

**Winfield Township**  
Administrative Policies and Procedures  
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## **1.0 INTRODUCTION**

### **1.1 Purpose**

This administrative policies and procedures manual is adopted to provide for the efficient and uniform application of administrative policies in Winfield Township, where such procedures have not been provided for under state law.

## **2.0 TOWNSHIP BOARD ADMINISTRATION**

### **2.1 Township Board Powers**

The township board of Winfield Township retains the power to determine the administrative policies and procedures for Winfield Township, except where the law of the state of Michigan have assigned such power to a specific elected township official. The authority to adopt any administrative policy or determine appropriate procedures not provided for in this manual or provided for by State law shall be retained by the township board. The township board also reserves the right to alter, modify, amend or repeal any or all provisions of this administrative policies and procedures manual.

### **2.2 Authority Delegated from the Board**

In the interest of promoting the efficient operation of the township and pursuant to MCLa41.96, as well as implied powers of the township board, the Winfield Township board assigns to various township elected and appointed officials the authority to exercise the following non-statutory administrative responsibilities, in accordance with the specific policies and procedures contained herein.

### **2.3 Authority to Interpret the Provisions of this Manual**

The township Supervisor shall provide to the department heads and employees interpretations to implement the provisions of the administrative polices and procedures manual. These interpretations shall be considered authoritative and binding unless the interpretation is appealed to the township board. Any such appeal shall be made at the next regular meeting of the township board. The township board may uphold, overturn or alter all or part of any interpretations made pursuant to this section.

### **2.4 Board Meeting Administration**

#### **2.4(a) Posting meetings**

The township clerk shall be responsible for posting all regular and special meetings of the township board in conformance with the Michigan Open Meetings Act. The posting of all meetings of the various township boards and commissions that are required to conform to the Open Meetings Act shall be the responsibility of the clerk or committee.

#### **2.4(b) Meeting Agenda**

The township supervisor (*amended, 04/03/2002*) shall prepare the agenda at least 2 days prior to every township board meeting. Any board members, residents, Department Heads who

desire to have an item placed on the agenda will notify the supervisor at least 7 days prior to the meeting, listing in writing, the subject matter to be placed on agenda. A copy of the proposed agenda shall be delivered or made available to every board member, along with all supporting documentation and correspondence addressed to the township board, at least 2 days prior to the board meeting.

When a need to place an item on the agenda arises after this deadline, the business item may be added to the agenda by general consent of the board.

The proposed agenda shall be approved by majority vote following the roll call of board members at each board meeting.

The agenda shall conform to the following format:

1. Call to order
2. Pledge to flag
3. Roll Call
4. Approval of meeting agenda
5. Approval of minutes
6. Treasurers report
7. Reports from boards or committees
8. Public comment ( brief)
9. Old Business
10. New Business
11. Correspondence
12. Payment of Bills
13. Current & Delinquent Bills
14. Adjournment

#### 2.4(c) Public Comment

Members of the public shall have an opportunity, under Brief Public Comment, to address the board for no more than 5 minutes or a total of 20 minutes on any item that is not on the agenda.

#### 2.4(d) Board Consultants

The township board reserves to itself the authority to appoint the following consultants:

1. Attorney
2. Auditor
3. Planner
4. Assessor *(added 04/03/02)*

A letter of agreement shall be executed between the board and each consultant that will address the following:

1. Term of the agreement
2. Description of services
3. Method of payment (retainer, hourly or by product)
4. Schedule of payment
5. Documentation of services provided

6. Method of resolving disputes
7. Which township officials are authorized to direct work or assign task to consultant.

The term of the agreement with any consultant shall not exceed the end of the current board's term of office.

The board shall establish a line item for consulting services within the cost center of each township official who is authorized to assign tasks to a consultant. The official may incur costs in utilizing a consultant up to the amount appropriated by the board.

#### 2.4(e) Litigation

The initiation of any lawsuit, litigation, claim for injunctive relief or writ of mandamus shall require a majority vote of the township board, except when there are extenuating circumstances, as defined below.

Extenuating circumstances are defined as an emergency situation or a situation in which a violation of any state, federal or local ordinance constitutes a public nuisance or otherwise endangers the public and in which the continued existence of such a condition, emergency or violation shall be detrimental to the health, safety and welfare of the township.

Extenuating circumstances also include any case where the continued existence of any condition, emergency or violation may jeopardize the legal position of the township in securing the intended remedy in any lawsuit, litigation or other proceeding.

The initiation of a lawsuit, litigation or other proceeding for extenuating circumstances shall be allowed only upon the written directive of Supervisor, Clerk and Treasurer. In the event that such action is taken, the matter shall be brought to the board's attention at its next meeting. The board shall meet in closed session to discuss the litigation, including the reasons for initiating legal action, without the full board's prior review and approval.

#### 2.4 (f) Direction and Control of Day-to-Day Administration

To promote efficient administration, the township board authorizes the Supervisor to provide day-to-day direction and control over all township activities that are not assigned by state law to another official, and to provide a liaison between the board and the various township departments.

Board members should make all inquiries, request or complaints directed at department heads or employees to the township Supervisor. Any directives, complaints or requests made by a member of the board directly to a department head or employee, other than from an elected official with statutory authority over the department head or employee, shall be brought to the attention of the Supervisor prior to initiating any response.

### **3.0 PERSONNEL ADMINISTRATION**

#### **3.1 Personnel Officer**

To provide for efficient and uniform administration of personnel matters, the township board will appoint a board member as personnel officer.

##### **3.1 (a) Personnel Officer's Duties**

1. Develop job descriptions for all township positions.
2. Update job descriptions as needed, at least every three years.
3. Provide all new employees with current copy of the township personnel policies and procedures manual.
4. Monitor changes in state and federal law that effect township policies.
5. Recommend to township board when necessary changes.
6. Determine appropriate pay grade or compensation for all employees, subject to board policies and appropriations.
7. Authorize departments heads to impose employee sanctions that exceed severity of a verbal or written warning.
8. Develop and implement a standard employee evaluation form to be used by department heads.

#### **3.2 Employee Record Keeping**

##### **3.2 (a) Personnel Records**

The township clerk shall maintain a permanent personnel record of each township employee. Each employee's personnel file shall contain the following:

1. Personal data, including full name, Social Security number, current address, resume or application submitted and physical examination (if required)
2. Performance evaluations
3. Use of authorized leaves.
4. Commendations and or disciplinary actions.
5. Tax withholding information.
6. Beneficiary information.
7. Record or positions held
8. Insurance and pension records

##### **3.2 (b) Confidentiality of Personnel Files**

The contents of the employee personnel files shall be considered confidential. Any employee may examine the contents of his or her personnel file under the direct supervision of the clerk. Board members and the personnel officer shall be provided viewing of any personnel file. The contents of an employee's personnel file shall not be removed by anyone. Confidential information contained in a personnel file shall be released to others only with

the written authorization of the employee. Personnel files will be kept for at least five years following an employee's termination.

### 3.2 (c) Freedom of Information Act Requests for Personnel Files.

Requests for copies of documents contained in the personnel files that are made pursuant to the Freedom of Information Act will be release only after confidential information that may be contained on the document is deleted. The clerk may contact the township attorney for advice in responding to a Freedom of Information Act request involving personnel records. Pursuant to the Michigan Freedom of Information Act, the township supervisor, after consulting with the township attorney, shall notify in writing any part requesting confidential information that the request is denied.

### **3.3 Classification and Compensation**

The township board shall establish and equitable compensation system for township employees. The board shall determine a pay range for all township positions.

### **3.4 Employee Safety**

### **3.5 Authorized Work Force**

### **3.6 Employee Selection**

The personnel officer or board member shall utilize the following procedures in filling any vacant employment positions:

3.6(a) A notice of position vacancy shall be developed, based on the current job description and discussions with department head. The posting shall provide the title, brief position description, education and experience requirements, current pay grade, application deadline and township's equal employment opportunity policy.

3.6(b) The position vacancy notice shall be published in the local paper and with board approval in selected trade journals.

3.6(c) The applications or resumes submitted with be screened with the department head, and a list of qualified candidates will be developed.

3.6(d) Interviews will be conducted with the department heads participation. Any additional screening procedures, such as employment testing or assessment center shall require prior board approval. At least three non-related references shall be contacted.

3.6(e) The selected candidate shall be submitted to the township board. The board may schedule an interview with the candidate at a board meeting. Following board concurrence, the candidate will be offered the position, pending the satisfactory completion of a physical examination and suitable background check.

### **3.7 Employee Supervision**

Department heads shall provide direction to employees in a manner that complies with the provisions of this administrative policies and procedures manual, as well as all federal and state laws, township ordinances and the township personnel policies manual.

### **3.8 Employee Evaluation**

3.8(a) In accordance with current employment law and court cases, Winfield Township considers that all employees are employed on an “at will” basis. This means that both the employee and the employer are free to terminate the employment relationship at either’s discretion. *This paragraph added as amendment, June 13, 2002.*

3.8(b) All new employees shall be considered orientation employees for a period of at least six months following their initial date of employment. They will have a written evaluation at the end of three months, and six months. An orientation employee may be discharged pursuant to Section 3.9(a) without recourse to the appeal process provided in Section 3.9(b). All non orientation employees will be evaluated by their department head at only year intervals, within one month of the employee’s anniversary date. Department heads shall be evaluated by a representative from the township board.

### **3.9 Employee Discipline**

Department heads may administer verbal or written warnings pursuant to guidelines adopted in the township personnel policies and manual.

#### **3.9(a) Suspension or Discharge**

The application of suspension or discharge shall be authorized by the personnel officer, pursuant to guidelines adopted in the township personnel policies and procedures manual.

#### **3.9(b) Appeals**

A suspension or discharge may be appealed within three days or at the next township board meeting whichever comes first. Appeal shall be requested in writing to the township board.

### **3.10 Employee Recognition**

Department heads shall bring to the attention of the board any incidences of meritorious conduct by any township employee, volunteer or appointed official. Township Board may recognize them by adoption of resolution of tribute.

### **3.11 Ethical Standards**

All elected and appointed officials, employees and volunteers shall fulfill their duties with the utmost attention to serving the best interests of the township citizens, and no official, employee or volunteer shall participate in a decision or transaction on behalf of the township that would result in a direct financial benefit to the township official, employee, or volunteer.

Any official, employee or volunteer who believes that he or she may be placed in a potential conflict of interest shall immediately notify the township board and any subsequent action shall be in conformance with state law.

No employee shall accept employment that conflicts with performing his or her township duties.

No officer or employee shall accept any gift or consideration from a person or company providing goods or services to the township, or who is soliciting township business.

### **3.12 Job Descriptions**

Job descriptions of Winfield Township employees to be found in Appendix A

*Amended, 04/03/2002*

## **4.0 Financial Administration**

### **4.1 Accounts Payable**

#### **4.1(a) Department Head Authorization**

All request for payments, i.e. invoices or expense vouchers, shall be processed in accordance with Section 4.8(d) of this manual, and shall be approved by the department head responsible for the cost center to which the expense shall be posted. The department head shall indicate that the expense is authorized and correct by affixing the account number and his or her initials to the invoice. All approved bills must be submitted to the clerk at least seven (7) days prior to the board meeting at which claims will be audited.

#### **4.1(b) Accounts Payable Reports**

The clerk shall prepare an accounts payable report to the board showing the vendor name, nature of the expense and check number. Any items paid prior to board audit, as discussed in Section 4.8(e), shall be noted on the accounts payable report.

The clerk and treasurer shall sign the checks for all claims approved by the board. A copy of the check shall be filed with the invoice claim in the clerk's office.

## **4.2 Payroll**

### 4.2(a) Time Cards

All completed time cards shall be submitted to the clerk on the day following the end of each pay period. Time slips will be signed by both the employee and the employee's department head.

### 4.2(b) Deductions and Withholding

The clerk shall be notified at least seven (7) days prior to the end of the pay period of any changes in voluntary deductions or withholding allowances desired by an employee. All voluntary deductions shall be authorized in writing.

### 4.2(c) Pay Advances

Pay advances shall not be authorized under any circumstances. Employees may make arrangements for direct deposit of payroll checks issued while on leave.

### 4.2(d) Payroll Problems

Employees will immediately notify the clerk of any problems or errors on their paychecks. A written account of the problem and its resolution shall be created by the clerk.

### 4.2(e) Deputy Compensation

Deputies for the offices of supervisor, clerk, and treasurer may earn a maximum of 10% of the officeholder's annual salary.

## **4.3 Cash Receipts**

### 4.3(a) Authorization to Receive Cash

The following employee positions are authorized to receive cash: Clerk/Deputy Clerk, Treasurer/Deputy Treasurer, and Assessor. *(amended 04/03/02)*

### 4.3(b) Fiduciary Bonds

All employees authorized to receive cash shall be bonded to the following amounts:

|                      |          |
|----------------------|----------|
| Clerk                | \$10,000 |
| Treasurer            | \$15,000 |
| Zoning Administrator | -0-      |
| Assessor             | -0-      |

### 4.3(c) Receipts

Receipts consist of cash and checks. A pre-numbered township receipt shall be issued for all cash, including checks, received by a township employee. The receipt shall include the amount received, name of the payer, and purpose. For a specific group of receipts, a single receipt may be issued for the aggregate of all such receipts received by mail for a given day. In addition, all remittance advices received (see Section 4.4 (c)) shall be attached to the pre-numbered receipt form. Departments that receive funds shall turn over all funds when the amount reaches \$100 or monthly to the treasurer. The treasurer shall issue a receipt to the collecting department for all funds received. The treasurer shall determine periodically that all pre-numbered receipts have been returned with funds or have been otherwise disposed.

#### 4.3(d) Deposits

Total funds collected shall be reconciled to the sum of the pre-numbered receipts and shall be deposited at least weekly in the appropriate township bank account. The following positions are authorized to make bank deposits: Treasurer, Clerk.

#### 4.3(e) Bank Reconciliation

The cash balances of the various fund ledgers shall be reconciled to the bank statements monthly. The cash balances should be the result of the cash receipts and disbursement activities and shall be derived from the same accounting records used in preparing the financial reports discussed in Section 4.5(a).

### 4.4 Accounts Receivable

#### 4.4(a) Revenue collection

The following positions shall be responsible for collecting revenues due to the township:

| <u>Official</u>  | <u>Revenue Source</u>   |
|------------------|---|
| Treasurer/Deputy | Building permits ( <i>amended 04/03/2002</i> )  |
| Treasurer/Deputy | Business Licenses ( <i>amended 04/03/2002</i> )   |
| Clerk            | Cemetery Lots   |
| Clerk            | Fire Department runs  |
| Supervisor       | Freedom of Information Act requests, miscellaneous income                                       |
| Clerk            | Intergovernmental contracts   |
| Assessor         | Land Division   |
| Clerk            | Parks and recreation activities   |
| Clerk            | Utility bills   |
| Treasurer        | Zoning-related activities; special use permits, site plan reviews, rezoning requests, variances |

All invoices shall include a remittance advice to be returned to the township with payment. The remittance advice shall include the name, amount invoiced, and purpose.

#### 4.4 (b) Posting and Distribution

A listing of all invoices or bills owed the township shall be prepared by the clerk and presented to the board monthly.

#### 4.4(c) Method of Accounting

For all remittance advices received in accordance with Section 4.3(c), the treasurer shall credit the receivable. A monthly listing of all amounts invoiced but not yet received shall be prepared and reconciled to the general ledger as discussed in section 4.4(b).

### **4.5 Financial Reporting**

#### 4.5(a) Periodic Expenditure and Revenue Report

The clerk shall prepare a quarterly financial report for the board, and monthly the last quarter of the fiscal year. The report will be current through the last day of the previous month, and shall be presented to the board at its meeting each month. The financial report for each fund will show the following information for revenues and expenditures:

1. Account number
2. Amended budget
3. Current period
4. Year to Date
5. Budget Balance

#### 4.5(b) Periodic Balance Sheet Report

The treasurer shall prepare a monthly balance sheet showing the assets, liabilities, and equities for each fund.

#### 4.5(c) Investment Performance Report

The treasurer shall prepare a monthly report of all interest-bearing activities, including the name of the financial institution, type of investment, anticipated yield and date of maturity.

#### 4.5(d) Financial Reports Review

The clerk shall review the financial reports prior to the board meeting and shall recommend to the board any necessary budget amendments or fund transfers.

### 4.6 Inventory of Fixed Assets

#### 4.6(a) Responsibility

The clerk shall maintain an inventory of the township's fixed assets that are tangible, have an expected useful life of at least one year and have a value of at least \$10.

#### 4.6(b) Updating

The clerk shall add or remove fixed assets from the inventory at the time of acquisition or disposal. The inventory shall include the following information on each asset:

1. Check number
2. Acquisition date
3. Name and address of vendor
4. Description
5. Responsible department
6. Location
7. Acquisition cost (if gift, estimated fair value at time of donation)

#### 4.6(c) Inventory responsibility

Department heads shall annually inventory all assets assigned to their department and submit the inventory to the clerk.

#### 4.6(d) Disposal of Fixed Assets

Department heads shall make note on the annual inventory, or shall notify the clerk sooner if desired, of any equipment that would be appropriate for disposal. The clerk shall prepare a list of all such equipment recommended for disposal and shall submit the recommended disposal of fixed assets list to the board for approval. The board shall determine the method of disposal, which may include sealed bids, auction, negotiated sale, gift or disposal. Township officials and employees are not eligible to purchase township fixed assets by negotiated sale without the approval of the board. An elected official shall refrain from voting on any negotiated sale involving the elected official.

### **4.7 Budgeting**

#### 4.7(a) Designation of Budget Officer

The Supervisor shall be the township budget officer and shall be responsible for the development and administration of the township budget.

#### 4.7(b) Timetable

The proposed budget shall be developed according to the following schedule:

| <b>Date</b> | <b>Activity</b>   |
|-------------|---|
|             | Budget policies developed by township board   |
|             | Informational meetings for department heads   |
|             | Department heads submit proposed line item revenue and expenditure plans<br>To budget officer |
|             | Budget officer meets with department heads  |
|             | Budget officer presents proposed budget to township board                                     |
|             | Township board adopts tentative budget  |
|             | Budget public hearing held by township board  |
|             | General Appropriations Act adopted  |

#### 4.7(c) Adoption

Unless note in the General Appropriations Act, all township funds are adopted on a cost center basis.

### **4.8 Expenditure Control**

#### 4.8(a) Written quotations and sealed bids

Any purchase for goods or services exceeding a contract of \$2,500 shall require the department head to obtain at least three written quotes prior to being issued a purchase order.

Any purchase for goods or services exceeding an estimated contract cost of \$2,500 shall require the solicitation of sealed bids. The supervisor, in consultation with the department head, shall develop bud specifications. Bid specifications shall be approved by the township board. A department head may request permission from the township board to waive the bidding requirements when there is only one know supplier or there is some other compelling reason to waive the bid procedure. The township board reserves the right to extend or renew existing contracts.

The invitation to bid or request services shall be published at least once in the local newspaper and shall be sent to parties who have notified the township of their interest in submitting bids on the goods or services being purchased. Sealed bids shall be opened at a township board meeting at a pre-announced date and time, and any interested party may be present for the bid opening. The clerk or deputy clerk, along with the department head, shall be present for the bid opening.

The criteria for awarding bids shall be as follows:

1. Cost.
2. Reliability.
3. Cleanliness.
4. Sufficiency of equipment.
5. Insurance.
6. References.
7. Good communication.
8. Township taxpayer.

Any board member or department head who has any ownership or other interest in a company submitting a bid shall disclose the conflict of interest to the board, and that official shall not participate in awarding the bid. Township Board reserves the right to refuse any or all bids. Board reserves the right to renew or extend an existing contract. *(amended 04/03/02).*

#### 4.8(b) Expenditure authorization

The township shall not be responsible for any obligations incurred by an official or employee that is contrary to the provisions of this administrative policies and procedure manual.

Department heads shall not consider appropriations contained in the budget as a mandate to expend township funds, nor does the budget constitute authorization to commit the township, as such authorization originates from the provisions of Section 4.8 of this policy and procedures manual. No obligations shall be incurred against, and no payment shall be made from, any appropriation account unless there is a sufficient unencumbered balance in the appropriation and sufficient funds are or will be available to meet the obligation.

Department heads shall obtain prior authorization form the township board prior to obligating the township for expenditures of the following nature:

1. Seminars and conferences.
2. Memberships.
3. Out-of-state travel.
4. Professional services.
5. Equipment repair.
6. Monthly expenditures exceeding \$100.

#### 4.8(c) Emergency expenditures

In the event of an emergency, expenditures may be approved by the supervisor and one other board member.

#### 4.8(d) Processing of Claims

Requests for payments to vendors shall be documented in writing by a vendor invoice or, in the few instances where no invoice is forthcoming, by a written request by the department head requesting payment. Except for rare exceptions, only original invoices shall be processed for payments, as statements or copies of invoices may result in duplicate payments.

Employee expense reimbursements shall be documented on an expense voucher prepared by the employee. The expense voucher shall include the following:

1. Vendor name
2. Purpose of payment request
3. Unit price and units delivered (if applicable)
4. Date goods delivered or services rendered
5. The related purchase order (if applicable)

The department head who is responsible for the budgetary cost center to which the expense will be charged shall affix the account number to the invoice and shall initial the document. Initialing the payment request shall indicate all of the following are true: the goods have been delivered or the services have been rendered to the township; the expense complies with the procedures outlined in sections 4.8 (a,) (b,) and (c) of this manual; all prices and units agree with the purchase order, if applicable, or any differences have been reconciled; the payment request is mathematically correct, and the account number being charged is the appropriate budgetary allocation for this expense.

#### 4.8(e) Board Audit

All claims shall be approved by the township board prior to payment except for the following:

1. Utility bills

These claims shall be post-audited at the next board meeting.

The supervisor and one board member may authorize emergency expenditures when deemed essential due to the imminent threat to the health, safety and welfare of the township.

### **4.9 Expense Reimbursements**

#### 4.9(a) Request Form

The township shall reimburse all officials and employees for necessary expenses incurred in performing their duties. All requests for expense reimbursement shall be made on the proper expense reimbursement form.

#### 4.9(b) Reimbursement Rates

1. \$0.345 per mile outside the township when the employee uses his or her own vehicle and a township vehicle is not available;
2. \$0.15 per mile when, at the employee's option, his or her own vehicle was used, yet a township vehicle was available for use.

Reasonable meals and lodging expenses will be reimbursed up to \$25 per day with receipt. Any reimbursement in excess of this amount shall be approved by the township board prior to incurring the expenses.

#### 4.9(c) Personal Expenses

Receipts shall accompany any reimbursement requests. Commuting from residence to the township hall or the employee's official work station shall not be eligible for reimbursement. Board and committee members shall not receive mileage to attend board meetings that are a statutory duty of their office. Personal expenses that are unnecessary in conducting township business, such as entertainment and alcohol consumed, shall not be eligible for reimbursement.

#### 4.10 Investments

##### 4.10(a) Authorized Institutions

The township treasurer is authorized, by approval of the board, to invest surplus funds in Michigan banks, savings and loan associations, and credit unions that belong to the Federal Deposit Insurance Corporation, or are insured by the National Credit Union Administration.

Lawful investment instruments that are not available from the above-named financial institutions may be purchased from brokerage firms that are licensed by the United States Securities and Exchange Commission.

Financial institutions shall be selected on the basis of their record of satisfactory performance, financial stability and anticipated yields.

##### 4.10(b) Authorized Instruments

The treasurer is authorized to invest in the following instruments:

1. Bonds, securities and other obligations of the United States or an instrumentality of the United States in which the principal and interest is fully guaranteed by the United States.
2. Certificates of deposit.
3. Savings accounts.

4. High grade commercial paper, rated within the three highest grades by at least two national rating services; the term to maturity may not be more than 270 days, and no more than 50% of any fund may be invested in commercial paper at any time.
5. Bankers acceptances of United States banks.
6. United States government or federal agency obligation repurchase agreements.
7. Money market mutual funds composed of investment vehicles which are permitted under state law for direct investments.
- 8.

The treasurer shall select investment instruments that protect principal as the primary goal. While it is also highly desirable to optimize yield, the most important objectives are the safety of the investment and liquidity to meet the township's cash needs.

#### 4.10(c) Notice of Investment Policy

The senior management of any firm, dealer, broker or financial institution shall be given a copy of the township's investment policies prior to the treasurer investing or depositing any township funds in such institution.

#### 4.10(d) Performance Reports

The treasurer shall quarterly report to the board on the status of township investments, including the name of the financial institution, type of investment instrument, date of maturity and anticipated rate of return.

### **4.11 Audits**

The township board will engage a certified public accountant to annually audit the financial systems of the township. An audit contract may be for a period of up to three years, but shall not exceed the current board's term of office. The request for proposals for audits shall require:

1. Proposal due date
2. Date award will be made
3. Date contract begins
4. Length of audit contract
5. Audit period covered
6. Earliest date that audit work may begin
7. Due date for audit report
8. Funds to be audited
9. Requirement of unqualified opinion or clear statement of qualifications
10. Financial statements and other information to be provided by township
11. Other services to be performed by auditor, if any
12. Procedures for determining adequacy of internal controls and accounting
13. Authorization to disclose any irregularities

14. Audit shall be performed in accordance with generally accepted auditing standards set forth by the American Institute of Certified Public Accountants
15. Audit shall be reviewed with the township board
16. Number of copies that will be provided
17. Auditor's qualifications
18. References for firm and individuals performing the audit
19. Estimated hours required, current rates and total anticipated amount

## 5.0 **PROPERTY MANAGEMENT**

### 5.1 Hours of Business

The township hall shall be open to the public at designated time and shall be closed at designated time on every normal business day.

### 5.2 Building Access

The first person arriving each morning should make sure that all public access doors are unlocked.

Prior to leaving, each employee will make his or here work station secure by checking that computers, typewriters, calculators and lights are turned off; filing cabinets and cash drawers are locked, and windows and doors are locked.

The last person to leave the township hall at night shall check to see that all equipment is turned off, doors and windows, locked, lights turned off, except for security lights and the security system is activated.

Persons working after hours are responsible for turning off the lights and office machines used and checking that all doors and windows are secure.

Outside lights shall be turned on prior to any evening meeting and shall be turned off by the last person leaving the meeting.

### 5.3 Security

#### 5.3(a) Keys

The following positions are authorized to receive a key to the main door as determined by the Township Board:

1. Supervisor
2. Clerk
3. Treasurer
4. Trustees
5. Fire Chief
6. Zoning and Planning Chairman

7. Zoning Administrator
8. Assessor

*(List amended 04/03/02)*

If a key is lost, the official shall be informed immediately. A replacement key shall be issued. If the supervisor has reason to believe that the missing key may be used for unauthorized entry, new locks will be installed. Upon termination of employment, the employee shall return his or her office keys to the township supervisor. No person shall duplicate a key without authorization from the township supervisor or make a key available to any unauthorized person. Each department head shall determine who shall be issued a key to the department's door or any secured facilities, such as a safe, cash drawer or filing cabinet, within the department.

#### **5.4 Safety**

No boxes, files and other items shall be stored in hallways, stairs and landings. Flammable liquids, and power equipment shall not be stored in the township hall. Other flammable materials will not be stored in the furnace room. In the event of a fire, all employees will immediately exit the building. All employees shall gather at the flagpole for a head count.

#### **5.5 Use of Township Equipment, Labor or Premises**

##### **5.5(a) Lost or Damaged Equipment**

Any lost or damaged equipment shall be reported immediately to the employee's department head.

##### **5.5(b) Personal Use of Township Property**

The personal use of the township premises, equipment, machines, tools, supplies, postage or personal use of township labor, shall be prohibited.

##### **5.5(c) Phone Calls**

Employees are permitted to make brief personal long distance phone calls. Calls will be reimbursed to the township.

##### **5.5(d) Copier**

Employees may use the township copier for personal business, but shall reimburse the township at the rate established by the board.

##### **5.5(e) Bulletin Boards**

Employees who wish to post notices on township bulletin boards must have the prior approval of the clerk.

##### **5.5(f) Vehicles**

Employees may be directed by a department head to take a township vehicle to their residence due to the nature of their work, such as responding to emergency calls. Department heads may also authorize a township car to be driven to and from work because

of the lack of a secure place to store the vehicle during hours the office is closed. The use of a township vehicle is not an employee fringe benefit, and personal use is prohibited. Employees may use the care for personal errands, such as making a stop on the way to and from work, so long as no additional mileage or other cost is incurred to the township.

## **5.6 Public Use of Township Facilities**

### **5.6(a) Availability**

Township Hall is available for use by any organizations.

### **5.6(b) Reservations**

Rental agreements shall be made available at the office of the township clerk. The clerk shall record each reservation on a facility calendar, on a first-come, first served basis.

### **5.6(c) Fees**

The following fees shall be charged for use of township facilities: Hall \$25.00 per day. The fee shall be paid at the time the key is picked up or township official opens the hall. The renter must return chairs and other equipment to their place of storage. Floors must be swept and any trash bagged. Failure to reasonably clean the facility after use could result in charging for cleaning expense.

### **5.6(d) Denial of Facilities**

The township board reserves the right to refuse use of the facilities for cause.

### **5.6(e) Alcoholic Beverages and Smoking**

Alcoholic beverages and/or smoking will not be permitted on the premises.

### **5.6(f) Damages**

Damages to township property shall be the responsibility of the renting party.

## **5.7 Routine Maintenance**

### **5.7(a) Responsibility**

The township supervisor shall be responsible for monitoring the need for repairs and improvements to township property. The supervisor shall use the township purchasing and bidding procedure, as outlined in Section 4.8(b), to procure snow removal services, fire extinguisher inspections and non-emergency repairs to township buildings, land, equipment, and vehicles.

### **5.7(b) Emergency Repairs**

The supervisor is authorized to contract for emergency repairs up to a cost of \$500.00 without prior board approval, when a delay in initiating a repair will have a significant impact on township operations or finances.

## **6.0 Public Information**

### **6.1 Public Contact**

#### 6.1(a) Courtesy

The primary goal of the township is to serve the public. It is the policy of Winfield Township that all officials and employees will respond to requests for township information from members of the public with courtesy and efficiency. All officials and employees shall communicate with the public in such a way that the image of the township government as friendly, courteous and efficient is fostered and maintained.

All visitors to the township hall shall be greeted in a friendly, helpful manner. The receptionist shall be under the day to day supervision of the Clerk, who shall ensure that the public needs are being met.

Phone calls to the township shall be answered, "Winfield Township, how may I direct your call?" or "Winfield Township, (department) Department, how may I help you?"

Department heads shall make every effort to see visitors who need their assistance. When workload or other commitments do not allow for an immediate meeting, the visitor will be asked to make an appointment at a mutually convenient time.

#### 6.1 (b) Complaints and Problems

If a citizen has a problem that is outside the jurisdiction or responsibility of the official or employee, the citizen will be directed to the appropriate office or official.

Complaints or other concerns received from a citizen shall be received with courtesy. The official or employee will make every effort to resolve a complaint or problem, within the official's or employee's scope of authority. Department heads will be notified of all complaints.

The township Supervisor shall also be notified in writing of any citizen complaint arising from official or employee conduct or the administration of a department or township board policy or procedure. The notice shall include the name and address of the citizen, the nature of the complaint and how the complaint was resolved. The Supervisor may make a subsequent inquiry with the citizen to ensure that the issue was resolved to the citizen's satisfaction.

### **6.2 Public Information Officer**

The Supervisor shall be the public information officer for the township and shall be responsible for supervising the township newsletter, preparing public service Announcements and media releases on township government events and responding to inquiries from the media or referring contact to other appropriate township officials.

Township employees will notify the public information officer prior to making any statements to the news media. Department heads will notify the public information officer of all media contacts.

### **6.3 Public Notices**

#### 6.3(a) Meeting Notices

The Township clerk shall be responsible for posting all regular, special and rescheduled board meeting in conformance with the Open Meetings Act and other state laws. The chairperson of each township board or commission will notify the clerk of all special and rescheduled meetings.

#### 6.3(b) Public Notices

The township clerk shall also be responsible for publishing and mailing all public notices required by state law, including:

1. Board of review meetings.
2. Planning commission/zoning board hearings
3. Budget public meetings
4. Zoning board of appeals variance hearings
5. Special assessment district hearings
6. Election notices
7. Master plan adoption and amendments
8. Truth-in-Taxation notice
9. Board meetings minutes synopsis

### **6.4 Freedom of Information Acts Requests**

In order to avoiding incurring a financial hardship to the township from providing copies of public documents, the township shall charge individuals who request documents for each copy of a public document. The board shall annually review the cost of paper and copying to update the actual costs to be charged. In addition to paper and copying costs, the fee charged shall also recognize postage, mailing, facsimile and floppy disc costs. The charged shall equal the actual cost of responding to the specific Freedom of Information Act request.

The board also authorizes charging a fee for the cost of search, examination, review and deletion and separation of exempt from non-exempt materials when the failure to charge such a fee would result in an unreasonably high cost to the township. An unreasonably high cost shall exist when the estimated time to perform these tasks shall exceed 60 minutes, and the hourly rate shall be charged to the nearest minute.

In accordance with the Freedom of Information Act, the hourly rate charged shall be equal to the hourly salary of the lowest paid township employee, regardless of the salary of the employee who actually responds to the Freedom of Information Act request. The most economical means available shall be utilized in processing a request.

If the anticipated fee will exceed \$50, the requesting person shall provide a good faith deposit of one-half of the anticipated total fee.

The township supervisor shall be responsible for notifying any requesting person that a Freedom of Information Act request will be denied in whole or part, in accordance with the provisions of the Freedom of Information Act.

### **6.5 Incoming Mail**

The (person designated by clerk) shall receive all incoming mail, and shall open and date stamp the letter or cover sheet of all correspondence. Correspondence shall be sorted and distributed to the various township offices. Mail addressed to the township board shall be forwarded to the clerk, who shall provide a copy at the board meeting. Correspondence addressed to the board, but requiring action typically handled by a particular official, shall be immediately forwarded to the official as well.

### **6.6 Outgoing Mail**

The township board shall approve the design of all department letterhead stationery. Statements made on township stationery may be construed as the official position of Winfield Township, so all officials and employees should take every precaution that written statements are made with the scope of their authority. Township stationery shall only be used for official township business.

Department heads shall provide the township board, via the Supervisor with a copy of all correspondence that addresses a citizen complaint or when the content may result in a lawsuit to the township or in the board reviewing or implementing a township policy. Where a department head is unsure of the necessity to provide the board with a copy of correspondence, department heads should err on the side of caution.

All department correspondence should be considered as a public document, unless contents are specifically excluded from disclosure by state law. Copies of correspondence will be provided to any board member on request.

### **6.7 Confidential Information**

Officials and employees shall not release any information which would be a violation of a citizen's right to privacy to the media or to members of the general public.

## **7.0 Public Works**

### **7.1 Capital Improvement Plan**

#### 7.1(a) Responsibility

The township board shall be responsible for the development and updating of the township capital improvement plan. The capital improvement plan will be reviewed annually, with such review completed at least two months prior to initiating the development of the proposed township operating budget.

#### 7.1(b) Scope

The capital improvement plan shall address the medium and long-range needs of the township regarding buildings, lands, major equipment and infrastructure. The capital improvement plan shall prioritize such needs for the next five years beyond the current fiscal year.

#### 7.1(c) Content

Department heads and elected officials shall submit any suggested projects to be included in the capital improvement plan to the township board, who shall develop a capital improvement plan that includes the following information on each project:

1. Priority in order of need
2. Justification for priority ranking
3. Estimated year project will be commenced
4. Estimated year project will be completed
5. Total acquisition or construction cost
6. Method of financing acquisition or construction
7. Annual debt service from project
8. Estimated annual operating expenses after completion
9. Method of financing operating expenses

#### 7.1(d) Public Hearings

The township board shall hold a public hearing on the capital improvement plan prior to approval of the improvement plan by the township board. The township board may hold additional hearings on the capital improvement plan. Prior to beginning the development of the proposed budget for the ensuing fiscal year, the township board shall adopt the capital improvement plan as recommended or following any alterations it deems advisable. All parties involved in the development of the proposed budget shall address any implications of the capital improvement plan to the proposed budget.

## 7.2 Management of Public Works Projects

### 7.2(a) Responsibility

The township supervisor shall manage all public works conducted by the townships.

### 7.2 (b) Needs Assessment

The supervisor shall review the condition of existing township improvements to identify any necessary or desirable repairs or maintenance, identify the need for any new public improvements, and bring such matters to the attention of the board, if such needs are to be addressed in the current fiscal year, or to the township board for inclusion in the township capital improvement plan if proposed to be addressed in one or more future fiscal years.

### 7.2(c) Preliminary Study

On its own motion or by the presentation of a petition complying with state law, the board may authorize a preliminary study of a proposed public works project. The board shall retain one or more consultants as necessary to develop a feasibility study consisting of plans describing the improvement, the location of the improvement and an estimated cost of the improvement on a fixed or periodic basis, as appropriate. The feasibility study shall be received by the board and filed with the township clerk.

### 7.2(d) Financing

The township board shall determine the method by which the public improvement shall be financed. The township board resolves to tentatively establish a special assessment district, the township clerk shall give notice of the hearings as provided by law, and the board shall proceed with creating the special assessment district as provided by law.

If the township board determines that borrowing shall be necessary to finance the project, the supervisor and treasurer shall contact the Municipal Finance Division of the Michigan Department of Treasury to initiate approval. The township board shall appoint bond counsel to advise the township on all aspects of borrowing and to render a written opinion on the marketability of the bonds.

### 7.2(e) Requests for Proposals

The township board shall request proposals from firms interested in contacting to construct, alter, repair or maintain the public improvement. The township shall utilize its competitive bidding procedures in awarding contracts for public improvements.

The board shall require the posting of a performance bond by any contractor, as specified in the request of proposal, for all projects that anticipate a total contract cost exceeding \$500.00.

#### 7.2(f) Project Manager

The township supervisor shall act as liaison between the contractor, consultants and the board, or may delegate this responsibility in writing to a department head. The supervisor shall notify the board of any significant problems or issues that may arise in the project.

The supervisor is authorized to sign minor change orders that will result in a decrease in the project cost or that will increase the project cost not more than \$1000.00. The board will be notified of all change orders. All major change orders shall be approved by the board.

The supervisor shall require waivers of liens and sworn statements prior to authorizing the payment of any work performed. The waivers and sworn statements shall be filed by the township clerk.

The supervisor is authorized to act as the board's agent to resolve any problems or disputes arising from the project. The board shall be notified of all problems or disputes, as well as the nature of the resolution. The supervisor shall bring any major problems or disputes to the attention of the board prior to acting, if the time required to notify the board does not jeopardize the successful completion of the project.

#### 7.2(g) Closing Out a Project

Prior to closing out the project and issuing the contractor final payment, the board shall authorize final payment. At least 10% of the total contract cost shall be retained by the township until final approval is given by the board.

## **Appendix A**

### **Statutory Duties of Township Officers**

#### **I. Major Authorities of the Township Board and Officers**

##### **A. Legislative Body**

1. adopts ordinances
2. adopts budget
3. appoints most employees, boards, commissions
4. approves disbursements
5. authorizes contracts
6. adopts policies and administrative rules
7. fills mid-term vacancies
8. establishes compensation for appointed officials
9. may establish officer compensation
10. assumes powers of the electorate when annual meeting not held
11. buys, sells or conveys township property
12. adopts elected officials salary resolution prior to annual meeting (if held).

##### **B. Officers' Duties**

1. Supervisor
  - a. moderates meeting
  - b. votes on all matters
  - c. may call special meetings
2. Clerk
  - a. keeps minutes
  - b. publishes minutes of SEV exceeds 25 million
  - c. prepares fiscal reports (absent other procedures)
  - d. votes on all matters
  - e. sends out special meeting announcements to board
3. Treasurer
  - a. votes on all matters
4. Trustees
  - a. votes on all matters

##### **C. Board Administrative Responsibilities**

1. meets at least quarterly (monthly for charter township)
2. establishes meeting schedule
3. determines number and duties of constables
4. approves industrial tax exemptions
5. rezones property

6. recommends approval/denial of liquor licenses
7. appropriations to services to the aging
8. submits extra voted millages to the voters
9. creates special assessment districts
10. determines allocation board request
11. resolves to hold annual meeting
12. designates township fund depositories

**D. Limitations on Board**

1. federal and state law
2. lawful actions of the annual meeting
3. library board, park commissions
4. civil service commissions
5. salary compensation commissions
6. lawfully executed contracts

**II. Authority of the Electors at Annual Meeting (if held)**

- A. Alter or ratify salary resolution
- B. Authorize ballot question for two additional trustees
- C. Adopt rules for conducting annual meeting
- D. Supervisor moderates; clerk takes minutes
- E. Board members may vote
- F. All township electors may vote
- G. Annual meeting held only upon board resolution or ballot approval

**III. Supervisor's Duties**

- A. Moderates board and annual meetings
- B. Chief assessing officer-may assess if certified
- C. Non-voting secretary to board of review
- D. Delivers certificates to levy taxes to county clerk by Oct. 1
- E. Agent for the township
- F. Keeps records of the office
- G. May appoint a deputy
- H. Submits tax allocation board budget (where in effect)
- I. Calls special meetings
- J. Develops budget
- K. Appoints planning commission members, one member of police and fire civil service commission, economic development commission, officers' compensation commission, one-half of tenant affairs board members, all with township board approval.
- L. Appoints housing commission members
- M. Appoints historic site district committee, unless ordinance provides otherwise
- N. Charter township supervisors may have additional authority (if superintendent is not appointed).

**IV. Clerk's Duties**

- A. Custody of all records of the office
- B. Custody of all township records unless otherwise provided
- C. Maintains general ledger of accounts
- D. Prepares town orders to draw checks
- E. Prepares minutes for board, annual meetings
- F. Must appoint a deputy
- G. Maintains a book of oaths
- H. Posts surety bond
- I. Delivers notices of special meetings
- J. Publishes minutes if general law township SEV exceeds 25 million, and in all charter townships.
- K. Maintains voter registration file and conducts elections
- L. Maintains ordinance Book
- M. Prepares financial statement
- N. Delivers tax certificates to supervisor prior to Sept. 15

**V. Treasurer's Duties**

- A. Receives all receipts and issues checks
- B. Collects taxes on behalf of township and other tax-levying units
- C. Invests surplus funds in approved depositories
- D. Collects delinquent personal property and jeopardy assessments
- E. Collects mobile home specific tax
- F. Deposits township revenue
- G. Collects summer school taxes by contract with school district
- H. Must appoint a deputy
- I. Posts surety bond

**VI. Trustee's Duties**

- A. Township legislators
- B. Other duties assigned by board

## **Appendix B**

### **Public Notice Requirements**

#### **ALL TOWNSHIP MEETINGS:**

All public bodies must post a notice of the time, date and place of all regularly scheduled meetings within 10 days of the beginning of the township calendar or fiscal year.

Changes in regularly scheduled meetings must be posted within three days after the meeting at which the change is made.

Special meetings must be posted 18 hours prior to the meeting at a location that is publicly accessible for at least 18 hours prior.

Recessed meetings that are not reconvened within 36 hours must be posted in the same manner as a special meeting (MCLA 15.265).

#### **TOWNSHIP SPECIAL MEETINGS:**

In a general law township, the supervisor or a majority of the board may call a special meeting. The clerk shall give notice of the time and place to each board member, either in person or at the member's address. No business shall be transacted at a special meeting unless such business has been stated in the meeting notice, or unless all board members are present (MCLA 41.72a).

#### **ANNUAL MEETING:**

The meeting is posted in accordance with the notice requirements in the Open Meetings Act and Budget Hearing Act. The time, date and place of the meeting is posted within 10 days of the beginning of the calendar or fiscal year (MCLA 15.265)

#### **BOARD OF REVIEW:**

Notices of assessment increases are mailed to the taxpayer at least 10 days prior to the first meeting of the board of review (MCLA 211.24c). Notice of the date, time and place of the board of review is published in a generally circulated newspaper at least one week prior to the first meeting and shall appear in three successive issues. If no newspaper is available, then the notice is posted in five conspicuous places in the township (MCLA 211.29).

#### **BUDGET HEARING:**

In a general law township, notice of the budget hearing stating the time and place of the hearing and the place where a copy of the budget is available for public inspection must be printed in a newspaper of general circulation at least six days prior to the hearing (MCLA 141.412). A charter township must publish this notice at least seven days prior to the hearing (MCLA 42.26).

**ELECTIONS:**

Two notices of the days and hours the clerk will be available to receive registrations must be published in a newspaper. The first notice must be published no less than 10 days prior to the last day to receive registrations (MCLA 168.498).

Two notices of elections must be published in a newspaper. The first notice must be published no less than 10 days prior to the election. Statutory language for this notice is contained in MCLA 168.653a.

**MASTER PLAN ADOPTION:**

Public hearings on adoption or amendment to a master land use plan must be preceded by two notices published in a newspaper. The first notice must be given at least 30 days prior. The second notice must be no less than seven days prior to the hearing. The two notices must also be published at least two weeks apart (MCLA 125.329).

**ORDINANCE ADOPTION:**

All ordinances and ordinance amendments must be published in a newspaper within 30 days after adoption. The ordinance must be published in its entirety or may be published in a summary form. If a summary is used, each section shall be preceded by a catch line, and the notice shall indicate a township location where a true copy can be inspected or obtained (MCLA 41.184; MCLA 42.22)

Within one week after publication the ordinance shall be recorded in a book of ordinances, indicating how each board member voted and including a certificate stating the publication date(s) and name of newspaper where published (MCLA 41.185).

Charter townships have the option of publishing by posting copies of the ordinance in five locations within the township within seven days prior to publishing a notice containing a description of the ordinance in a newspaper (MCLA 42.8). Charter townships must also compile and publish township ordinances in looseleaf or booklet form at least once every 10 years (MCLA 42.20). A charter township may also adopt any state law, regulation or any official or unofficial recognized standard code as a township ordinance or ordinance amendment by publishing no less than 50 copies in book or booklet form and making it available to the public at a reasonable charge (MCLA 42.23).

**PROPERTY TAXES:**

The Truth-in-Taxation law requires a notice be published in a newspaper stating “Notice of Increase In Property Taxes” along with additional statutory language prior to holding a public hearing on levying the township’s full authorized millage rate. Without such a hearing, the township must roll back its millage rate to an amount that will result in no additional revenue yield from the current year assessment increases (MCLA 211.24e).

## **SENIOR CITIZEN APPROPRIATIONS:**

Notification of an appropriation to a public or private non-profit organization providing services to senior citizens must be published in a newspaper within 10 days following approval by the township board. The notice shall specify the terms of the appropriation (MCLA 400.574).

## **SPECIAL ASSESSMENTS:**

Regardless of the statute authorizing the special assessment district, all property owners must receive notice of all special assessment public hearings, sent by first class mail, at least 10 days prior to the hearing (MCLA 211.741).

Special assessment districts created pursuant to Public Act 188 of 1954 require two notices be published prior to a public hearing. The first notice must be published at least 10 days before the hearing. Railroads to be specially assessed must also be notified. Notices should indicate the date, time and location of the hearing, advise that plans and cost estimates are on file and available for public inspection and contain a description of the district (MCLA 41.72a).

Due to the passage of PA 64 of 1989, all notices for any public hearing held in the special assessment process must now also include a statement notifying the property owner of the right to appeal a special assessment levy to the Michigan Tax Tribunal. The notice must indicate that a property owner may appeal the assessment levy only if an appearance is made at the hearing at which the roll is confirmed. An appearance can be made in person or by mail and can be made by an agent for the property owner (MCLA211.741).

Within 30 days after the confirmation hearing, a notice must be mailed indicating the amount of the assessment and the right to appeal. While this state law as it currently stands is somewhat ambiguous, it is the Michigan Townships Association's opinion that this notice must be mailed only to those individuals who have preserved their right to appeal by protesting their assessment at the roll confirmation hearing (MCLA 211.746).

## **ZONING ORDINANCES:**

In addition to the above ordinance adoption procedures, a notice of a public hearing held by the planning commission/zoning board on a proposed zoning ordinance or amendment must be published twice in a newspaper. The first notice is published between 20 and 30 days prior to the hearing, and the second notice is published no more than eight days prior to the hearing. A utility or railroad that registers with the township must be given 20 days prior notice of the public hearing (MCLA 125.279).

If the township board holds additional hearings, notice shall be published in a newspaper between five and 15 days prior to the hearing (MCLA 125.281).

Within 15 days following adoption, a notice of adoption of the zoning ordinance or amendment must be published in a newspaper. Statutory language is included.