

IMFOA Certification Process

Spring 2025 IMFOA Conference

Agenda

- New Applications for Certification
 - Clerk/Finance Officer
 - Associate Clerk/Associate Finance Officer
- Renewal Application
- Common Issues
- Helpful Tips
- Questions

Types of Certification Applications

Certification For Municipal Professionals

NEW APPLICATION

City Clerk
OR
Finance Officer

Certification For Municipal Professionals

NEW APPLICATION

Associate City Clerk
OR
Associate Finance Officer

Certification For Municipal Professionals

RENEWAL APPLICATION

City Clerk
Finance Officer
Clerk Associate
Finance Associate



Certification For Municipal Professionals

NEW APPLICATION

City Clerk
OR
Finance Officer



NEW CERTIFICATION

Please select one ***separate application is required for each certification.**

- ☐ Iowa Certified Municipal Clerk (3 years of experience required)
- ☐ Iowa Certified Municipal Finance Officer (5 years of experience required)

PLEASE CHECK EACH BOX THAT IS APPLICABLE AND ENCLOSE THE REQUIRED SUPPORTING MATERIALS:

- ☐ I am currently a Municipal Clerk, Deputy Clerk, Finance Officer, Administrator or Treasurer.
- ☐ I am currently a member of IMFOA and have been a member for three (3) consecutive years within
The last five (5) years. Membership ID # _____
- ☐ I have attended at least one IMFOA conference (for a minimum of 5 hours) in the past four years.
Please list date of attendance _____
- ☐ I have listed the needed courses on my application **AND** have included my dashboard with the listed classes highlighted.

(PLEASE NOTE: Classes can only be used ONE time and cannot be used on more than one certification.)

- ☐ I have enclosed the \$150 application fee.
- ☐ I have completed the Municipal Professionals Institute. Year Completed _____
- ☐ I am currently an Iowa Certified Municipal Clerk.
- ☐ I am currently an Iowa Certified Municipal Finance Officer.
- ☐ I acknowledge that I must renew my certification every 4 years.

BASIC INFORMATION

Name
Last First Middle

(Use Name as Shown on IMFOA ID and/or dashboard)

Other name(s) you may have used (Maiden name; Nickname)

Title E-mail

Municipality Date Hired

Mailing Address P.O. Box

City Zip Code

Phone Alternate Phone

EMPLOYMENT DATES AND POSITIONS

Current Municipal Employer _____

Current position _____ Date you began this position _____

Previous position _____ Starting Date _____ End Date _____
Same Employer

Previous Municipal employment (location/dates)

MEDIA RELEASE (optional)

We are proud of your accomplishment and would like to send a press release/letter to one (1) local paper and/ or one local government official like your city manager or mayor. This is optional and you can leave this section blank if you prefer.

Local Newspaper

Name Email

Government Official

Name Title

Email

Address City State ZIP

PLEASE MAIL APPLICATION AND FEES TO:

IMFOA Certification Review Committee

Attn: Barb Barrick

515 N. Main

Huxley, IA 50124

The committee that reviews the applications are volunteers. It may take as long as 8-12 weeks before you receive your acknowledgement. Thank you for your patience and understanding!

EDUCATION

IMPORTANT: PLEASE READ ALL OF THE INSTRUCTIONS BELOW BEFORE COMPLETING THIS PORTION OF THE APPLICATION! INCOMPLETE APPLICATIONS WILL BE RETURNED.

1. A link to find a list of classes you have taken on the IMFOA dashboard is found here: <https://imfoa.com/account/>
2. You must **WRITE/TYPE** the hours and classes you are using for the certification you are applying for on the sheets provided. You may use a second sheet to list classes if needed.
3. Please include a copy of the dashboard, highlighting the classes you are using.
4. All workshops, courses, or educational offerings must be approved by the Curriculum Committee and will be listed on your dashboard as proof of attendance.
5. Classes on the dashboard might be LISTED in more than one place but you can only use the class ONE TIME either in Basic, Flexible or Specialized on one certification.
6. Classes need to be during the renewal period. Classes taken prior to renewal date will not be considered.
7. CLASSES CAN ONLY BE USED ON ONE CERTIFICATION TYPE, AND CANNOT BE DUPLICATED FOR A DIFFERENT CERTIFICATION. If you are applying for your second certification you only need to submit 25 hours of specialized credits, as you've already submitted your basic and flex.
8. Application and Code of Ethics (located on the last page of the application) must be signed and dated before application will be considered.

Note: IMFOA Certification Application Process FAQ's can be found at www.imfoa.com - Certification Program tab.

FLEXIBLE CURRICULUM - (25 education hours)

Please LIST classes and include a copy of your dashboard with classes highlighted.

- Regional Clerk's meetings—5 hours per year maximum
- Athenian Program—6 hours per year maximum
- Associate Degree will be awarded 15 hours credit and Bachelor's Degree or above will be awarded 25 hours credit if it meets below description

Degree must be in one of the following: public administration, urban affairs municipal management, political science, records management, municipal finance, governmental accounting, urban planning, or personnel administration.

[illegible]

SPECIALIZED CURRICULUM - (25 education hours)

Please LIST classes and include a copy of your dashboard with classes highlighted.

[illegible]

MUNICIPAL OFFICER CODE OF ETHICS

As a Municipal Officer, I believe:

That the proper operation of democratic government and fiscal administration requires that public employees be independent and impartial in their judgment and actions; that decisions and policy be made in the proper channels of the governmental structure; that public office not be used for personal gain; and that the public have confidence in the integrity of its government and employees.

Consequently, I believe it is my duty to:

- 1. Respect the importance of American ideals of government, the rule of law, and ethical conduct in the performance of my municipal duties.*
- 2. Work in full cooperation with other public employees in promoting the public welfare, recognizing that my private interest must be subordinate to the public interest.*
- 3. Be scrupulously honest in handling public funds and in the conservation of public property, never using any funds or property under my care for private benefit of myself or others.*
- 4. Refrain from disclosing confidential information concerning the city government, or granting any special treatment, consideration, or advantage to any citizen beyond that available to every other citizen.*
- 5. Refrain from accepting gifts or favors or promise of future benefits which might compromise my independence of judgment or action as a City Clerk / Finance Officer.*
- 6. Conduct myself in my private affairs in such a manner as not to bring discredit to public service, or the community and City Council which I serve.*
- 7. Endeavor always to establish and maintain the highest standards of fiscal administration.*

☐ I hereby apply for certification under the Iowa Certification for Municipal Professionals Program, and attest that the previous statements and presentations are accurate and true to the best of my knowledge. I further attest to support the Municipal Officer Code of Ethics. I acknowledge that continuous membership in IMFOA is required to retain and use the Iowa Certification designation(s) and that I must renew my certification(s) every 4 years.

Printed Name _____

Signature _____

Note: Electronic Signature will not be accepted!

Date _____
(this will be your beginning certification date)



Certification For Municipal Professionals

NEW APPLICATION

Associate City Clerk
OR
Associate Finance Officer



REQUESTED NEW CERTIFICATION FOR ASSOCIATE

Please select one ***separate application is required for each certification.**

- ☐ Iowa Certified Municipal Clerk **Associate** (3 years of experience required)
- ☐ Iowa Certified Municipal Finance Officer **Associate** (5 years of experience required)

PLEASE CHECK EACH BOX THAT IS APPLICABLE AND ENCLOSE THE REQUIRED SUPPORTING MATERIALS:

- ☐ I am currently a member of IMFOA and have been a member for three (3) consecutive years within the last five (5) years. Membership ID #_____
 - ☐ I have attended at least one IMFOA conference (for a minimum of 5 hours) in the past four years. Please list date of attendance _____
 - ☐ I have attached a letter of verification of employee duties from a representative of the city who has oversight of my position.
 - ☐ I have listed the needed courses on my application **AND** have included my dashboard with the listed classes highlighted.
 - ☐ Classes need to be during the renewal period.
- (PLEASE NOTE: Classes can only be used ONE time and cannot be used on more than one certification.)***
- ☐ I have enclosed the \$150 application fee. _____
 - ☐ I have completed the Municipal Professionals Institute. Year Completed _____
 - ☐ I am currently an Iowa Certified Municipal Clerk Associate.
 - ☐ I am currently an Iowa Certified Municipal Finance Officer Associate.
 - ☐ I acknowledge that I must renew my certification every 4 years.

BASIC INFORMATION

Name
Last First Middle
(Use Name as Shown on IMFOA ID and/or dashboard)

Other name(s) you may have used (Maiden name; Nickname)

Title E-mail

Municipality Date Hired

Mailing Address P.O. Box

City Zip Code

EMPLOYMENT DATES AND POSITIONS

Current Municipal Employer _____

Current position _____ Date you began this position _____

Previous position _____ Starting Date _____ End Date _____
Same Employer

Previous Municipal employment (location/dates) _____

MEDIA RELEASE (optional)

We are proud of your accomplishment and would like to send a press release/letter to one (1) local paper and/ or one local government official like your city manager or mayor. This is optional and you can leave this section blank if you prefer.

Local Newspaper

Name Email

Government Official

Name Title

Email

Address City State ZIP

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Attn: Barb Barrick
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Huxley, IA 50124

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REQUIREMENTS FOR AN ASSOCIATE CERTIFICATION

You must have 2 of the 7 requirements listed below to earn a Clerk or Finance Associate Certification. Please mark below those items that are part of your regular position.

- ☐ Assist in General Administration
- ☐ Assist in Records Duties
- ☐ Assist in Meeting Administration
- ☐ Manage By-Laws, Ordinances, etc.
- ☐ Assist in HR Duties
- ☐ Assist in Financial Duties
- ☐ Custody of official seal and documents

Note: Assisting in the above areas are not to be construed as management or held responsible for.

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BASIC CURRICULUM 50 education hours are required from Iowa State University Municipal Professionals Institute.

*Date you completed 50-hour Core Curriculum _____ (required)

Please LIST classes and include a copy of your dashboard with classes highlighted.

DATE	COURSE TITLE	SPONSOR	CONTACT HOURS

FLEXIBLE CURRICULUM - (25 education hours)

Please LIST classes and include a copy of your dashboard with classes highlighted.

- Regional Clerk's meetings—5 hours per year maximum
- Athenian Program— 6 hours per year maximum
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Degree must be in one of the following: public administration, urban affairs municipal management, political science, records management, municipal finance, governmental accounting, urban planning, or personnel administration.

DATE	COURSE TITLE	SPONSOR	CONTACT HOURS

SPECIALIZED CURRICULUM - (25 education hours)

Please LIST classes and include a copy of your dashboard with classes **highlighted**.

DATE	COURSE TITLE	SPONSOR	CONTACT HOURS

MUNICIPAL OFFICER CODE OF ETHICS

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Consequently, I believe it is my duty to:

- 1. Respect the importance of American ideals of government, the rule of law, and ethical conduct in the performance of my municipal duties.*
- 2. Work in full cooperation with other public employees in promoting the public welfare, recognizing that my private interest must be subordinate to the public interest.*
- 3. Be scrupulously honest in handling public funds and in the conservation of public property, never using any funds or property under my care for private benefit of myself or others.*
- 4. Refrain from disclosing confidential information concerning the city government, or granting any special treatment, consideration, or advantage to any citizen beyond that available to every other citizen.*
- 5. Refrain from accepting gifts or favors or promise of future benefits which might compromise my independence of judgment or action as a City Clerk / Finance Officer.*
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☐ I hereby apply for certification under the Iowa Certification for Municipal Professionals Program, and attest that the previous statements and presentations are accurate and true to the best of my knowledge. I further attest to support the Municipal Officer Code of Ethics. I acknowledge that continuous membership in IMFOA is required to retain and use the Iowa Certification designation(s) and that I must renew my certification(s) every 4 years.

Printed Name _____

Signature _____

Note: Electronic Signature will not be accepted!

Date _____

(this will be your beginning certification date)



Certification For Municipal Professionals

RENEWAL APPLICATION

City Clerk

Finance Officer

Clerk Associate

Finance Associate



RENEWAL CERTIFICATION:

Please select one ***a separate application is required for each certification.**

- ☐ Iowa Certified Municipal Clerk
- ☐ Iowa Certified Municipal Finance Officer
- ☐ Iowa Certified Municipal Clerk Associate
- ☐ Iowa Certified Municipal Finance Officer Associate

PLEASE CHECK EACH BOX THAT IS APPLICABLE AND ENCLOSE THE REQUIRED SUPPORTING MATERIALS:

- ☐ I am currently a member of IMFOA and have been a member for three (3) consecutive years within the last five (5) years. Membership ID # _____
- ☐ I have attended at least one IMFOA conference (for a minimum of 5 hours) in the past four years.
Please list date of attendance _____
- ☐ I have listed the needed courses on my application **AND** have included my dashboard with the listed classes highlighted.
- ☐ Classes need to be during the renewal period.

(PLEASE NOTE: Classes can only be used ONE time and cannot be used on more than one certification.)

- ☐ I have enclosed the \$75 application fee.
- ☐ I am currently an Iowa Certified Municipal Clerk.
- ☐ I am currently an Iowa Certified Municipal Finance Officer.
- ☐ I am currently an Iowa Certified Municipal Clerk Associate.
- ☐ I am currently an Iowa Certified Municipal Finance Officer Associate.
- ☐ I acknowledge that I must renew my certification every 4 years.

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Last First Middle
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Title E-mail

Municipality Date Hired

Mailing Address P.O. Box

EMPLOYMENT DATES AND POSITIONS

Current Municipal Employer _____

Current position _____ Date you began this position _____

☐ I have **NOT** changed my employment since last certified – If you have changed, please list municipalities and dates:

☐ I am a current IMFOA member and have been for the past four (4) years – If No, please explain:

Expiration of current certification _____

Submittal date _____

**Renewal must be submitted by expiration date on current certification.*

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CURRICULUM – It is recommended you get 15 contact hours of continuing education EACH YEAR. 60 education hours total are required to maintain your certification.

Please LIST classes and include a copy of your dashboard with classes highlighted.

- Regional Clerk's meetings – 5 hours per year maximum
- Athenian Program – 6 hours per year maximum

DATE	COURSE TITLE	SPONSOR	CONTACT HOURS

MUNICIPAL OFFICER CODE OF ETHICS

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- 5. Refrain from accepting gifts or favors or promise of future benefits which might compromise my independence of judgment or action as a City Clerk / Finance Officer.*
- 6. Conduct myself in my private affairs in such a manner as not to bring discredit to public service, or the community and City Council which I serve.*
- 7. Endeavor always to establish and maintain the highest standards of fiscal administration.*

☐ I hereby apply for re-certification under the Iowa Certification for Municipal Professionals Program, and attest that the previous statements and presentations are accurate and true to the best of my knowledge. I further attest to support the Municipal Officer Code of Ethics. I acknowledge that continuous membership in IMFOA is required to retain and use the Iowa Certification designation(s) and that I must renew my certification(s) every 4 years.

Printed Name _____

Signature _____

Note: Electronic Signature will not be accepted!

Date _____

Common Issues

- Completing the wrong application
- Not listing all courses on Education pages
- Listing courses not the on the DASHBOARD
- Not providing DASHBOARD
- Using hours not during the renewal period
- Not enough hours
- No IMFOA conference attendance for minimum of 5 hours
- Past 90 day renewal & need extra hours
- Years of experience
 - 3 years for clerk certification
 - 5 years for finance officer certification

Common Issues

- Checks made out to wrong organization. Pay IMFOA
- Mailed to wrong person. Mail to Barb Barrick in Huxley
- Please send a separate check for each application

Helpful Tips

- Print legibly or type your application
- Use your IMFOA dashboard
- List each course & may want to consider numbering the courses on your dashboard to your Education Page
- Use the name of the course as listed on the dashboard
- Use ink, no pencil
- Single sided application, not back-to-back
- One check per application



Questions???