




Vivian L. Wood, C.C.T., C.I.O.  
County Treasurer

August 6, 2008

**MEMORANDUM**

To: Dan A. Gattis  
Williamson County Judge

From: Vivian L. Wood   
Williamson County Treasurer

Please accept this letter as a request for a one-time adjustment in the Budget Order policy in regard to the County's paying for overnight hotel accommodation in Austin for my employee Kathy Kohutek.

Kathy is my First Assistant Treasurer and has the ability and responsibility to act in my stead. I believe it is in the best interest of my office and the County for her to attend the Level I County Investment Officer Training sponsored by the Texas Association of Counties. The information on the class and its requirements are attached. The letter from Alice Kanalos, Education Project Manager, for the Texas Association of Counties indicates the level of commitment required to achieve the Level I certification. The Level I course is only offered in Austin or I would certainly require that Kathy attend the training at another site.

I appreciate the opportunity to have my request considered. Please let me know if further information is required.

Attachments

# TEXAS ASSOCIATION *of* COUNTIES

1210 San Antonio • Austin, TX 78701

P.O. Box 2131 • Austin, TX 78768-2131



Karen Ann Norris, Executive Director

July 30, 2008

Honorable Vivian L. Wood  
Williamson County Treasurer  
710 South Main Street, Suite 105  
Georgetown, TX 78626-5703

Dear Vivian:

We are pleased to welcome your First Assistant, Kathy Kohutek, as a member of the 2008 County Investment Officer Class. As you know, it is approximately 40 hours of sessions with difficult subject matter. I am including an agenda from last year. The topics never change but are updated every year. The teachers may change from year to year.

In order for the class registrants to receive their CIO designation, they must take the exam on Saturday morning. It is an open book exam which they have 4 hours to complete. The passing grade is 75%. The successful candidates must continue their education yearly to maintain their certification.

I have a room block at the Holiday Inn Austin on Town Lake. During the evenings at the hotel, the students usually find a few classmates and make up study groups. A great deal of learning is entailed to understand the subject matter, since an extensive amount of material is covered. The study groups are very beneficial to the students. On Wednesday, the teachers distribute a mid week test to be completed by the class that evening and they dismiss the class early. The following morning, the test is reviewed and the class has an opportunity to get extra help for any question they missed. We keep the classes small so extra help is available, if needed.

Several classes are designed so that the registrants fully understand the Texas Public Funds Investment Act and what duties this legislation requires of the investment officer. It is a seven day course, starting on Sunday, October 5, 2008 and ends after the exam on October 11.

I will be sending a letter to Kathy and the rest of the class, very soon. Please make sure Kathy calls the hotel and asks for the Texas Association of Counties' room block. Their reservation number is 1-888-615-0509. The hotel has a van to provide transportation to and from the hotel and the Event Center on the 4<sup>th</sup> floor of the Texas Association of Counties facility, if the students do not have a car. We will provide a light breakfast and lunch for the registrants each day.

Sincerely,

Alice Kanelos  
Education Project Manager



TEXAS ASSOCIATION of COUNTIES

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## Education Center

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- TAC Loss Control Regional Workshops
- Annual Conference
- County Judges & Commissioners Association Conference
- County Investment Officer Training, Level I

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## EDUCATION CENTER

## 2008 County Investment Officer Training, Level I

[Register](#)
[Go to events calendar](#)
**October 5-11, 2008**

Texas Association of Counties Events Center  
 1210 San Antonio Street, 4th Floor  
 Austin 78701  
 512-478-8753

**Overview**

In today's modern world, sound management of a county's financial assets can mean the difference between an embarrassing financial and investment returns that can stretch precious tax dollars. Prudent, professional management of public funds requires specialized knowledge and expertise keep a county's finances in optimum health. Investment laws, the current economy and other factors must be taken into consideration when implementing a county's financial strategy. But proper and frequent training can keep public investors from getting overwhelmed.

The Texas Association of Counties County Investment Officer Training Program provides the best ways to accomplish this. County officials seeking to demonstrate competency with investment laws and operational best practices have the opportunity to earn certification as a certified County Investment Officer (CIO) through this program.

CIO Level I is an introductory course providing comprehensive, in-depth education involving approximately 35 hours of classroom instruction. After classroom instruction, an optional examination is offered for those wishing the CIO credential. You may view [additional information](#) on the program or call 512-478-8754.

**Who should attend CIO classes?**

Auditors, treasurers, commissioners, court members and other county personnel who oversee investments.

**Date****October 5-11, 2008****Location****Austin**
**Registration Information** - [Sign up today and register online!](#)
**Hotel Information** - [View hotel information for this event.](#)
**Scheduled Activities** - [Interested in the schedule of activities?](#)
**Agenda** - [View the agenda for this event.](#)