

MUNICIPAL TREASURERS ASSOCIATION OF WISCONSIN

Application to Maintain Certification

Terry Estness, Executive Secretary
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Wauwatosa, WI 53213

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CMTW certification expires five years from the date of certification. Maintaining certification is contingent upon the applicant meeting the General Eligibility, Education and Experience Maintenance Standards outlined in this application.

GENERAL ELIGIBILITY

Each applicant renewing their CMTW certification must meet the following general eligibility standards.

1. Applicant in each of the five years since last certification must have held the position of (i) an elected or an appointed municipal treasurer, deputy or assistant principal officer charged with the performance or supervision of treasury responsibilities as defined by MTA or (ii) an eligible public treasurer. An eligible public treasurer is a person who serves in a governmental entity other than a municipality and whom the Certification Committee determines has responsibilities of a municipal treasurer.
2. Applicant must have maintained continuous "Active" or "Affiliate" membership in MTAW for:
 - (a) each of the five years since last certification
 - (b) at the time of application
 - (c) at the time of approval
3. Applicant must believe in and practice MTAW's Code of Ethics.
4. Applicant must submit one copy of the typewritten application by April 1st or September 1st of the year in which certification expires, accompanied with all required enclosures and required maintenance fee to MTAW Headquarters. Applications are reviewed and verified by the Certification Committee.
5. **Applicant must have earned a total of 50 points in any combination of Education Maintenance Standards points and Experience Maintenance Standards points since last certification.** Certifications must be renewed every five years. Those members with an expired CMTW credential must complete a new Application for Certification.

APPLICATION FEE

A non-refundable fee of Twenty-five Dollars (\$25.00) shall accompany the Application to Maintain Certification.

APPEALS

The Committee Chairman shall notify a candidate whose application is not approved by the Certification Committee in writing. The candidate must appeal the Committee's decision within thirty (30) days of notification letter date. The appeal must be sent in writing to the Chairman at MTAW's Headquarters address. The Chairman shall submit the appeal to the Board of Directors for final determination.

***MUNICIPAL TREASURERS ASSOCIATION OF WISCONSIN
APPLICATION TO MAINTAIN CERTIFICATION***

PERSONAL DATA

Name _____
Last First Middle

Title _____

Employed by _____
(Municipality or Governmental Unit)

Mailing Address _____

Municipality/ State /Zip _____

Telephone _____ Fax _____ E-mail _____

GENERAL ELIGIBILITY

I have held the position of (i) municipal treasurer, deputy or assistant principal officer charged with the performance or supervision of treasury responsibilities as defined by MTA or (ii) eligible public treasurer for each of the five years since last certification.

- ✓ I have been an "Active" or "Affiliate" member of MTA for each of the five years since last certification, at the time of application and at the time of approval.
- ✓ I affirm my belief in and practice MTAW's Code of Ethics.
- ✓ I have enclosed the required Twenty-five Dollar (\$25.00) application fee.
- ✓ I understand that Certifications must be renewed every five years.
- ✓ I hereby certify that I have read the items listed above and comply with those items. I also grant permission to MTAW to verify accuracy of statements and enclosures.

Signature _____ Date _____

APPLICATION DEADLINE: April 1st or September 1st of the year in which certification expires.

_____ Yes _____ No I request MTAW to send news releases of my recertification to local newspapers.

Paper Name _____ Contact Person _____

Address _____ Municipality/ State /Zip _____

_____ Yes _____ No I request MTAW notify my mayor or city manager of my recertification.

Name _____ Title _____ Municipality _____

Address _____ Municipality/ State /Zip _____

EDUCATION STANDARDS

Points towards maintaining the CMTW certification may be earned from the following Education Standards:

- 1) Completion with a C grade or better of college or university courses related to treasury management. One point per credit. **Maximum 25 points.**
- 2) Completion of an MTAW approved state course of higher education conducted under an accredited program. UW-Green Bay Clerk & Treasurers Institute (3 year program). **Maximum 30 points.**
- 3) Attendance at an educational conference of WMCA, WGFOA, Towns Association or League of WI Municipalities. Five points per year. **Maximum 20 points.**
- 4) Attendance at a MTAW district meeting. Two points per meeting. **Maximum 10 points.**
- 5) Attendance at an educational conference of MTAW. Ten points per conference. **Maximum 50 points.** (MTAW Spring and Fall Conferences)
- 6) Attendance at an APT US&C National Conference. Five points per conference. **Maximum 20 points.**
- 7) Attendance at a non-educational organization sponsored training. One point per event.
- 8) Attendance at advanced training sponsored by UW-GB to include Master Academy, Administrators Academy and one-day training sessions. Two points per six-hour day, **Maximum 20 points.**

EDUCATION STANDARDS SUMMARY

	Maximum Points Allowed
Completion of college or university courses related to treasury management (1 point per semester hour)	25
Completion of an MTA approved Municipal Treasurers Institute	30

Attendance at district meetings, training or conferences – points as listed above in #3,4,5,6,7,8

COLLEGE OR UNIVERSITY COURSES RELATED TO TREASURY MANAGEMENT

Course Name _____ Course Number _____

College/University _____

Grade _____ Credit Hours _____ Points _____

Use additional sheet(s) as needed. Enclose copy of transcript.

MUNICIPAL TREASURERS INSTITUTE OR APPROVED EDUCATIONAL PROGRAM

Sponsored by _____ Conducted by _____

Course Dates _____ Date of Completion _____

Use additional sheet(s) as needed. Enclose certification of completion.

Points _____

CONFERENCES, DISTRICT MEETINGS, OTHER TRAINING – POINTS GRANTED AS STATED ABOVE

Date _____ Site _____ Sponsor _____

Date _____ Site _____ Sponsor _____

Date _____ Site _____ Sponsor _____

Date _____ Site _____ Sponsor _____

Date _____ Site _____ Sponsor _____

Date _____ Site _____ Sponsor _____

Points _____

TOTAL EDUCATION POINTS

EXPERIENCE STANDARDS

Points towards maintaining the CMTW certification may be earned from the following Experience Standards:

- 1) Experience as a municipal treasurer or financial officer as defined by MTAW for the five years since last certification. Five points per year. **Maximum 25 points.**
- 2) Service as a member of a committee of MTAW. Two points per year per committee. **Maximum 10 points.**
- 3) Service as a conference committee member or chairperson of MTAW. Five points per conference. **Maximum 10 points.**
- 4) Service as a district director or parliamentarian of MTAW. Five points per year. **Maximum 20 points.**
- 5) Service as an officer of MTAW. Five points per year. **Maximum 25 points.**
- 6) Recipient of MTAW J.J. Krueger Award. **15 points.**

EXPERIENCE MAINTENANCE STANDARDS

	Points	Maximum allowed
Experience as either a municipal treasurer as defined by MTAW, or a public treasurer for the five years since last certification.	5 per year	25
Service as committee member for MTAW	2 per year per committee	10
Service as a conference committee member or chairperson	5 per conference	10
Service as district director or parliamentarian of MTAW	5 per year	20
Service as officer of MTAW	5 per year	25
Recipient of MTAW J.J. Krueger Award	15 per award	15

EXPERIENCE AS MUNICIPAL TREASURER IN LAST FIVE YEARS

CURRENT POSITION

Position _____ from _____ to _____

Employer _____ Total Years _____ @ 5 points = _____ Points

Responsibilities _____

Enclose certification of election or appointment to office.

OTHER POSITIONS HELD IN LAST FIVE YEARS, IF APPLICABLE

Position _____ from _____ to _____

Employer _____ Total Years _____ @ 5 points = _____ Points

Responsibilities _____

Enclose certification of election or appointment to office.

SERVICE AS COMMITTEE MEMBER/CHAIRMAN OR DIRECTOR/OFFICER

Position Held _____ Sponsoring Association _____ Year _____

Position Held _____ Sponsoring Association _____ Year _____

Position Held _____ Sponsoring Association _____ Year _____

_____ Points

RECIPIENT OF MTAW J.J. KRUEGER AWARD

Year/Conference Site _____ Points

TOTAL EXPERIENCE POINTS _____ Points

SUMMARY

TOTAL EDUCATION POINTS _____

TOTAL EXPERIENCE POINTS _____

TOTAL EDUCATION AND EXPERIENCE POINTS _____

(MINIMUM 50)

Applications must be submitted by April 1st to be approved at the MTAW Spring Conference or by September 1st to be approved at the MTAW Fall Conference.

Code of Ethics for the Municipal Treasurer

Professional competence and ethics are parallel concerns for the municipal treasurer. Officials at every level of government are faced with public skepticism. Today's treasurers find themselves watched more carefully by the public, their actions scrutinized for signs of bias or personal interest. Treasurers are held accountable as custodians for public funds, which places them in an especially delicate position.

Ethics are an inducement for treasurers to strive for higher levels of performance. The ethical municipal treasurer must always think in terms of the total public welfare, the overall good, the long-range effect, and eschew the temptation to please just the individual or group pressing its case.

Section 62.09(9)(d), Wisconsin Statutes, states that a treasurer "shall receive no compensation except the salary fixed by the council..." (Emphasis added). It should be obvious to all treasurers, except any engaged in outright corruption, that

the only money they may legally accept for performing their duties is their salary. The troublesome area is that of "other compensation". Also, see section 946.12(5) Wisconsin Statutes.

Treasurers should politely refuse to accept any gifts that are offered to them personally. Such gifts, such as football tickets or other offers of free entertainment, are innocently offered, but such gifts may be difficult, if not impossible, to justify the actual intent, that makes it important to always refuse gifts. A treasurer should not directly or indirectly accept any gift, whether in the form of money, services, loan, travel, entertainment, hospitality, promise, or any other form, under circumstances in which members of the public could reasonably infer that the gift was intended to influence him or her, or could reasonably be expected to influence him or her in the performance of official duties, or was intended as a reward for any official action on the treasurer's part.

It cannot be emphasized enough that it is the appearance, not the actual intent, involved that can be so incriminating in the eyes of the public. Large segments of the public distrust all government officials, whether elected or not, and they will assume guilt, not innocence, whenever there is an opportunity to make a judgment. This is true to a certain degree in all municipalities, especially small communities, where everyone knows every other person's business and rumors run rampant.

Treasurers, and all local government officials, can take affirmative steps to safeguard themselves from the charge of unethical conduct in certain circumstances. The municipality's governing body and all of its officials can formulate and adopt some simple guidelines on unsolicited gifts. Guidelines can be established which allow a local official to accept such innocuous unsolicited gifts as meals and cigars up to a modest maximum dollar level. Guidelines can be very useful in establishing realistic parameters; public officials should not have to be altogether isolated from normal social practices among friends and associates on appropriate occasions. In the absence of any official guidelines, the wise course of conduct is for treasurers to decline gifts.

I agree to abide by the Code of Ethics for the Municipal Treasurer.

Signature of applicant

Date

Send completed form along with appropriate documentation and a check made payable to MTAW to:

MTAW
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