



Municipal Treasurers Association of Wisconsin

Certified Municipal Treasurer of Wisconsin Application to Maintain Certification

SECTION I - PURPOSE OF APPLICATION TO MAINTAIN CERTIFICATION – This Professional Certification Program of the Municipal Treasurers Association of Wisconsin (MTAW) is designed to advance the professionalism of the municipal treasurer, the deputy or assistant treasurer, or other municipal officer charged with treasury responsibility. Maintaining certification is contingent upon the applicant meeting the standards outlined in this application.

SECTION II - DESIGNATION OF PROFESSIONAL TITLE - The professional title awarded by this program is Certified Municipal Treasurer of Wisconsin. The initials CMTW can be used after the name of the certified individual.

SECTION III - ADMINISTRATION OF PROGRAM

- A. The MTAW Education Committee shall administer the Professional Certification Program. The Education Committee prescribes policies regarding the general eligibility and the education and experience standards of the program, considers each applicant for the CMTW award, and recommends approved applicants to the Board of Directors for its approval.
- B. Certifications expire in five years unless an Application to Maintain Certification is submitted by each recipient and is approved by the Education Committee and the Board of Directors. In order to retain certification, applicants must retain active membership in MTAW. If you are between jobs you can retain membership as a Treasurer at Heart.

SECTION IV - 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 MTAW 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 Education Committee determines has responsibilities of a municipal treasurer. In order to retain certification applicants must retain active membership in MTAW. If you are between jobs, you may retain membership as a Treasurer at Heart.
2. Applicant must have maintained continuous MTAW "Active" or "Affiliate" membership 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 application by March 1st or August 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 Education Committee.
5. Applicant must have earned a minimum combination of fifty (50) Education and Experience points, as specified in the Education & Experience sections of this application, since last certification. Certifications must be renewed every five years. Those members with an expired CMTW credential must complete a new Application for Certification.

SECTION V – APPLICATION FEE – A \$25.00 non-refundable fee shall accompany the Application to Maintain Certification.

SECTION VI – APPEALS – The Education Committee Chair shall notify a candidate whose application is not approved by the Committee in writing. The candidate must appeal the Committee's decision within thirty (30) days of written notification. The written appeal must be sent to the Committee Chair at MTAW's Headquarters' address. The Chair shall submit the appeal to the MTAW Board of Directors for final determination.

SECTION VII - PRESENTATION OF CERTIFICATE - The CMTW Maintenance Certificate will be presented to the successful applicant at the next MTAW conference.

CERTIFIED MUNICIPAL TREASURER OF WISCONSIN
Application to Maintain Certification

Applicant _____
 Title _____
 Address _____
 City/State/Zip _____
 Municipality _____
 Phone _____
 Email _____
 Application Date _____

Membership years _____
 Application fee _____
 General eligibility _____
 Education points _____
 Experience points _____
 Total points _____
 EC Chair approval _____
 Board of Directors approval _____

GENERAL ELIGIBILITY (review & check boxes)

- I have held the position of appointed or elected municipal treasurer, deputy or assistant principal officer charged with the performance or supervision of treasury responsibilities as defined by MTAW or an eligible public treasurer for each of the five years since last certification.
- I have been an "Active" or "Affiliate" member of MTAW for each of the five years since last certification, at the time of application and at the time of approval.
- I believe and practice the Code of Ethics of the MTAW.
- I have completed the typewritten application and forward it with all the required enclosures and the required fee of \$25 to MTAW headquarters. Applications are reviewed and verified by the Certification Committee and by the Board of Directors at the fall and spring board meetings.
- I have earned a minimum of 50 Education and Experience Points and understand the CMTW certification must be renewed every five years.
- I grant permission to MTAW to verify accuracy of statements and enclosures.

Active from: _____ to: _____ Signature: _____ Date: _____

_____ Yes _____ No

I request MTAW to send news releases of my certification to local newspapers.

Paper Name _____

Contact Person _____

Address _____ City _____ State _____ Zip _____

_____ Yes _____ No

I request MTAW notify my mayor or city manager of my certification.

Name _____ Title _____

Municipality _____

Address _____ City _____ State _____ Zip _____

EDUCATION

A maximum of 40 points toward certification may be earned from the following Education Standards.
 List total points for each standard.

1. Attendance at a MTAW One-Day Treasurers Workshop.

5 points
Earned: _____

List below:

Date _____ Held at (city, location) _____

2. Attendance at an MTAW educational conference. Ten points per year.

Max. 50 points
Earned: _____

List below:

Date

Held at (city, location)

3. Attendance at a MTAW district meeting or advanced education sponsored by UW-GB, which includes Master Academy, Administrators Academy and one-day training sessions. Two points per 6-hour day.
Enclose proof marked "ED-3".

Max 10 points

Earned: _____

List below:

Date

Held at (city, location)

District number

4. Attendance at the UW-GB Institute one-year Treasurers Completion Course.
Enclose proof marked "ED-4".

30 points

Earned: _____

5. Attendance at the UW-GB Institute one-year Clerks Completion Course.
Enclose proof marked "ED-5".

10 points

Earned: _____

6. Attendance at WMCA, WGFOA, Towns Association, or League of Wisconsin Municipalities educational conference. Two points per conference.
Enclose proof marked "ED-6".

Max. 20 points

Earned: _____

List below:

Date

Held at (city, location)

7. Attendance at APT-US&C annual conference. Five points per year.
Enclose proof marked "ED-7".

Max. 20 points

Earned: _____

List below:

Date

Held at (city, location)

8. Attendance at a training sponsored by a MTAW Municipal Service Provider or college continuing education courses. One point per 8-hour training.
Enclose proof marked "ED-8".

Max. 20 points
Earned: _____

List below:

Course date	Sponsored by	Conducted by
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9. Completion with a grade C or better of college or university courses related to treasury work. Two points per credit.
Enclose proof marked "ED-9".

Max. 20 points
Earned: _____

List below:

Course name/number	College or University	Grade	Hours
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10. Completion of a state or regional course of higher education approved by the Education Committee and by the Board of Directors and conducted by a fully accredited institution of higher education. (UW Green Bay Treasurer's Institute)
Enclose proof marked "ED-10".

Max. 50 points
Earned: _____

List below:

Course date	Sponsored by	Conducted by
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TOTAL EDUCATION POINTS _____

EXPERIENCE

A maximum of 40 points toward certification may be earned from the following Experience Standards.
List total points for each standard.

1. Experience as a municipal treasurer or financial officer. Five points per year. **Max. 25 points**
Enclose proof marked "EXP-1". Earned: _____

List below:

From _____ to _____ Municipality Years

2. Service as a MTAW or APT US&C committee or UW-GB Institute Advisory Board member. **Max. 10 points**
Two points per year per committee. Earned: _____

List below:

Committee Sponsoring Association Years

3. Service as a MTAW committee chair or conference committee chair. **Max. 10 points**
Five points per year per committee. Earned: _____

List below:

Committee Sponsoring Association Years

4. Service as a MTAW or APT US&C director or parliamentarian. Five points per year. **Max. 20 points**
Earned: _____

List below:

Position Sponsoring Association Years

5. Service as a MTAW or APT US&C district officer. Five points per year.

Max. 25 points

Earned: _____

List below:

Office	Sponsoring Association	Years
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6. Receipt of the MTAW J.J. Krueger Award.

15 points

Earned: _____

List below:

Date Received	Conference Site (City)
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7. Instructor of a MTAW approved course. One point per hour of instruction.

Max. 10 points

Earned: _____

Dates of Instruction	Location (City, State)
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8. Publication of a MTAW website technical article. Two points per article.

Max. 10 points

Earned: _____

Name of Article	Website Posting Date
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9. Service as an actively assigned mentor. Five points per year assigned.

Max. 20 points

Earned: _____

Treasurer Assigned To	Year
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TOTAL EXPERIENCE POINTS

SUMMARY

TOTAL EDUCATION POINTS *(Maximum 40 points)*

TOTAL EXPERIENCE POINTS *(Maximum 40 points)*

TOTAL EDUCATION AND EXPERIENCE POINTS *(Minimum 50 points)*

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 of 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 any gifts.

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

Signature of Applicant

Date

Applications must be submitted by March 1st to be approved at the MTAW Spring Conference or by August 1st to be approved at the MTAW Fall Conference. Send completed form along with appropriate documentation and a check made payable to MTAW to:

MTAW
Terry Estness, Executive Secretary
2408 North 67th Street, Wauwatosa, WI 53213
Phone 414/453-1442 - Fax 414/453-0526 – email: mta-wi@att.net

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