

Colorado County Treasurers' Association

In Conjunction With

Colorado Public Trustees' Association

Accreditation

And

Continuing Education

Program

In association with the
Office of Extended Studies
Mesa State College

October, 2005

ACCREDITATION AND CONTINUING EDUCATION PROGRAM
COLORADO COUNTY TREASURERS' ASSOCIATION
In Conjunction With
COLORADO PUBLIC TRUSTEES' ASSOCIATION

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HISTORY

In the Fall of 1991, the Continuing Education Committee began discussing the need to provide professional training and recognition for the membership of the Colorado County Treasurers' Association. The Committee recognized the need to enhance the professional image of County Treasurers and to demonstrate the importance of their role in county government.

As the trend in government is advancement in education, the Committee decided to develop a voluntary Accreditation Program for County Treasurers. The Accreditation Program acknowledges the importance of experience coupled with basic educational knowledge as requirements necessary to meet the challenges of ongoing changes inherent in a County Treasurer's career. The Continuing Education program addresses the need for education throughout that career.

The committee consulted the Division of Continuing Education at Colorado State University. A representative from CSU participated in the discussions and assisted in formulating the program. A rough draft of that Program was presented to the Executive Board of the Colorado County Treasurers' Association and the Board encouraged the Committee to present it to the Association's membership at Convention in June, 1992. After discussion at convention, the membership voted to make the final decision at Seminar in October, 1992.

To insure that the records of accreditation be verified and maintained a Accreditation Committee was established.

As of June, 2005, Mesa State College agreed to take over the accreditation program. Because of this, the following revisions were implemented and the accreditation committee now consist of:

Vice-Presidents, CCTA / CPTA as Co- Chairpeople of the Committee

Member of the Continuing Ed Committee appointed by the President of the CCTA

Representative from Mesa State College division of Continuing Education in an advisory capacity.

In order to make revisions to the Accreditation program, the Continuing Education Committee will present changes to the Colorado County Treasurers' and Colorado Public Trustee 's Association's (CCTA & CPTA) for vote by ballot. The Continuing Education Committee, in conduction with the Executive Board and Convention and Seminar Committees, will also provide the classes and materials for the Required Courses in the Education module. If accepted, the Accreditation Program will only be able to be canceled or discontinued through a majority vote of the entire membership of the Association.

GOALS

The program is designed to enhance the professionalism and productivity of the perspective Association members so that they may better serve their offices and the public. This system recognizes practical experience and training already received and blends it with the awareness of the continually changing needs of the profession.

The objectives are as follows:

1. To enhance the quality of services provided to the public
2. To increase the value of Association members to the county management group
3. To increase professional competency
4. To encourage personal growth
5. To provide professional recognition of members of the Association

In order to acknowledge these goals, the program has been defined into two areas:

1. Accreditation
2. Continuing Education (Renewal of Accreditation)

ACCREDITATION PROGRAM

PROGRAM REQUIREMENTS

To be eligible for accreditation the participant must:

1. Be a County Treasurer or Public Trustee who is an Association member.
2. Earn 120 points:
 - a. 60 points are required as outlined in the EXPERIENCE MODULE (see attached).
 - b. 60 points are required as outlined in the EDUCATIONAL MODULE (see attached).
3. Have application approved by Accreditation Committee (see attached).
4. Accreditation Certificate is subject to renewal every four years.

EXPERIENCE MODULE (60 points required)

Experience	Points	Maximum
1. Experience as a full-time County Treasurer or PT.	10 per year	50
2. Other supervisory positions in Colorado government prior to becoming a County Treasurer or Public Trustee	2 per year	10
3. Completion of Quadrennial Training (one time only).	12	12
4. Member of Executive Board or District Chairman of CCTA / CPTA, or chairman or member of active committee in Colorado County Treasurers' Association with minimum of two meetings per year.	2 each /yr	6
5. Officer in national or state job related organization or association.	2 each/yr	6
6. Service as a speaker, panel member or instructor at a CCTA / CPTA sponsored class or training seminar.	3 each	21

- | | | |
|---|--------|----|
| 7. Publication of information used as: | 3 each | 21 |
| a. Reference material in County Treasurer office. | | |
| b. Educational material for CCTA / CPTA. | | |
| c. Informational material for taxpayers. | | |
| 8. Community or Public Service presentation. | 2 each | 12 |

EDUCATION MODULE

To be eligible for acceptance in meeting the educational requirements, the 60 points must be completed during the five calendar year period immediately preceding the date of the certificate application. Points must be earned from both the Required Subjects and Electives sections. Points are granted using the formula of 1 point equaling one hour.

To obtain the educational requirements, the participant shall provide the following information to the Accreditation Committee for evaluation:

- Name of school, firm or organization conducting the program
- Location
- Title of program
- Description of course
- Dates attended
- Proof of attendance
- Points claimed

REQUIRED SUBJECTS (minimum of 40 points, maximum of 50 points)

These classes are available only at CCTA / CPTA-sponsored events, such as Conventions, Seminars, Division and District meetings, with a minimum of 12 points provided annually at CCTA / CPTA-sponsored events. These programs will be presented at least once every 4 years. Attendance at Convention, Seminar and District meetings will generate these points. Each meeting will have a point value established prior to the meeting. In order to receive credit the participant will be required to submit an official Accreditation Report which will be distributed to them at each CCTA / CPTA-sponsored event.

CONVERSION TABLE

Continuing Education units or class hours from an accredited college or university can be used. The following formula offers an equitable conversion of these units so that they may be utilized to receive points for required subjects. To make this conversion, multiply the total number of CEU's by 12 (example: 1 CEU = 12 points or 12 hours = 1 CEU).

Following is a List of Required Subjects:

Abatements/Tax Roll Corrections/Omitted Properties

Archived and Record Retention

Bankruptcy

Bonding of Elected Officials

Budgeting

Cash management

Certificates of Taxes Due

Distrain and Sale of Personal Property

Ethics

Escrow of Taxes

Fiduciary Duties and Responsibilities

Financing and Fiscal Management

Foreclosures

Investment Guidelines

IRS Issues

Law Suits

Legislation

Mineral Rights

Mobile Homes/Personal Property

Open Records Law

PDPA Statutory Requirements

Releases

Special Assessments/Special Districts

State-Assessed Properties

Tax Deferrals

Tax Distributions

Tax Sale Liens

Treasurer's Deeds

Understanding Statutes

ELECTIVES (minimum of 20 points, maximum of 30 points)

To qualify, elective courses must be received through any organized continuing education experience under responsible sponsorship, capable direction and qualified instruction. The overriding consideration in determining whether a specific program qualifies as an acceptable educational requirement is that it be a formal program of learning which contributes directly to the professional competence of the individual. It is the obligation of each participant to select a course of study which will contribute to his or her professional competence.

The program will qualify only if:

1. The program is conducted by a qualified instructor whose background, training, education or experience is appropriate for that particular program.
2. Official record of attendance is maintained.

To avoid disagreement over the acceptability of any course or subject, a request for verification may be made to the Continuing Education Committee. Final determination of acceptance of credit will be through a vote of the entire Continuing Education Committee.

Examples of Subjects Which May Qualify for Elective Credits:

Accounting and Auditing

Banking Relations

Bonds

Business Law

Conflict/Resolution

Communication Skills

Computer Science

Consumer Fraud

Customer Service Skills

Department of Property Taxation Procedures

Economics

Employment Laws

Fringe Benefits

Insurance/Worker's Comp

Legal Descriptions

Legislative Procedures

Management and Supervision

Mathematics

Media Relations

Paralegal Courses

Personnel and Labor Relations

Public Speaking

Public Administration

Real Estate Classes

Statistics

Stress Management

Tax Protestors/Frivolous Lawsuits

Title Industry Issues

Uniform Commercial Code

Applicable programs presented through BOCES, Padgett-Thompson, etc.

Any Appropriate College Courses

APPLICATION FOR ACCREDITATION

CCTA / CPTA

APPLICATION FOR ACCREDITATION

To apply for a Certificate of Accreditation, the applicant must do the following:

1. Execute the attached statement. Applicant is responsible for keeping his or her own records.
2. Send application and documentation plus two full copies of application and documentation to:

Accreditation Committee
c/o Chairperson
CCTA / CPTA
3. Include a check for \$25 payable to Colorado County Treasurers' Association. This fee is non-refundable. There will be an additional charge if all copies of the entire application are not included.
4. Mail the Application with a postmark date from January 1 to February 15. The Accreditation Committee will notify applicants of their decision by March 15.

If an application does not comply with requirements, an appeal may be made by resubmitting additional documentation to the Accreditation Committee by April 15. Specific instructions for the appeal will be included in the non compliance letter from the Accreditation Committee. The application will remain on file with the Accreditation Committee.

APPLICATION FORMAT

The application portfolio will consist of documents verify successful completion of both the Experience Module and Education Module attached to the completed application form. To be eligible for credit, experience and education points must be earned during the five calendar year period immediately preceding the date of application.



Application for Certification for Colorado Treasurers'/Public Trustees' Associatio

Office of Extended Studies
1100 North Avenue
Grand Junction, CO
970.248.2398

Please fill out carefully and completely in ink.

Student MSC ID Number OR Social Sec. #: _____ E-Mail Address: _____

Full Legal Name: _____
Last First Middle Former Name, if applicable

Birthdate: _____ Present Age: _____ [] Male [] Female

Business Address: _____
Number and street City County State Zip Code (Area code) Phone number

Address to which admission information should be sent (notify promptly if changed):
Number and street City County State Zip Code (Area code) Phone number

I, _____, do hereby apply for Certification under the Colorado County Treasurers'/Public Trustees' Certification Program.

I further state that I have completed the practical EXPERIENCE MODULE as listed below (attached are copies of Oath of Office or other documentation):

Table with 3 columns: Position/Experience, Year(s), Points Claimed. Includes multiple rows for listing experience.

Total number of experience points earned (60 points are required for Certification): _____

I hereby certify that to the best of my knowledge, the information in this application is true and complete. I understand that if found otherwise, it is sufficient cause for rejection. I hereby consent to the release of my transcript to the institution receiving this application.

Applicant's Signature

Date

**CONTINUING EDUCATION
(RENEWAL OF ACCREDITATION)
CCTA / CPTA**

PROGRAM REQUIREMENTS

Participants who apply to renew their certificates, shall include with their application form satisfactory evidence of having completed 36 points of Continuing Education. To be eligible for credit, points must be earned during the four calendar year period immediately preceding the date of application for renewal.

Continuing Education points may be earned through study programs, publications, or service as lecturer, discussion leader, or speaker, including Community and Public Service presentations.

STUDY PROGRAMS

To qualify the courses must be received through any organized, job-related continuing education experience under responsible sponsorship, capable direction and qualified instruction. The program must be conducted by a qualified instructor whose background, training, education or experience is appropriate for that particular program. A record of attendance must be maintained. If there is any doubt as to the acceptability of a course, send a course description to the Continuing Education Committee for approval. Final determination of credit will be through a vote of the entire Continuing Education Committee.

Credit will be given for actual hours attended. Only class hours or the equivalent will be counted. Student hours devoted to preparation are not acceptable. Travel time is not acceptable. Credit will be given for whole hours only, with a minimum of 50 minutes constituting one hour.

The following programs qualify provided they meet the requirements above:

I. University or college courses:

a. Credit courses – Multiply CEU's x 12 = Hours

b. Non-credit short courses - each classroom hour shall equal one qualifying point.

2. Formal organized CCTA / CPTA educational programs (seminars, conventions, district and division meetings).

3. Programs sponsored by other recognized organizations regularly providing education programs.

4. Formal correspondence or other individual study programs which require registration and provide evidence of satisfactory completion.

To obtain credit for study programs the following information must be provided to the Accreditation Committee:

1. School, firm or organization conducting the program
2. Location of program
3. Title of program or description of content
4. Dates attended
5. Points claimed
6. Proof of attendance (transcript or certificate of completion)

PUBLICATIONS

Credit may be allowed for published manuals, pamphlets or articles provided they contribute to the professional competence of the participant.

To obtain credit, the actual publication must be provided to the Accreditation Committee. Subject to Committee review, credit for preparation of publications may be given on a self declaration basis up to one-half of the renewal requirement.

SERVICE AS LECTURER, DISCUSSION LEADER, OR SPEAKER

Credit as an instructor, discussion leader, or speaker may be allowed for any meeting or engagement provided that the session is one which would meet the Continuing Education requirements of those attending, or is a Community or Public Service presentation. (Campaign speeches, etc. are not acceptable.) Credit for one point of Continuing Education shall be awarded for each hour completed as an instructor or discussion leader only to the extent that it contributes to the applicant's professional competence.

The credit allowed an instructor, discussion leader, or a speaker shall be on the basis of two hours for subject preparation for each hour of teaching. Credit for preparation shall be allowed only for the first time a course is taught during a renewal period. Subsequent teaching of the same course will earn half the points earned for teaching a course the first time. The maximum credit for preparation and teaching shall not exceed 18 points.

To receive credit the participant must provide the Accreditation Committee with a letter from the organization stating the date, time, location, material covered and length of presentation.

APPLICATION FOR RENEWAL OF ACCREDITATION
CCTA / CPTA

To apply for a Renewal of Accreditation, the applicant must do the following:

1. Execute the attached Statement. Applicant is responsible for keeping his or her own records.
2. Send application and documentation plus two full copies of application and documentation to:

Accreditation Committee
c/o Chairperson

CCTA / CPTA
3. Include a check for \$10 payable to CCTA / CPTA. This fee is non-refundable. There will be an additional charge if all copies of the entire application are not included.
4. Mail application with a postmark date from January 1 to February 15. The Accreditation Committee will notify applicants of their decision by March 15.

If an application does not comply with requirements, an appeal may be made by resubmitting additional documentation to the Accreditation Committee by April 15. Specific instructions for the appeal will be included in the non-compliance letter from the Accreditation Committee. The application will remain on file with the Credential Committee.

Certificates will be presented at the Summer Conference.

APPLICATION FORMAT

The application portfolio will consist of a completed Applicant Information form and executed Statement. Documents verifying successful completion of all Continuing Education credits are to be attached. The application will remain on file with the Accreditation Committee. Copies will not be returned.

To be eligible for credit, all Continuing Education points must be earned during the four calendar year period immediately preceding the date of application.



Application for Re-Certification for Colorado Treasurers'/Public Trustees' Associations

Office of Extended Studies
1100 North Avenue
Grand Junction, CO
970.248.2398

Please fill out carefully and completely in ink.

Student MSC ID Number OR Social Sec. #: _____ E-Mail Address: _____

Full Legal Name: _____
Last First Middle Former Name, if applicable

Birthdate: _____ Present Age: _____ [] Male [] Female

Business Address: _____
Number and street City County State Zip Code (Area code) Phone number

Address to which admission information should be sent (notify promptly if changed):
Number and street City County State Zip Code (Area code) Phone number

I, _____, do hereby apply for Re-Certification under the Colorado County Treasurers'/Public Trustees' Certification Program.

I further state that I have completed the following Continuing Education study programs (copies of appropriate college transcripts or Certificates of Completion with course descriptions are attached):

Table with 5 columns: Title of Program, Sponsor, Location, Dates, Points Claimed. Includes three empty rows for data entry.

Total number of points earned: _____

36 Points are Required for Re-Certification.

I hereby certify that to the best of my knowledge, the information in this application is true and complete. I understand that if found otherwise, it is sufficient cause for rejection. I hereby consent to the release of my transcript to the institution receiving this application.

Applicant's Signature _____ Date _____

I further state that I have published the following manuals (actual publication attached):

Title of Publication	Points Claimed
1. _____	
2. _____	
3. _____	
	Subtotal _____

I further state that I have served as lecturer, discussion leader, or speaker at the following events and/or Community Service presentations (copy of letter or certificate from organization attached):

Organization	Topic	Preparation	Presentation	Points Claimed
1. _____				
2. _____				
3. _____				
4. _____				
5. _____				
6. _____				
7. _____				
				Subtotal _____

ADMINISTRATION OF PROGRAM

1. The Accreditation Committee will be established and will consist of:
First Vice Presidents, CCTA / CPTA as Co-Chairs of the Committee, A member of the Continuing Ed Committee appointed by the President of CCTA and a representative from Mesa State College, Office of Extended Studies in an advisory capacity.
2. The CCTA Secretary shall be responsible for the maintenance of permanent files and records.
3. A vote of the entire Accreditation Committee shall be taken on each application sent in and on each decision made which may affect the acceptance or rejection of any application.
4. If for some reason a decision cannot be reached by the Accreditation Committee, the appropriate Executive Board of the CCTA / CPTA will make a determination.
5. An appeal may be made to the Executive Boards by an applicant who is dissatisfied with the final determination of the Accreditation Committee. The decision of the appropriate Executive Board will be final.
6. Members of the continuing education Committee shall include, but are not limited to: Chairman, (to be appointed by the CCTA President)
President-CCTA
President-CPTA
7. The Continuing Education committee will present changes in the Accreditation and continuing Education Program to the Colorado County Treasurers' Association and Colorado Public Trustee Association for vote..
8. The Continuing Education Committee will work with the Executive Boards and the Conference and Seminar Committees to set meetings in order to fulfill requirements of the program, and will designate point values to each class.
9. The Continuing Education Committee will issue official Accreditation Reports at each CCTA / CPTA -sponsored event, if credits can be earned at that event. Copies of these Accreditation Reports are to be included in certification applications

10. The official CCTA / CPTA roster and committee list can be used for documentation in certification applications for:
 - a. Members of the Executive Boards
 - b. District Chairs of CCTA / CPTA
 - c. Chairperson or members of active committees in CCTA / CPTA with minimum of two meetings per year.

County Treasurers and Public Trustees who are speakers, panel members of instructors at a CCTA / CPTA sponsored class or training session, may use the official Accreditation Report for documentation to be included in certification applications.

11. To be eligible for credit, points must be earned during the five year period immediately preceding the date of application for the ORIGINAL Certificate of Accreditation, and the four year period immediately preceding the date of application for RENEWAL of the Certificate of Accreditation.
12. The responsibility for documenting the acceptability of the application and the validity of points rests with the participant.

13. Deadline schedule:

February 15 Application to be received by Accreditation Committee

March 15 Notification sent from Accreditation Committee

April 15 Appeal application sent to Accreditation Committee

Conference Presentation of Certificates

Postmarks will be accepted.