



The IMFOA Board welcomes you to the Iowa Municipal Finance Officers Association (IMFOA) Conference.

The IMFOA Conference is designed to have something for everyone—whether you are starting your new venture with your city, or as a seasoned expert. During the conference, you will learn to build on your own organization’s strengths and address your own organization’s opportunities for improvement.

You won’t want to miss the many opportunities to network and connect with conference attendees and set the stage for long-term IMFOA relationships. Take time during the breaks, and lunches to discuss, share, and debate new ideas.

Enjoy the conference experience, and please feel free at any time to reach out to a Board member. We will be wearing the “Board” ribbon on our name badge. Thanks for attending and being part of the IMFOA community; we look forward to supporting you in your journey to performance excellence!

Scanning – Your name badge is your “passport” to all sessions. We will announce at the conference when we will be scanning at the doors in between sessions, so make sure you head to the doors at that time.

Drink Tickets – You will receive 2 drink tickets within your name badge, to be used at the Thursday night vendor/social event. Enjoy! **Please rip up and toss in the trash, or give to another attendee, any tickets you don't plan to use.**

Resources

IMFOA Website – www.imfoa.com – Information on IMFOA Board, Certifications, ClerkNet and more.

ClerkNet – email forum designed to provide professional assistance to our membership by encouraging dialogue and advice with colleagues in other communities. (Only available to Benefited Members of IMFOA)

Mentoring Program – A program for skilled and experienced professionals to share their skills with those new to City Government, facilitated through the Iowa League of Cities. You will find this and a wealth of information for City Professionals on this website - <https://iowaleague.org/resource/clerk-mentor-program/>

Educational Training – Iowa State University Extension and Outreach facilitates the Municipal Professional Institute (MPI) and Municipal Professionals Academy (MPA) which offers continuing education training for city clerks, finance officers and others to provide in-depth training for clerks and municipal staff to get useful, up-to-date information that will assist them in their job performance. It also provides opportunities to meet clerks from across the state - make friends and business acquaintances, updates on new laws, programs and technology affecting Iowa municipal government and an opportunity for credits toward recertification for IMFOA and IIMC sponsored certifications. More info at <https://www.extension.iastate.edu/communities/oslgp/mppi-mpa>



The Iowa Municipal Finance Officers Association is an association of city clerks and municipal finance officers in Iowa. The purpose of IMFOA is to conduct regular instructional and informational meetings, as often as deemed necessary by the Board of Directors, for the purpose of educating municipal officers in the keeping of public records and for any other purpose deemed to be in the best interest of the public.

Current Board of Directors

Trish Gleason – President	Assistant City Clerk	Dubuque
Tricia Maiers – Vice President	City Clerk/Treasurer	Dyersville
Deb Wheatley Field – Secretary / Treasurer	Retired City Clerk	Atlantic
Brian Weuve	Finance Director	Pella
Melissa Simmons	City Clerk/Treasurer	Latimer
Shelby Hagan	City Clerk	Bondurant
Darryl Ten Pas	Finance Director	Sioux Center
Christina Eicher	City Clerk	Lisbon

Past Presidents

Beverly Conrad	City Clerk	Wayland
Erin Learn	City Clerk	Manchester
Karyl Bonjour	City Clerk	Webster City

Mark your calendars now & join us for future IMFOA Conferences:

- April 17 – 19, 2024
- October 16 – 18, 2024
- April 9 – 11, 2025 - week earlier to avoid Good Friday
- October 15 – 17, 2025
- April 15 – 17, 2026
- October 21 – 23, 2026

If you haven't browsed the IMFOA website, there are Helpful Links such as:

- Iowa DOT
- IPERS
- Iowa League of Cities
- IRS – Internal Revenue Service
- State of Iowa

You can also find your dashboard on the IMFOA website showing you all of the classes you have taken.

Don't hesitate to reach out if you have any questions or ideas for topics for the Board to consider for future conferences.

ClerkNet Do's and Don'ts

ClerkNet was implemented to provide professional assistance to our membership by encouraging dialogue and advice with colleagues in other communities. As such, it needs to be used in a professional manner. The following usage rules are provided by the IMFOA Executive Board, the sponsor of ClerkNet.

DO:

- share information on an issue in your community
- share documents of use to others
- ask questions when you need help with an issue
- always include your name, city, population, phone and fax numbers and email address
- share job openings
- share equipment for sale
- remember anything you say on the service could end up on the front page of the local newspaper

DON'T:

- thank someone over the service-do that personally
- share jokes or "save the whale" type messages
- share random rants
- share emails of a religious nature
- use backgrounds that obscure the text of the message
- forget your contact info to eliminate the "me too" messages

Thanks for your cooperation. Violators of the ClerkNet policies will be suspended and/or removed from the service.

ClerkNet Violation Policy

ClerkNet is a professional resource for IMFOA members, and as such, the IMFOA Board of Directors has determined that this Policy be implemented to preserve the integrity of the listserv.

This policy contains four levels of penalties for violation of ClerkNet regulations. It is hereby noted that—although in most cases a violator would be moved from level one through level four—a level (or levels) may be skipped at the discretion of the IMFOA Board of Directors dependent on the severity and/or frequency of the offense(s).

The IMFOA Board of Directors will review complaints on a case-by-case basis to determine if a violation has occurred and if any action is required. A consensus (majority vote) of the Board of Director members will be needed to take any action with regards to a violation. Said vote(s) can be cast at a meeting of the Board or by electronic means (e-mail) to the IMFOA Board President.

Level 1

The user will be sent one, or more, written (e-mail) warnings regarding the nature of their violation.

Level 2

The violator will be suspended from ClerkNet for a period of 30 days.

Level 3

The violator will be suspended from ClerkNet for a period of 90 days.

Level 4

The violator will be suspended permanently from ClerkNet.

All warnings and penalties will come from a member of the IMFOA Board of Directors and each will include a copy of this policy so the violator is aware of possible penalties for future violations. Since the IMFOA membership is a City membership—not an individual membership—all ClerkNet users within the violator's City will be subject to the suspension period.

The Board decisions on Level 1, Level 2 and Level 3 penalties will be final. Level 4 penalties can be appealed in writing to the Board of Director's. Any appeal will need to state a reason for the appeal and whether or not the violator would be eligible for ClerkNet usage if it were to be reinstated.

ClerkNet Usage Protocol

ClerkNet is an excellent reference that can benefit everyone. However, there are regulations for appropriate ClerkNet usage. Please remember to include your city name and population, as well as your email address, fax and phone number when sending or replying to messages. That will allow people to respond to you personally if they wish. Also, in order to help users determine if a message applies to their city, be sure to include a subject line that indicates the body of the message.

When you receive an email from ClerkNet, hitting reply sends your message to the entire network. Be careful! If you want to send a private message, you'll need to address the email to the individual.

Try to avoid the use of "same here" or "me too" responses. Messages don't always show up on user's computers in the same order they were submitted, so they may not have received the original question yet. Please try to avoid using the system for thank you messages.

Try to limit or avoid the use of backgrounds in your messages – it makes them more difficult to read.

What to use ClerkNet for: ClerkNet is a tool for fast research; sharing documents; requesting samples of ordinance, policies, etc., or asking, "What are you doing about...?"

What *not* to use ClerkNet for: Items that do not pertain to municipal government, including jokes, random rants, emails of a religious nature, and anything you don't want the newspaper to publish.

Things to keep in mind: Your own email usage policies. Email has been deemed a public record, so anything you submit has the potential to end up in the hands of a newspaper or other individual. Please remember that ClerkNet is not a chat room. League staffers are monitoring the network, but do not act unless specifically asked. ClerkNet is scanned for viruses, but the League cannot promise to catch everything.

CLERKNET IS A PROFESSIONAL REFERENCE. USE OF CLERKNET FOR ANYTHING NOT DIRECTLY RELATED TO MUNICIPAL GOVERNMENT ISSUES WILL NOT BE TOLERATED. USE OF CLERKNET FOR OTHER MATTERS MAY RESULT IN TERMINATION OF CLERKNET PRIVILEGES.



Our Mission

The Iowa League of Cities serves as the unified voice of cities, providing advocacy, training and guidance to strengthen Iowa's communities.

We recognize the need for strong leadership in our missions and in each of our values. These values represent the shared principles that guide all of our efforts and decisions.

Who we are

The Iowa League of Cities serves as the unified voice of cities, providing advocacy, training and guidance to strengthen Iowa's communities.

More than 850 of the cities in Iowa, both large and small, are members. The League is governed by members through an Executive Board of officials, balanced by geographic region and city size.

Where we come from

The Iowa League of Cities has been serving as a key resource for municipalities since 1898, when a small group of city officials gathered in Marshalltown to exchange ideas on how to strengthen and improve local government in Iowa.

Those officials had a vision. They recognized that by joining together as one voice, all cities would benefit – then and in the future.

What we do

Through membership services, research, publications, training and other collaborations, the League provides guidance and serves as the resource for member cities.

We lead a grass-roots advocacy effort for local government by promoting effective public policy and Home Rule among members as well as state and federal law makers.

For more information on the Iowa League of Cities visit lowaleague.org

2024

Iowa Municipal Policy Leaders' Handbook

***A Guide for Iowa
Mayors and
Council Members***

<https://iowaleague.org/wp-content/uploads/2024MunicipalPolicyHandbook.pdf>

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Iowa League of Cities

Record Retention

Manual for Iowa Cities

Produced by the Iowa League of Cities, State Historical Society of Iowa's State Archives and Records Bureau and Iowa Municipal Finance Officers Association.

<https://iowaleague.org/wp-content/uploads/2012/RecordRetentionManual.pdf>

This records manual is intended to assist officials in the management of records created and received in the conduct of city business. Ideally, records should facilitate the efficient, economical operation of municipal government, not impede it. This manual suggests methods of controlling records that can help convert a potential liability into an asset.

One method of controlling records is to establish a timetable, or schedule, for destroying records that are no longer needed. The largest section of this manual consists of such schedules for records most commonly found in cities in Iowa. These schedules list categories of records, or series, and indicate minimum periods of time city officials need to keep them for administrative, legal, fiscal or historical purposes. In developing these schedules, no attempt was made to identify all of the records in any one city or to list all records that could possibly exist in all cities. Rather, functional categories common to the majority of Iowa municipalities were identified. The recommended retention periods take into account requirements of the *Code of Iowa*, the Iowa Administrative Code and federal law. In cases where no law exists concerning appropriate retention periods, state and city officials who work with records were consulted.

Record series retention and disposition schedules are only one component of an effective records management program. Inactive storage, historical appraisal, municipal records management ordinances, filing systems, electronic methods of recording and retrieving data, and disaster planning are some other components of record management of importance for municipalities. While these topics are important, they have not been included. This manual is meant to be a beginning from which a complete records program can develop.

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Open Meetings

Guidance on the Iowa Open Meetings Law, *Code of Iowa* Chapter 21 | 2023



Find additional information on Open Records online at www.iowaleague.org.

500 SW 7th Street,
Suite 101
Des Moines, IA 50309

Phone:
(515) 244-7282

Email:
mbrsvcs@iowaleague.org

www.iowaleague.org



The purpose of this publication is to provide general guidance on the Iowa Open Meetings Law, *Code of Iowa* Chapter 21. This law requires meetings of governmental bodies to be open to the public. Cities often have questions about the applicability of this law to day-to-day city business. The information contained here is designed to be general in nature and does not constitute legal advice. The city should contact its attorney if there are specific legal questions about open meeting requirements. The Iowa Open Meetings Law favors openness, so situations where the applicability of the law is unclear should be resolved on the side of openness.

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<https://iowaleague.org/wp-content/uploads/2023OpenMeetings.pdf>

Open Records

Guidance on the Iowa Open Records Law, *Code of Iowa* Chapter 22 | 2023



Find additional information on Open Records online at www.iowaleague.org.

500 SW 7th Street,
Suite 101
Des Moines, IA 50309

Phone:
(515) 244-7282

Email:
mbrsvcs@iowaleague.org

www.iowaleague.org



The purpose of this publication is to provide general guidance on the Iowa Open Records Law, *Code of Iowa* Chapter 22. This law generally provides that every person has the right to examine and copy public records and to disseminate these records or the information contained therein. Cities often have questions about the applicability of this law to day-to-day city business. The information contained in this report is designed to be general in nature and does not constitute legal advice. If there are specific legal questions about open records requirements, the city should contact its city attorney. The Iowa Open Records Law favors accessibility to public records, so situations where the applicability of the law is unclear should be resolved on the side of openness.

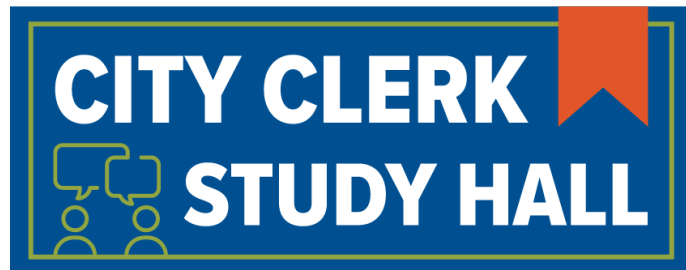
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<https://iowaleague.org/wp-content/uploads/2023OpenRecords.pdf>

We recently learned that our members and business partners may have received an email notifying them that the hotel block for our Annual Conference & Exhibit is open. This is NOT the League's hotel room block. The League's Annual Conference & Exhibit room block information will be sent AFTER you register for the conference and the link will be sent from League staff.

The city clerk position is essential to the operations of any city because of the numerous and varied duties they fulfill, such as publishing meeting minutes, completing budget forms, managing city finances, responding to citizen needs and a host of other items. Recognizing the important job city clerks perform, the League is offering a new webinar series to support new or less experienced clerks, "City Clerk Study Hall". These webinars aim to equip you with the knowledge and skills necessary to excel in your role!



The upcoming webinars will provide a platform for questions and discussion with a group of experienced city clerks.

Wednesday, June 12 | 10-11 a.m.

Wednesday, September 11 | 10-11 a.m.

Wednesday, December 11 | 10-11 a.m.

View webinar from March 13 comprehensive overview of core city clerk duties.

[City Clerk Duties and Responsibilities Webinar](#)

Register for City Clerk Study Hall on June 12:

Name

First

Last

<https://iowaleague.org/resources/administration/city-clerk-study-hall/>

Iowa League Mentoring Program

The Iowa League of Cities Clerk Mentor Program matches experienced city clerks (mentors) with new or less experienced clerks (mentees) who feel they need a little extra guidance. The League’s clerk mentors are willing to share their skills, knowledge, and experiences to help set up mentees for success in the city clerk profession.

Depending on the assistance needed, mentoring can occur over the phone, via email, and when necessary, in person.

Northwest	Northeast	Southeast	Central	South Central	Southwest
Algona: Barbara A. Smith	Charles City: Trudy O’Donnell	DeWitt: Deanna Rekemeyer	Bondurant: Shelby Hagan	Jane Underwood	Atlantic: Barb Barrick
Anthon: Anita Brandt	Dubuque: Trish Gleason	Durant: Deana Cavin	Boone: Ondrea Elmquist	Humeston: Courtney Peasley	Carroll: Laura Schaefer
Churdan: Nancy Janssen	Dyersville: Tricia Maiers	Fairfax: Cynthia K. Stimson	Colfax: Nancy Earles		Harlan: Jane Smith
Forest City: Daisy Huffman	Earlville: Linda Gaul	Hiawatha: Cindy Kudrna			Manning: Dawn Meyer
Lake Mills: Diane Price	Gilbertville: Teresa Adamson	Marion: Kim Downs			Oakland: Marissa Lockwood
Rolfe: Angela Montag	La Porte City: Jane Whittlesey	Monticello: Sally Hinrichsen			
	Latimer: Melissa Simmons	Wayland: Beverly Conrad			
	Walker: Connie Helms				

<https://iowaleague.org/resource/clerk-mentor-program/>

2024 City Calendar



JANUARY

Jan 1	New Year's Holiday, League office closed
Jan 2	Oath of Office for newly elected officials must be taken by noon <ul style="list-style-type: none"><i>Oath of Office - The oath may be administered at any time after the election results are certified. Oath is not required to be administered at a council meeting.</i>
Jan 15	Martin Luther King Day, League office closed
Jan 31	W-2 forms due to employees and filed with federal/state governments 1099 forms due to contractors and filed with federal/state governments FICA (Form 941) and unemployment quarterly payments due (for 4th quarter of 2023)

FEBRUARY

Feb 1	OSHA Log & Summary of Work-Related Injuries and Illnesses to be posted <ul style="list-style-type: none"><i>OSHA Log - A copy of the log must be posted in the place or places where notices to employees are customarily posted. This copy must be posted no later than February 1 and must remain in place until April 30. Even if there were no injuries or illnesses during the year, zeros must be entered in the total line and the form must be posted.</i>
Feb 7-9	Municipal Professionals Institute - Virtual
Feb 19	President's Day

MARCH

Mar 11-13	National League of Cities Congressional City Conference, Washington, D.C.
Mar 27-29	IMMI Conference, Iowa City
Mar 31	Audit or annual examination for the previous fiscal year is due <ul style="list-style-type: none"><i>Cities over 2,000 in population must complete an audit every year. Cities 2,000 and under with \$1 million or more in budgeted expenditures must complete an annual financial examination. Full details are available at the Auditor of State's Office.</i> Periodic examination fee due to State Auditor <ul style="list-style-type: none"><i>Cities 2,000 and under in population with less than \$1 million in budgeted expenditures must pay a periodic financial examination fee each year. The fee is based on a city's budgeted expenditures. Each city in the periodic examination pool will be examined at least once every eight years. Full details are available at the Auditor of State's Office.</i>

*other deadlines to note on page 3

2024 City Calendar



APRIL

Apr 17-19	Iowa Municipal Finance Officers Association Spring Conference, Des Moines
Apr 24-25	Iowa Municipalities Workers' Compensation Association (IMWCA) University
Apr 30	Perpetual Care Cemetery Annual Report due to Insurance Division FICA (Form 941) and unemployment quarterly payments due Budget must be certified to county auditor/filed with Department of Management <ul style="list-style-type: none"><i>The original and one copy of the budget documents are required to be certified to the county auditor. The budget must be submitted electronically to the Department of Management. Full details on the budget approval process can be found on the League website.</i>

MAY

May 19-22	International Institute of Municipal Clerks Annual Conference, Calgary, Alberta, Canada
May 27	Memorial Day, League office closed
May 31	Budget Amendments must be certified to county auditor <ul style="list-style-type: none"><i>The original and one copy of any amendment must be certified to the county auditor. The amendment is required to be approved following a public hearing. The notice of public hearing must be published not less than 10 days and no more than 20 days before the hearing. If the city has a population of 200 or less, notice can be made by posting in three public places in the city. Proof of publication must be filed with the county auditor.</i>

JUNE

Jun 1	Debt principal and interest payments due <ul style="list-style-type: none"><i>Typically, general obligation debt principal and interest payments are due June 1 and interest payments are due December 1. There are certain exceptions, especially when dealing with a local lender. The finance officer should confirm these payment dates with the appropriate agency.</i>
Jun 9-12	Government Finance Officers Association Annual Conference, Orlando, FL
Jun 19	Juneteenth Holiday, League office closed
Jun 19-21	Municipal Professionals Academy
Jun 24-27	Municipal Professionals Institute
Jun 30	End of Fiscal Year 2024 Cigarette permits expire

*other deadlines to note on page 3

2024 City Calendar



JULY

Jul 1 Fiscal Year 2025 begins
Certification of necessity to retain Physical Plant and Equipment Levy (PPEL) to cover existing debt obligations in urban renewal districts due to school district
• *Cities should consult with their county auditor in addition to the school district prior to certification.*

Consumer Confidence Reports due

Jul 4 Independence Day Observed, League office closed

Jul 10-12 Iowa City/County Management Association Summer Conference

Jul 31 (Form 941) and unemployment quarterly payments due

OTHER DEADLINES

- IPERS payments due the 15th of each month
- Appointments to Boards & Commissions
- Federal and State Fuel Tax Refunds
- Codification of Ordinances
 - *See Code of Iowa Section 380.8*
- Annual Publication of Employee Salaries
 - *Publication of Salaries - The Iowa Attorney General has issued an opinion that the monthly salaries of each employee need not be published with the council minutes if the gross yearly salaries are otherwise published. See Op. Atty. Gen. (Sweeny), April 12, 1978.*
- Iowa Withholding Due Date Calendars
- Iowa Sales Tax Due Date Calendars

AUGUST

Aug 31 Outstanding Obligation Disclosure Report must be filed online with State Treasurer's Office

Aug 31 Housing and Urban Development (Section 8 housing) Annual Report due to Department of Housing and Urban Development
• *Section 8 Management Assessment Program (SEMAP) Report - Due sixty (60) days after the end of the housing authority's fiscal year: 24CFR985.101.*

SEPTEMBER

Sep 2 Labor Day, League office closed

Sep 18-20 League Annual & Exhibit Conference, Sioux City

Sep 21-25 International City/County Management Association (ICMA) Conference, Pittsburgh, PA

2024 City Calendar



OCTOBER

Oct 2-4 Municipal Professionals Academy - Virtual

Oct 16-18 Iowa Municipal Finance Officers Association Fall Conference, Des Moines

Oct 30 (Form 941) and unemployment quarterly payments due

NOVEMBER

Nov 1 **Unclaimed Property report due to State Treasurer**

- Unclaimed Property Report - Cities are required to report unclaimed property annually to the state of Iowa by November 1. This may include unclaimed deposits or uncashed checks. Negative reports (no unclaimed property) are no longer required. The report is required to be submitted electronically using software available on the Treasurer of State website at: www.greatiowatreasurehunt.gov.

Receive Railroad Crossing Annual Letter from Iowa DOT

Nov 13-16 National League of Cities City Summit, Tampa, FL

Nov 28-29 Thanksgiving Holiday, League office closed

DECEMBER

Dec 1 **Annual City Financial Report due to Auditor of State**

- Annual Financial Report (AFR) - Code of Iowa Section 384.22 requires all cities in Iowa to electronically file an AFR no later than December 1 of each year. Proof of publication must be filed with the state auditor. If the city has a population of 200 or less, notice can be made by posting in three public places in the city. There is no public hearing requirement.

Tax Increment Financing debt requirements must be certified to county auditor

Annual Urban Renewal Report

- Cities are required to file an electronic report with the Department of Management no later than December 1 of each year. The form can be found on the Department of Management's website at <https://dom.iowa.gov/cities>. City council must approve the form prior to submittal.

Debt interest payments due

- Typically, general obligation debt principal and interest payments are due June 1 and interest payments are due December 1. There are certain exceptions, especially when dealing with a local lender. The finance officer should confirm these payment dates with the appropriate agency.

Iowa DOT Street Finance Report due online to Office of Local Systems

Dec 25 Christmas Holiday Observed, League office closed

<https://iowaleague.org/wp-content/uploads/2024ClerksCalendar.pdf>



The Institute is broken into three educational sessions throughout the year:

February 7–9, 2024 (winter session)

- Virtual Classes on TalentLMS

June 24–27, 2024 (summer session)

- In-person classes held at Gateway in Ames

October 2–4, 2024 (fall session)

- Virtual Classes on TalentLMS

Each session offers different courses. No course is repeated during the year. Pricing is based on individual schedules. Registration will open for each session separately.

Questions?

Contact: Iowa State University Extension and Outreach Community and Economic Development
2321 North Loop Drive, Suite 121
Ames, IA 50010

sshonroc@iastate.edu
aveldie@iastate.edu

This is the 49th year of the Institute, still one of the largest in the nation, with more than 250 municipal professionals attending each year.

Sponsored by Iowa State University Extension and Outreach Community and Economic Development and the Iowa Municipal Finance Officers Association in cooperation of the Iowa League of Cities.

WINTER: FEBRUARY 7–9, 2024

Register for this VIRTUAL event by February 1, 2024

Wednesday, February 7

- CL301:** Parliamentary Procedures
9 a.m. – 12 p.m. (3 hours)
- FX290:** E-Reporting & Communications for the Clerk's Office
8 a.m. – 12:15 p.m. (4 hours)
- FX210:** Managing Risk and Purchasing Insurance
1 – 3 p.m. (2 hours)

Thursday, February 8

- BA155:** Principles of Effective Management
8 a.m. – 12:15 p.m. (4 hours)
- CL330:** Office Administration/P&Z/Nuisance
8 a.m. – 3 p.m. (6 hours)
- FX201:** Administrative Law and Procedures
1 – 3 p.m. (2 hours)

Friday, February 9

- FX230:** The Fine Art of Negotiations
8 a.m. – 12:15 p.m. (4 hours)
- CL329:** Clerks Role in Elections
8 – 10 a.m. (2 hours)
- BA140:** Ethics of Public Officials
10:15 a.m. – 12:15 p.m. (2 hours)

SUMMER: JUNE 24–27, 2024

Register for this IN-PERSON event by June 14, 2024

Monday, June 24

- BA101:** Elements of a City Financial System
8 a.m. – 5:15 p.m. (8 hours)
- CL325:** Iowa Open Meetings & Open Records
8 a.m. – 12:15 p.m. (4 hours)
- BA145:** Working with Public Officials
1 – 5:15 p.m. (4 hours)

Tuesday, June 25

- BA125:** Written Communication
8 a.m. – 12:15 p.m. (4 hours)
- BA130:** Understanding Legal Terms
8 a.m. – 3 p.m. (6 hours)
- FN401:** Budgeting for Iowa Cities
1 – 5:15 p.m. (4 hours)
- BA120-1:** Planning Difficult Discussions
3:15 – 5:15 p.m. (2 hours of an 8 hour class)

Wednesday, June 26

- BA150:** Group Dynamics & Team Building
8 a.m. – 5:15 p.m. (8 hours)
- FN110:** General Ledger Accounting
8 a.m. – 5:15 p.m. (8 hours)

Thursday, June 27

- BA120-2:** Conducting Difficult Discussions
8 a.m. – 5:15 p.m. (6 hours of 8 hour class)
- FX250:** Best Practices in City Government
1 – 4:15 p.m. (3 hours, must be taken with BA120)
- FN415:** Accounting, Auditing and Other Fiscal Responsibilities
8 a.m. – 12:15 p.m. (4 hours)
- BA110:** Basics of a Personnel System
1 – 5:15 p.m. (4 hours)

FALL: OCTOBER 2–4, 2024

Register for this VIRTUAL event by September 27, 2024

Wednesday, October 2

- FX240:** Coping with Controversy
8 a.m. – 12:15 p.m. (4 hours)
- CL310:** Legal Aspects of Minutes
8 a.m. – 3 p.m. (6 hours)
- FN402:** Capital Planning
1 – 3 p.m. (2 hours)

Thursday, October 3

- BA149:** Working with Citizens
8 a.m. – 12:15 p.m. (4 hours)
- FN409:** Public Funds Investing
9 a.m. – 12:15 p.m. (3 hours)
- CL315:** Writing Resolutions & Ordinances
1 – 3 p.m. (2 hours)
- FX220:** Intergovernmental Relations
1 – 3 p.m. (2 hours)

Friday, October 4

- FN406:** Financing Options and Economic Development
8 a.m. – 12:15 p.m. (4 hours)
- CL320:** Records Retention Practices
8 – 10 a.m. (2 hours)

Course Key

BA - Basic Courses: 50 credits required | FX - Flex Courses: 25 credits required
CL - CLERK Courses: 25 credits required | FN - Finance Officer Courses: 25 credits required



Winter & Fall Session Information:

The virtual sessions of Institute will be held in a live and interactive format. Courses will not be recorded as webinars that you can watch when available, you will be required to be online and interacting to receive credit for certification. Instructors will have random polls within the sessions or you may be called on at random. Be sure to check the times of your courses as course links will close 15 minutes after classes start.

All virtual courses, Zoom sessions, class materials and testing will be housed on TalentLMS. We will provide a unique link for each session (winter, summer and fall) as well as a new login for each session. To stay updated keep checking our website at: extension.iastate.edu/communities/oslgp/mpi-mpa.

Technology Requirements

Virtual courses will require a laptop or desktop computer in order to participate. Cameras or a video option will be required to be on the entire time to receive credit for the course. Technology issues will need to be addressed before the start of the virtual sessions. Opportunities to test your system will be available.

Fall, summer, and winter sessions will utilize TalentLMS to store course documents, instructor presentations, and test links. Each session will require a separate registration process to enroll and will produce a new login within TalentLMS.

Summer Session Information

Housing and Directions

Gateway Hotel and Conference Center
2100 Green Hills Drive
Ames, IA 50014

Make your room reservations directly with Gateway at 1-800-FOR-AMES or (515) 292-8600 by Monday, May 27.

Please identify yourself as a Municipal Professionals Institute attendee and request the MPI room rate. Room rates do not include tax, which is 12%. For special accommodations please contact the hotel.

**Registration fee does not include housing. You need to make your own hotel reservations by Monday, May 27.*

Meals

Monday, June 24, following the morning session, a lunch will be held at Gateway. Costs are included in your registration fees.

Gateway has a restaurant on site. Ames has many fine restaurants within easy driving distance of the Gateway and a list and map will be provided to you at registration. Fast food is recommended during the daily lunch breaks.

Registration

Registration fees are based on the number of classes that you decide to take. Cost is \$16/credit hour. Fees must be paid before the session begins, with refunds guaranteed on registrations canceled two weeks prior to training. A \$50 fee will be charged for all refunds after that date. Additional fees may be incurred for day of cancellations, changes, or nonattendance. Registration is available online at extension.iastate.edu/communities/oslgp/mpi-mpa. Payments can be made online via credit card after registering. All registrations will receive an email confirmation and if you choose to pay by check, you will need to send a copy of this confirmation.

Scholarships and Shirt Order

The Institute & IMFOA award scholarships each year to assist with the cost of the Institute. Scholarship information and application materials can be found at <https://www.extension.iastate.edu/communities/municipal-professionals-institute-mpi> or by contacting Sara Shonrock at sshonroc@iastate.edu. The application deadline is April 5, 2024.

Institute awarded scholarships are funded through the sale of sweatshirts which can be purchased during the summer session registration. Only advanced purchase of sweatshirts is available, they are not available for purchase during the Institute. The 2024 Institute is offering a sage blue hoodie with a left chest logo in orange for \$32 (\$34 for sizes XXL-XXXXL).

Benefits of the Institute

- Opportunities for interaction with speakers, faculty and staff from universities and individuals who are involved in municipal administration.
- Opportunities to collaborate with other municipal professionals from across the state - make friends and business acquaintances.
- Updates on new laws, programs and technology affecting Iowa municipal government.

Certification

In addition to providing municipal professionals with valuable information to assist in the performance of their duties, the successful completion of the entire Institute fulfills most of the educational requirements for certification by the International Institute of Municipal Clerks (IIMC), and the Iowa Certification of Municipal Professionals program.

Full participation and attendance is required to receive credit for certification. In-person classes are held at the Gateway Center in Ames and final class schedules with locations will be provided in June. All classes will use TalentLMS to house course documents, instructor presentations, Zoom links for online classes, and links for all testing. A course may be canceled if there is insufficient registration. Participants will be contacted in advance if this occurs. For questions on any courses offered, please contact Sara Shonrock at sshonroc@iastate.edu (515-290-1811).

Register Online at

extension.iastate.edu/communities/municipal-professionals-institute-mpi

IIMC is an international association of clerks dedicated to advancing the professionalism required to be a city clerk. Certification by IIMC is a recognition of the individual clerk's involvement in professional development activities. By completing the appropriate courses offered by the Iowa Municipal Professionals Institute, clerks receive 60 points toward certification. This constitutes one-half of the 120 points needed for certification with the remaining points gained through experience and attendance at professional meetings.

The Certification for Municipal Professionals is an Iowa based program sponsored by the Iowa Municipal Finance Officers Association (IMFOA). It provides individuals with the opportunity to be certified in any or all of the four certification categories.

Those categories are:

- Certified Municipal Clerk
- Certified Municipal Finance Officer
- Clerk Associate
- Finance Associate

IOWA STATE UNIVERSITY™

Extension and Outreach

Community and Economic Development

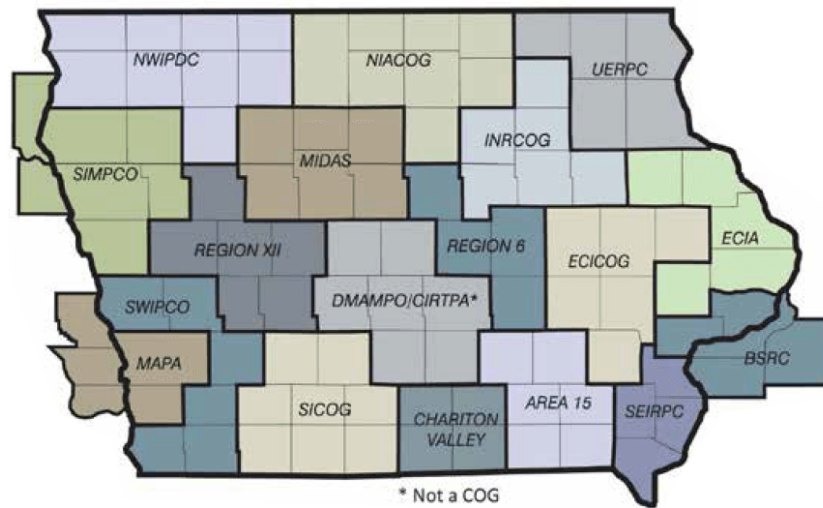
This institution is an equal opportunity provider. For the full non-discrimination statement or accommodation inquiries, go to www.extension.iastate.edu/diversity/ext.

Testing

IIMC requires each state to test participants in the major subjects offered through recognized training. The Iowa Municipal Professionals Institute (MPI) complies with this requirement by testing the major subjects offered in each of the courses which comprise the credits needed for IIMC certification. In addition, all "Basic" courses under the Iowa Certification for Municipal Professionals program require testing. Testing is conducted in a way that is non-threatening. Tests emphasize an understanding of how the material presented can be applied to the work done by municipal professionals. The tests are primarily short answer with focus on identifying terms and longer answer to address application. Participants are allowed to use notes and materials from the courses to assist in answering. Summer session participants will have access to technology as well as time set aside to complete tests during the week. Per IMFOA guidelines, all tests will be required to be completed within a specified time limit after the course has ended in order to receive certification credit.



Find your Council of Governments (COG)



WHAT IS A COG?

Created more than 45 years ago by visionary public leaders, Iowa's Councils of Governments (COGs) provide professional planning, programming, and technical assistance to Iowa's cities, counties, businesses, community organizations and Iowans of all ages.

COGs are indigenous organizations formed by counties, cities and towns to serve local governments and their regional citizenry. Their governing boards are made up of local elected officials, business and education leaders, economic development professionals, and individual citizens.

COGs provide regional planning and technical assistance to local governments and the communities in their regions by:

- Providing individualized assistance to cities, counties, businesses, community organizations and community members (such as a local comprehensive plan, loans to local businesses, grant-writing assistance, and housing and workforce programs)
- Providing planning services across multiple jurisdictions (such as a regional comprehensive solid waste management plan or long-range transportation plan); and
- Providing a forum that combines the elements of transportation planning, housing development, solid waste planning, and use planning, workforce development, and economic development into a comprehensive approach to regional growth and development.

To ensure the vitality and growth of their regions, COGs actively pursue funding opportunities from a variety of local, state, and federal resources. They provide expertise to cities and counties in securing competitive state and federal grants. As Regional Planning Affiliations, COGs plan for and program the distribution of federal transportation funds within their regions, including highways, transit, trails, and other enhancement programs. Most COGs also have established and administer regional revolving loan funds targeting housing and economic development.

For more than 30 years, COGs have been growing Iowa's communities, businesses, leaders, regions, and future.

Area 15 Regional Planning Commission

224 East 2nd St., PO Box 1110
Ottumwa, IA 52501
Phone (641) 684-6551
Counties | Davis, Jefferson, Keokuk, Lucas, Mahaska,
Monroe, Van Buren, Wapello, Wayne
www.area15rpc.com

Chariton Valley Planning & Development

308 N. 12th St.
Centerville, IA 52544
Phone (641) 437-4359
Counties | Appanoose, Lucas, Monroe, Wayne
www.charitonvalleyplanning.com

Iowa Northland Regional Council of Governments

Governments
229 E. Park Ave.
Waterloo, IA 50703
Phone (319) 235-0311
Counties | Black Hawk, Bremer, Buchanan, Butler,
Chickasaw, Grundy
www.inrcog.org

North Iowa Area Council of Governments

525 Sixth St., SW
Mason City, IA 50401
Phone (641) 423-0491
Counties | Cerro Gordo, Floyd, Franklin, Hancock,
Kossuth, Mitchell, Winnebago, Worth
www.niacog.org

Region XII Council of Governments

1009 East Anthony St., PO Box 768
Carroll, IA 51401
Phone (712) 792-9914
Counties | Audubon, Carroll, Crawford, Greene, Guthrie,
Sac, Dallas
www.region12cog.org

Southern Iowa Council of Governments

101 East Montgomery St.
Creston, IA 50801-0102
Phone (641) 782-8491
Counties | Adams, Clarke, Decatur, Madison, Ringgold,
Taylor, Union
www.sicog.com

Bi-State Regional Commission

1504 Third Ave., PO Box 3368
Rock Island, IL 61204-3368
Phone (309) 793-6300
Counties | Henry, Mercer (IL), Muscatine, Rock Island
(IL), Scott
www.bistateonline.org

East Central Intergovernmental Association

7600 Commerce Park
Dubuque, IA 52002
Phone (563) 556-4166
Counties | Cedar, Clinton, Delaware, Dubuque, Jackson
www.ecia.org

Metropolitan Area Planning Agency

2222 Cuming St.
Omaha, NE 68012
Phone (402) 444-6866
Counties | Douglas (NE), Mills, Pottawattamie, Sarpy
(NE), Washington
www.mapacog.org

**Northwest Iowa Planning & Development
Commission**

217 W. Fifth St., PO Box 1493
Spencer, IA 51301
Phone (712) 262-7225
Counties | Buena Vista, Clay, Dickinson, Emmet, Lyon,
O'Brien, Osceola, Palo Alto, Sioux
www.nwipdc.org

Siouxland Interstate Metropolitan Planning Council

1122 Pierce St.
Sioux City, IA 51105
Phone (712) 279-6286
Counties | Cherokee, Dakota, Dixon, Ida, Monona,
Plymouth, Woodbury
www.simpco.org

Southwest Iowa Planning Council

1501 SW Seventh St.
Atlantic, IA 50022
Phone (712) 243-4196
Counties | Cass, Fremont, Harrison, Mills, Montgomery,
Page, Pottawattamie, Shelby
www.swipco.org

**Central Iowa Regional Transportation Planning
Alliance***

420 Watson Powell Jr. Parkway, Suite 200
Des Moines, Iowa 50309
Phone (515) 334-0075
Counties | Boone, Dallas, Jasper, Madison, Marion,
Story, Polk, Warren
dmampo.org/about/

East Central Iowa Council of Governments

700 16th St., NE Suite 301
Cedar Rapids, IA 52402
Phone (319) 365-9941
Counties | Benton, Iowa, Johnson, Jones, Linn,
Washington
www.ecicog.org

MIDAS Council of Governments

602 First Ave. South
Fort Dodge, IA 50501
Phone (515) 576-7183
Counties | Calhoun, Hamilton, Humboldt, Pocahontas,
Webster, Wright
www.midascog.net

Region 6 Resource Partners

903 E. Main St., Suite A
Marshalltown, IA 50158
Phone (641) 752-0717
Counties | Hardin, Marshall, Poweshiek, Tama
www.region6resources.org

Southeast Iowa Regional Planning Commission

211 North Gear Ave., Suite 100
West Burlington, IA 52655
Phone (319) 753-5107
Counties | Des Moines, Henry, Lee, Louisa
www.seirpc.com

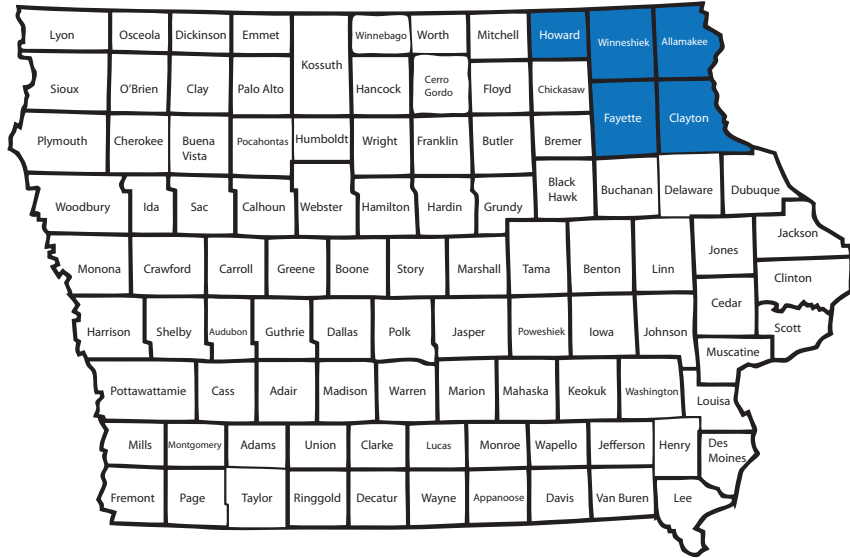
Upper Explorerland Regional Planning Commission

134 West Greene St., PO Box 219
Postville, IA 52162
Phone (563) 864-7551
and
325 Washington St.
Decorah, IA 52101
Phone (563) 382-6171
Counties | Allamakee, Clayton, Fayette, Howard,
Winneshiek
www.uerpc.org

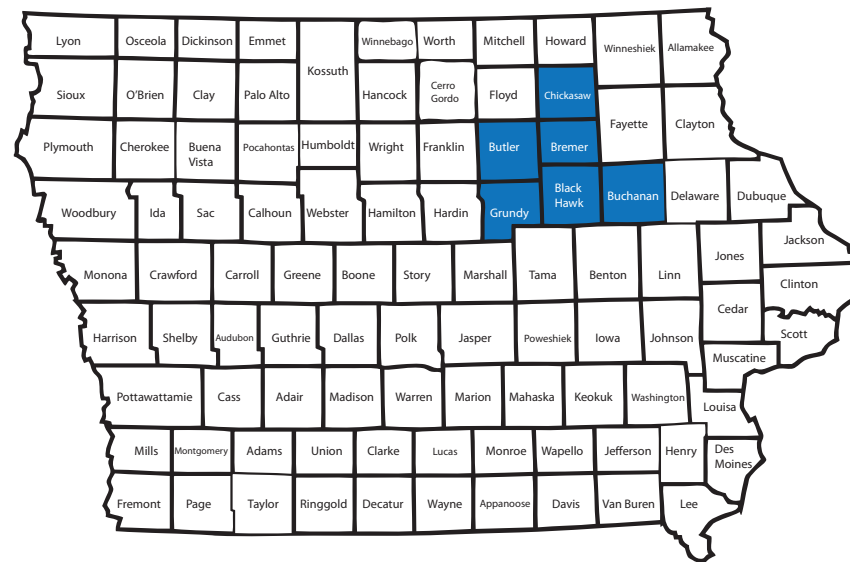
Clerk Associations

Network with your peers a little closer to home. Find the regional clerk group for your area. Boundary lines may not accurately reflect which cities belong to each group and in some cases groups have overlapping borders.

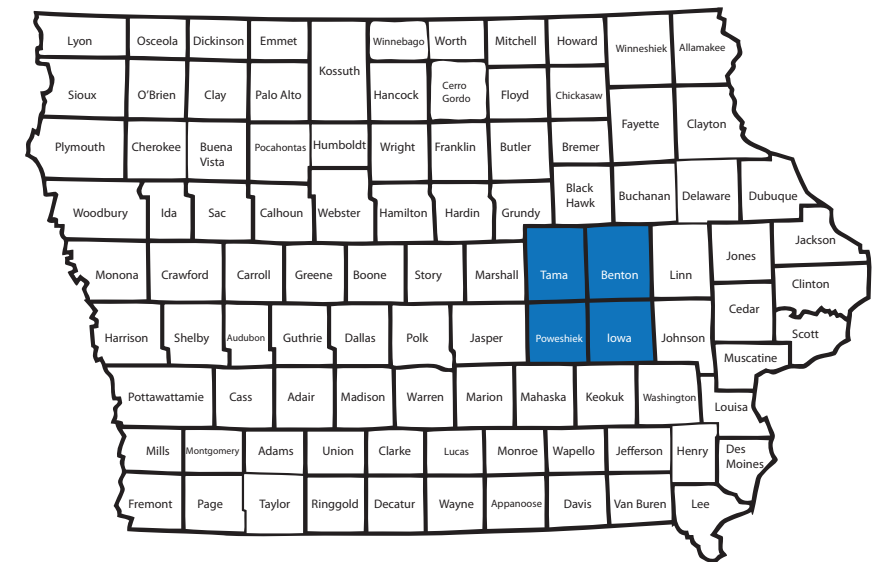
Northeast Iowa Clerk's Association



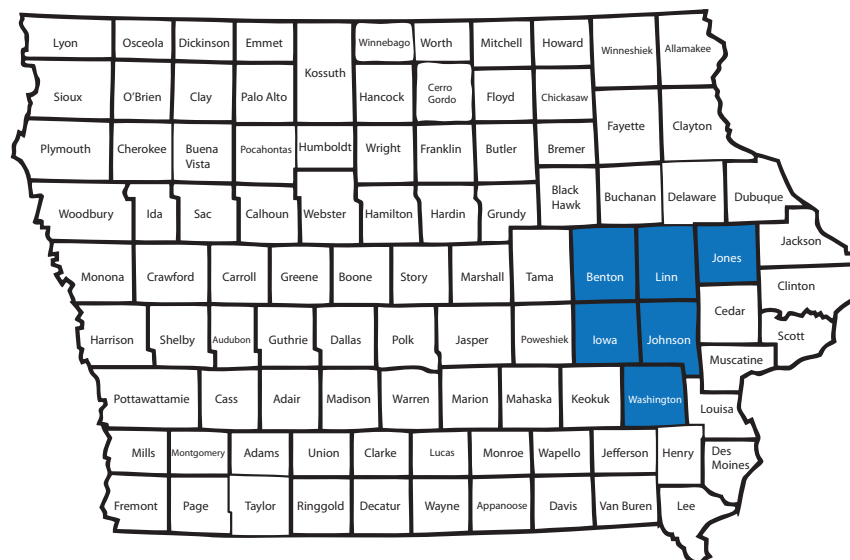
Iowa Northland Regional City Clerk/County Auditors



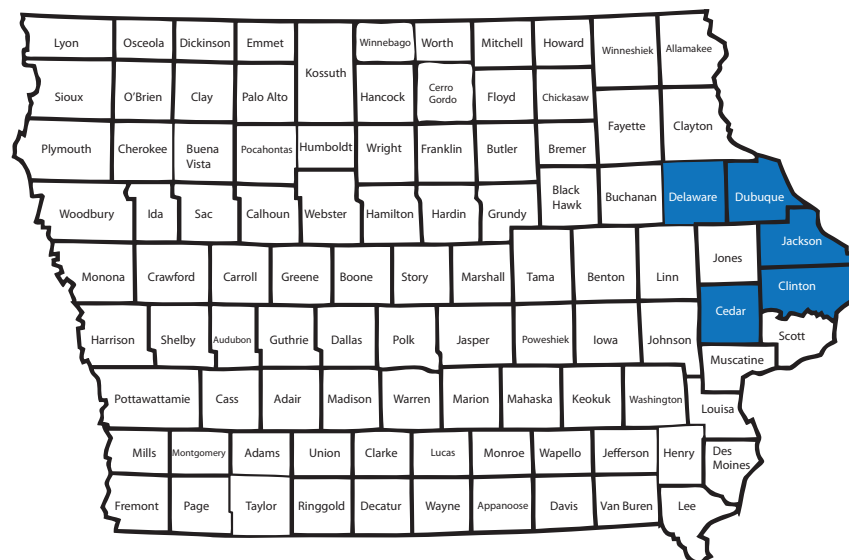
Central Iowa City Clerk's Association



East Central Iowa COG Clerk's Association



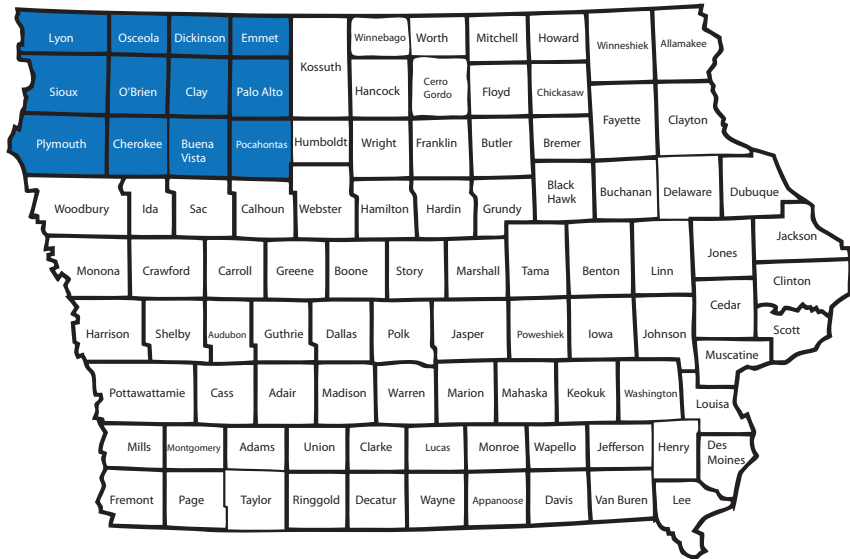
East Central Iowa Clerk's Association (ECICA)



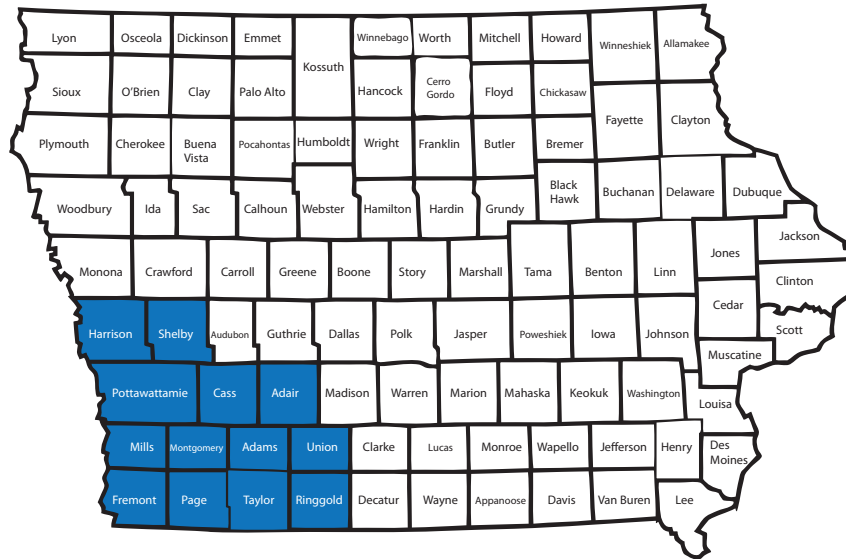
Southeast Iowa City Clerk's Association



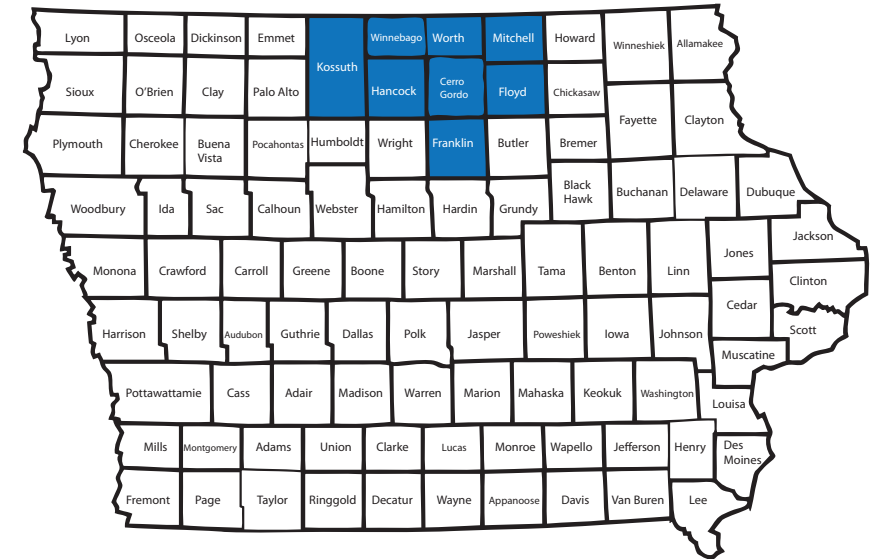
Northwest Iowa City Clerk's Association



Southwest Iowa Clerk's Association



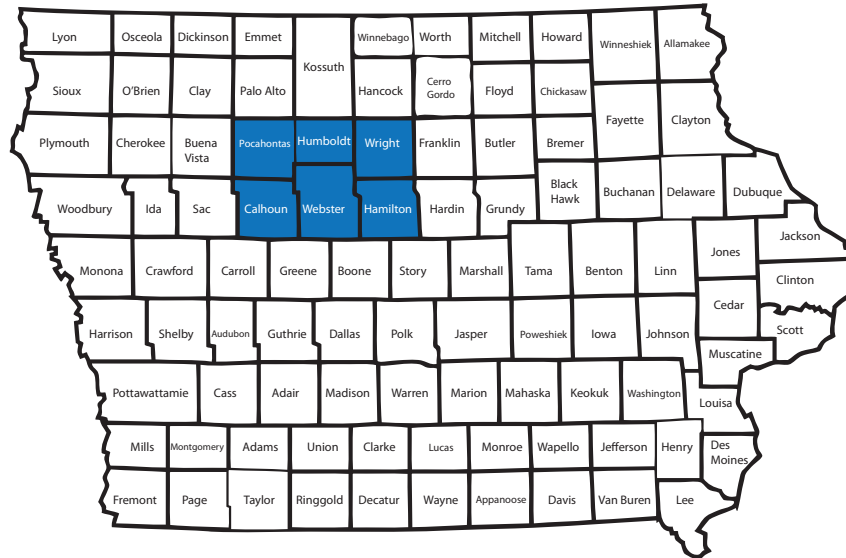
North Iowa City Clerk's Association



Tri-County Clerks



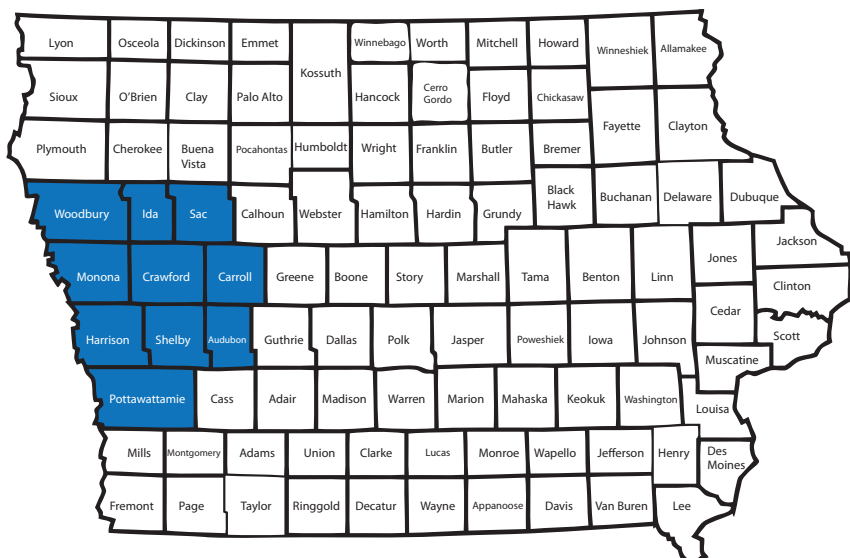
Region V Clerk/Administrator Association



Hardin County Clerks



West Central Iowa Clerk's Association



Southern Iowa Area Clerks



Golden Circle Municipal Officers Association



ONLINE LEARNING OPPORTUNITIES

The primary goal of IIMC is to actively promote the continuing education and professional development of Municipal Clerks through extensive education programs, certification, publications, networking, Annual Conferences and research.

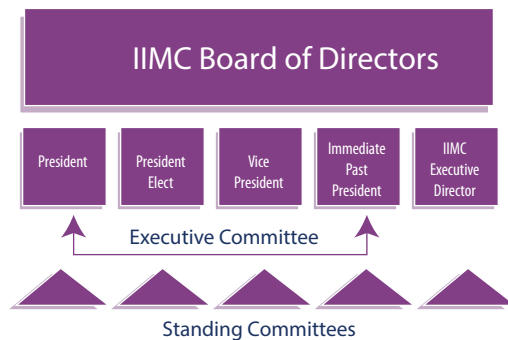
IIMC offers Online Learning opportunities designed as an additional means to provide completing certification requirements for the Certified Municipal Clerk (CMC) or Master Municipal Clerk (MMC) designations.



For more information, go to www.iimc.com.

IIMC ORGANIZATIONAL STRUCTURE

IIMC is governed by a 26-member Board of Directors with 22 Directors from IIMC's 11 regions. The Board sets policy and provides organizational governance.



COMMITTEES

Hundreds of dedicated IIMC members volunteer their services and skills on one of IIMC's many Committees. Committee members recommend policies and work on objectives ranging from Education and Professional Development to Election legislation updates to the dissemination of information on new technological advances affecting the Clerk's office. Committee contributions provide a cadre of direct benefits to the membership.

TYPES OF MEMBERSHIP

Membership Classes:

- 1) Full Member
- 2) Additional Full Member
- 3) Associate Member
- 4) Honorary Member
- 5) Retired Member

1) Full Member: Municipal Clerks, City Secretaries, Recorders, Legislative Administrators, Directors of Corporate, Business, or Administrative Services, and/or those with similar titles who serve Legislative Governmental Bodies in administrative capacities with management responsibilities and duties including four of the following:

- a. general management;
- b. meeting administration;
- c. financial management;
- d. stewardship of by-laws, articles of incorporation, ordinances, resolutions and other legal instruments;
- e. custody of the official seal and execution of official documents;
- f. records management;
- g. human resources;
- h. elections administration.

2) Additional Full Member: Individuals meeting the Full Member criteria who serve a Legislative Governmental Body represented by a Full Member.

3) Associate Member: Individuals in transition between Legislative Governmental Body positions or persons employed by a Legislative Governmental Body who do not meet Full Member criteria.

4) Honorary Member: Past Presidents upon retirement or upon assumption of positions with Legislative Governmental Bodies other than Municipal Clerk; Persons so designated by the Board of Directors who have made significant and exemplary contributions to IIMC and the profession.

5) Retired Member: Full, Additional Full or Associate Member upon retirement.

For complete details, contact IIMC's Membership Department by calling 909.944.4162.

IIMC EDUCATION FOUNDATION



Established in 1984, the IIMC Foundation raises funds needed to support IIMC in its mission to educate Municipal Clerks and keep them proficient in the services they provide for their community.

Since its inception, the Foundation has awarded more than \$1 million dollars toward scholarships and educational programs for IIMC members.

The Foundation has accepted the challenge of raising funds to help IIMC continue expanding educational offerings for members worldwide. Each year, the Foundation awards individual scholarships to Clerks attending IIMC's Institutes; conference grants; online education scholarships; and region grants. The Foundation's Board of committed volunteers also raises funds to support IIMC's priority education projects and fund IIMC's Annual Conference speakers and other education programs.

To learn more, apply for a scholarship or get involved, visit www.iimcfoundation.com.

ANNUAL CONFERENCE (May)

IIMC's Annual Conferences provide a unique and valuable educational experience for the participants ranging from intermediate to advanced level academic subjects facilitated by well qualified presenters. The Conference offers several Advanced Academy Sessions; Athenian Leadership Dialogues, keynote speakers for General Sessions, and a variety of Concurrent Education Sessions. The Conference also facilitates an environment for networking and exchange of ideas through its All Conference Event, an Exhibit Hall and Silent Auction.



INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS



The Premier Organization for Municipal Clerks Since 1947



The International Institute of Municipal Clerks
8331 Utica Avenue, Suite 200
Rancho Cucamonga, CA 91730

Tele: 909.944.4162
Fax: 909.944.8545
800.251.1639
E-mail: hq@iimc.com
www.iimc.com

WHO WE ARE

Founded in 1947, the International Institute of Municipal Clerks is the leading and largest professional nonprofit association serving the needs of Municipal Clerks worldwide. With approximately 15,000 members, IIMC represents municipalities of less than 500 to more than 10 million.

Diverse perspectives in IIMC Membership and Leadership are critical to the Organization's ongoing success. IIMC views its members' diverse backgrounds and interests as assets and is committed to promoting inclusive environments where members from across the Municipal Clerk profession feel valued, respected and welcomed. IIMC does not discriminate based on profession, race, gender, religion, age, sexual orientation, nationality, disability, appearance, geographic location or professional level. IIMC is committed to having Board members that are representative of the diverse make-up of its membership.

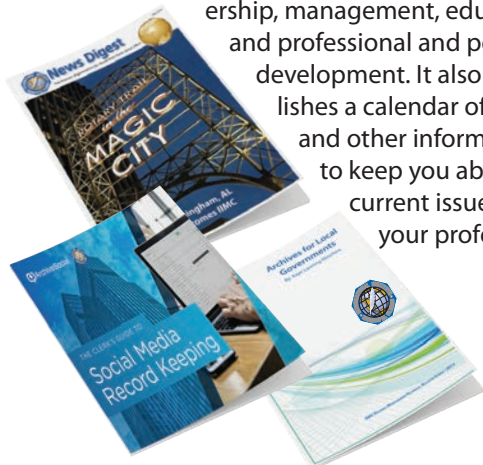
NETWORKING

Connect with approximately 15,000 colleagues worldwide in municipalities from Alaska to the United Kingdom and from Vermont to South Africa.



PUBLICATIONS

Online Monthly E-zine *News Digest* – IIMC's online monthly magazine is filled with domestic and international special features and articles on leadership, management, education, and professional and personal development. It also publishes a calendar of events and other information to keep you abreast of current issues facing your profession.



RESEARCH & INFORMATION CENTER

IIMC's Resource and Information Center offers you the latest in Municipal Clerks research, referrals, and materials to assist you in your job. It includes a reference library of sample ordinances, manuals, and technical and management publications. Publications on the Clerk's role in municipal government and electronic information exchange opportunities are also available.

Technical Bulletins

- Parliamentary Procedures
- Records Management
- Grant Writing
- Social Media Record Keeping

Clerk's Role In Local Government

- Role Call: The Professional Clerk
- Language of Local Government
- Robert's Rules of Order
- Mina's Guide to Minute Taking
- Maintaining the Democratic Imperative
- DVD: The Municipal Clerk: Partners In Democracy

Information Exchange

- IIMC Web Site
- Electronic discussion groups
- Clerk Listserv experts in various functions
- Compensation Information
- Online surveys
- Salary Surveys

PROFESSIONAL SUPPORT

- Sponsors the Annual Municipal Clerks Week by informing the public and local governments on the importance of the Municipal Clerk's Office.
- Networks with national and international Associations for Municipal Officials.
- Distributes news releases on members receiving their CMCs or MMCs.

EDUCATION

IIMC's primary purpose is to provide education and professional development programs and opportunities for its members. IIMC recognizes that education and professional development are important to every member and that educational needs are diverse throughout the world. IIMC offers extensive educational programs and courses through a variety of methods, including University and College based Institutes, State/Provincial/National Associations, Online courses, publications, webinars and Annual Conferences. IIMC values its affiliations with Municipal Clerk Associations and sponsoring educational institutions. IIMC provides members with certifications, earned through participation in educational programs and involvement in a variety of professional development activities. The educational programs and certifications offered through IIMC empower its members to achieve academic and professional success. IIMC offers two distinct educational designations: The Certified Municipal Clerk and the Master Municipal Clerk.

CERTIFIED MUNICIPAL CLERK (CMC)

The CMC designation program is designed to enhance the job performance of the Clerk in small and large municipalities. To earn the CMC designation, a Municipal Clerk must attend extensive education programs. The designation also requires pertinent experience in a municipality. The program prepares the participants to meet the challenges of the complex role of the Municipal Clerks by providing them with quality education in partnership with 45 institutions of higher learning. The program has been in existence since 1970 and has helped thousands of Clerks in various municipalities.

MASTER MUNICIPAL CLERK (MMC)

To qualify for entrance into the MMC program, one must have earned the CMC designation. The MMC is an advanced continuing education program that prepares participants to perform more complex municipal duties. The program has an extensive and rigorous educational component, and a professional and social contribution component.

MMC applicants must demonstrate that they have actively pursued educational and professional activities and have remained informed of current socio-political, cultural, and economic issues that affect local governments and municipalities.

BENEFITS OF MEMBERSHIP

IIMC sponsors education programs, engages in research, and fosters a spirit of mutual assistance and good fellowship among Clerks everywhere. Members have personal access to staff and a variety of opportunities and programs including:

- Networking & Volunteering
- Research & Resource Center
- Publications
- Education & Professional Development
- Professional Support
- University-based Institutes
- Online Learning Opportunities
- Municipal Clerks Week
- Annual Conferences
- Athenian Leadership Society Dialogues
- Study Abroad Programs
- International Symposiums
- Mentor/Mentee Program
- Affinity Programs

IIMC helps you find solutions to everyday problems, enhances critical professional skills and improves your performance at work.

Join IIMC now -- the only source exclusively dedicated to the advancement of Municipal Clerks.

WWW.IIMC.COM

