meetings, 3 hours – may be by zoom or in-person
 4. Open Records, 3 hours – may be by zoom or in-person
 5. Budget Process I - Intro, 6 hours – in-person
 6. Budget Process II, 6 hours – in-person
 7. Cash Flow Management, 4 hours – may be by zoom or in-person.
 8. Overview of County Government, 6 hours – in-person
 9. Tax Roll Corrections, 6 hours – in-person
 10. A Practical Guide to Parliamentary Procedures, 4 hours – online
 11. Communication Skills, 3 hours – in-person
 12. County Clerk Duties Review I, 6 hours – in-person
 13. County Clerk Duties Review II, 6 hours – in-person (must take County Clerk Duties Review I before County Clerk Duties Review II)
 14. Duties of Commissions, Councils, Boards, and Trusts, 6 hours – in-person

For more information on these courses, visit our [Resources](#) page and reference “Approved Courses for Excise Board Training.”

- J. If a 6-hour course is taken to obtain the required 3 hours of credit, the member will receive credit for 3 hours in the current year and 3 hours in the following year.
- K. A member may not take multiple trainings/courses per year to obtain credits for future years in office. A member may take one three-hour course or one six-hour course in a given calendar year.
- L. During a member’s term of office, the member may repeat Excise Board Training Part I and/or Part II one time.
- M. If a member is repeating Excise Board Training Part I and/or Part II, each part will count toward the three hour per year requirement.
- N. During a member’s term of office, a member may not repeat training courses (other than Parts I and II). Note that a “term of office” for excise/equalization board members is concurrent to the term of office of county commissioner districts 1 and 3. January 2023 through December 2026 is a term of office.
- O. During a subsequent term of office, a member may repeat, one time, a training course taken in a prior term of office. The initial six-hour course is not required in subsequent terms of office but is an available option each term of office.