



New Application  
Process and Credit  
Guidelines for  
**IMFOA**  
Certifications

# Agenda for Today's Presentation



- Introduction to IMFOA's New Policies
- New Credit Guidelines Overview
- Detailed Application Process
- Support and Resources
- Q&A Session

# Rationale Behind the New Policies

## Consistent Credit Standards

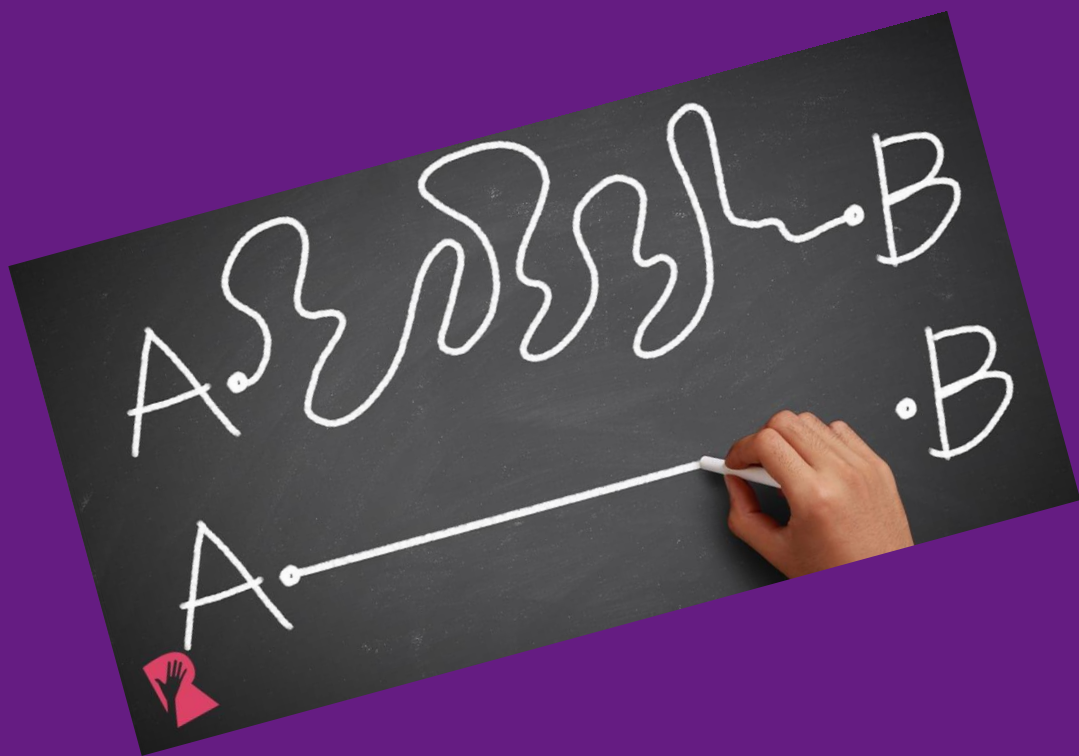
The policies establish consistent credit standards to increase clarity for all applicants.

## Streamlining Application Process

The new policies aim to simplify and expedite the application process for all applicants.

## Improving Transparency

These policies enhance transparency, ensuring that applicants understand the requirements and status of their applications clearly.



1. Require attendance at a minimum of two IMFOA Conferences (12 credit hours total) within each four-year renewal period.
2. Require a minimum of one Municipal Professionals Academy (8 credit hours total) within each four-year renewal period.
3. Only credits obtained from IMFOA and its designated partners will apply to a member's certification and recertification educational requirements.

IMFOA Certification Educational Opportunities	Estimate total credit hours
<b>Iowa Municipal Finance Officers Association (IMFOA)</b>	
Spring Conference	Up to 15
Fall Conferences	Up to 15
<b>Iowa State University and Governmental</b>	
Municipal Professional Institute (MPI)	Up to 16
Municipal Professionals Academy (MPA)	Up to 16
<b>Iowa League of Cities - formal training and conferences</b>	
City Finance 101 Workshop	Up to 2
Nuisance Abatement	Up to 4
Budget Workshops	Up to 4
Annual Conference	Up to 8
Small Cities	Up to 2
<b>Iowa Department of Transportation</b>	
Street Finance Report Training - In person Only	Up to 5
<b>Iowa Department of Management</b>	
In person only	Up to 5
<b>International Institute of Municipal Clerks</b>	
IIMC Annual Conference	Up to 4
Region VI - Mid-Winter Meeting	Up to 4
<b>Government Finance Officers Association (GFOA)</b>	
Annual Conference	Up to 4
<b>Iowa Employment Conference</b>	
Spring Conference	Up to 4
Fall Conference	Up to 4
<b>Iowa Association of Municipal Utilities</b>	
In person only	Up to 5
<b>Iowa City/County Management Association - IMMI</b>	
In person only	Up to 6



Certification For Municipal Professionals

**RENEWAL APPLICATION**

City Clerk

Finance Officer

Clerk Associate

Finance Associate



Certification For Municipal Professionals

**RENEWAL APPLICATION**

City Clerk

Finance Officer

Clerk Associate

Finance Associate



30 credit hours to maintain Clerk Certification

30 credit hours to maintain Finance Officers Certification

Totaling 60 credit hours in my four-year renewal period.

# Year 1

- Attend IMFOA Spring Conference – 8 credit hrs.
- Attend MPA – 16 credit hrs.
- Attend IMFOA Fall Conference – 8 credit hrs.

# Year 2

- Attend IMFOA Spring Conference – 8 credit hrs.
- Attend MPA – 16 credit hrs.
- Attend IMFOA Fall Conference – 8 credit hrs.

# Year 3

- Attend IMFOA Spring Conference – 8 credit hrs.
- Attend IMFOA Fall Conference – 10 credit hrs.

# Year 4

- Attend IMFOA Spring Conference - 10 Credit hrs.
- Attend MPA – 16 Credit hrs.
- Attend Leagues Nuisance Abatement – 4 credit hrs.
- Attend IMFOA Fall Conference - 10 credit hrs.

1. ✓

Require attendance at a minimum of two IMFOA Conferences (12 credit hours total) within each four-year renewal period.

2. ✓

Require a minimum of one Municipal Professionals Academy (8 credit hours total) within each four-year renewal period.

3. ✓

Only credits obtained from IMFOA and its designated partners will apply to a member's certification and recertification educational requirements.

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Budget Workshops	Up to 4
Annual Conference	Up to 8
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Street Finance Report Training - In person Only	Up to 5
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<b>International Institute of Municipal Clerks</b>	
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Region VI - Mid-Winter Meeting	Up to 4
<b>Government Finance Officers Association (GFOA)</b>	
Annual Conference	Up to 4
<b>Iowa Employment Conference</b>	
Spring Conference	Up to 4
Fall Conference	Up to 4
<b>Iowa Association of Municipal Utilities</b>	
In person only	Up to 5
<b>Iowa City/County Management Association - IMMI</b>	
In person only	Up to 6

# My Timeline:

CALENDAR

CALENDAR

CALENDAR

CALENDAR

Submit no  
more than 60  
days prior

~~September 15,  
2027~~

September 25,  
2027

Certificate  
Expiration  
Date

November 15,  
2027

Submit no  
less than 90  
days after

February 13,  
2028

Notification  
within 8  
weeks from  
the 1<sup>st</sup> of the  
month  
following  
submission

The week of April  
19 - 23



# How Not To Get Carpal Tunnel While Filling Out Your Application




# Log onto IMFOA.com

**IMFOA Online Store Open!**

Password: imfoa

Trish Gleason IMFOA Candidate ID: 10726



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[No Title]

# Welcome to IMFOA

IMFOA Online Store Open!

Password: imfoa



My Profile

Payments

Subscriptions

Jump to ClerkNet

Certification Dashboard

## Profile

Welcome to IMFOA's new online headquarters! To return to the home page at any time, click the IMFOA logo in the top left of the screen.

Jump to ClerkNet

**\*\*Please when trying to login you need to use your username and not your email address\*\***

Certification Dashboard



**IMFOA**  
Iowa Municipal Finance  
Officers Association

## Certification Tracking System

Your access to this site is managed by IMFOA.com and uses the same credentials.

If the password reset process at IMFOA.com is not working for you, use the **Contact IMFOA form**.

### Log In

User Name: Tgleason

Password: .....

Remember me next time.

Log In



# Certification Tracking System

You are here [Home](#) > Curriculum Dashboard

## My Details

### Curriculum Dashboard

#### Iowa Municipal Professionals Institute Curriculum

date created: 4/10/2025

### Courses

Candidate Selected : **Trish Gleason**

View this Certification : --SELECT--

Apply for Certification : --SELECT--

#### BASIC Courses

#### FLEX Courses

- 2007** [ 3 hrs ] **FX250MPI: Best Practices in City Government** : FX250MPI (Iowa State University/Office of State & Local Government Programs) 3hrs
- 2008** [ 15 hrs ] **MPA 2008** (Iowa State University/Office of State & Local Government Programs)
- 2009** [ 15 hrs ] **MPA 2009** (Iowa State University/Office of State & Local Government Programs)
- 2018** [ 1.5 hrs ] **Common Human Resource Issues Impacting Cities** : 2018 IMFOA Spring Conference (Iowa Municipal Finance Officers Assn) 1.5hrs
- 2018** [ 3 hrs ] **In's & Out's of Being a City Clerk/Finance Officer** : 2018 IMFOA Spring Conference (Iowa Municipal Finance Officers Assn) 3hrs
- 2018** [ 1 hrs ] **Lean Processes** : 2018 IMFOA Spring Conference (Iowa Municipal Finance Officers Assn) 1hrs



# Certification Tracking System

You are here [Home](#) > Curriculum Dashboard

## My Details

### Curriculum Dashboard

#### Iowa Municipal Professionals Institute Curriculum

date created: 4/10/2025

### Courses

Candidate Selected : **Trish Gleason**

View this Certification : --SELECT--

Apply for Certification : --SELECT--

--SELECT--

**BA** Iowa Certified Municipal Clerk - Renewal 2026

Iowa Certified Municipal Finance Officer - Renewal 2026

**FLE** Iowa Certified Municipal Clerk - Renewal 2025

Iowa Certified Municipal Finance Officer - Renewal 2025

**2007** [ 3 hrs ] **FX250MPI: Best Practices in City Government** : FX250MPI (Iowa State University/Office of State & Local Government Programs) 3hrs

Iowa Certified Municipal Clerk - Renewal 2024

Iowa Certified Municipal Finance Officer - Renewal 2024

**2008** [ 15 hrs ] **MPA 2008** (Iowa State University/Office of State & Local Government Programs)

Iowa Certified Municipal Clerk - Renewal 2023

Iowa Certified Municipal Finance Officer - Renewal 2023

**2009** [ 15 hrs ] **MPA 2009** (Iowa State University/Office of State & Local Government Programs)



- 2021** [ 2 hrs ] **Insurance Requirements in Construction Agreements** : 2021 Summer MPA (Iowa State University/Office of State & Local Government Programs) 2hrs

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- 2021** [ 1 hrs ] **League Update** : 2021 IMFOA Fall Conference (Iowa Municipal Finance Officers Assn) 1hrs

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- 2021** [ 1.5 hrs ] **Third Degree with HR** : 2021 IMFOA Fall Conference (Iowa Municipal Finance Officers Assn) 1.5hrs

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- 2022** [ 1 hrs ] **2022 IMFOA Fall Conf: Changes to Open Records Request** : 2022 IMFOA Fall Conference (Iowa Municipal Finance Officers Assn) 1hrs

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- 2022** [ 1.5 hrs ] **2022 IMFOA Fall Conf: Disaster Readiness/Recovery** : 2022 IMFOA Fall Conference (Iowa Municipal Finance Officers Assn) 1.5hrs

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- 2022** [ 2 hrs ] **2022 IMFOA Fall Conf: Econ Dev Tools + Best Practices for Policies & Procedures** : 2022 IMFOA Fall Conference (Iowa Municipal Finance Officers Assn) 2hrs

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- 2022** [ 1 hrs ] **2022 IMFOA Fall Conf: Iowa Land Records** : 2022 IMFOA Fall Conference (Iowa Municipal Finance Officers Assn) 1hrs

---

- 2022** [ 1 hrs ] **2022 IMFOA Fall Conf: LIHWAP, LIHEAP, Customer Service** : 2022 IMFOA Fall Conference (Iowa Municipal Finance Officers Assn) 1hrs

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- 2022** [ 1.5 hrs ] **2022 IMFOA Fall Conf: Public Bidding, More Than Just the Low Quote** : 2022 IMFOA Fall Conference (Iowa Municipal Finance Officers Assn) 1.5hrs

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- 2022** [ 2 hrs ] **Budget for Debt, TIF and Transfers** : 2022 Summer MPA (Iowa State University/Office of State & Local Government Programs) 2hrs

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- 2022** [ 2 hrs ] **Change Blows: Leading in Uncertain Times** : 2022 Summer MPA (Iowa State University/Office of State & Local Government Programs) 2hrs

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- 2022** [ 1.5 hrs ] **Cybersecurity (OCIO)** : 2022 IMFOA Spring Conference (Iowa Municipal Finance Officers Assn) 1.5hrs



## Certification Tracking System

You are here :Home > Curriculum Dashboard

My Details  
Curriculum Dashboard  
Courses

### Iowa Municipal Professionals Institute Curriculum

date created: 4/10/2026

Candidate Selected : Trish Gleason

View this Certification :

Apply for Certification :

**Iowa Certified Municipal Clerk - Renewal 2026**

Start Date : 04/10/2026 Expiration Date : 04/10/2030

Hours Completed: 61  
Hours Needed: 60  
Hours Remaining: 0



#### BASIC Courses

#### FLEX Courses

**2007** [ 3 hrs ] **FX250MPI: Best Practices in City Government** : FX250MPI (Iowa State University/Office of State & Local Government Programs) 3hrs

**2008** [ 15 hrs ] **MPA 2008** (Iowa State University/Office of State & Local Government Programs)

**2009** [ 15 hrs ] **MPA 2009** (Iowa State University/Office of State & Local Government Programs)

**Common Human Resource Issues Impacting Cities** : 2018 IMFOA Spring

DOWNLOAD PDF

Or Use Browser Print

Tip: The PDF will automatically download to your default Downloads folder. If download doesn't start, try the "Use Browser Print" option.

### How to Submit Your Dashboard Certification Application

1. Click the "Download PDF" button above to automatically generate and save the PDF
2. The PDF will be saved to your Downloads folder
3. Login to the IMFOA website at <https://imfoa.com>
4. Use the IMFOA Certification Application Form and upload the saved PDF as your supporting documentation when asked to do so.
5. Submit your application and payment.

**Note:** This submission of your dashboard information for supporting documentation only. The Certification Committee will notify you of their decision.

## Iowa Municipal Finance Officers Association Certification Request Certification

Generated: April 10, 2026 02:39 PM

### Candidate Information

**Name:** Trish Gleason  
**Candidate ID:** 10726

### Requested Certification

**Iowa Certified Municipal Clerk - Renewal 2026**  
Iowa Certified Municipal Clerk - Renewal 2026

2023 [2 hrs]	2023 IMFOA Fall Conf. Capital Project Planning (Iowa Municipal Finance Officers Assn)
2023 [2 hrs]	2023 IMFOA Fall Conf. Open Meetings and Public Records (Iowa Municipal Finance Officers Assn)
2023 [2 hrs]	2023 IMFOA Fall Conf. Human Resource Learning (Iowa Municipal Finance Officers Assn)
2023 [1 hrs]	2023 IMFOA Fall Conf. Social Media (Iowa Municipal Finance Officers Assn)
2023 [2 hrs]	2023 IMFOA Fall Conf. De-Escalation (Iowa Municipal Finance Officers Assn)
2023 [2 hrs]	Questions, Discussions, and Updates (Iowa State University/Office of State & Local Government Programs)
2023 [2 hrs]	Nurturing Resilience in Ourselves and Others (Iowa State University/Office of State & Local Government Programs)
2023 [2 hrs]	Civility in the Workplace (Iowa State University/Office of State & Local Government Programs)
2023 [2 hrs]	Navigating FLSA and FMLA: Common and Uncommon Questions (Iowa State University/Office of State & Local Government Programs)
2023 [2 hrs]	Managing Council Meetings: a Parliamentary Refresher (Iowa State University/Office of State & Local Government Programs)
2023 [4 hrs]	The Key Ingredient for a Healthy Organization (Iowa State University/Office of State & Local Government Programs)
2023 [2 hrs]	FEMA (Iowa State University/Office of State & Local Government Programs)
2023 [8 hrs]	Annual Conference (International Institute of Municipal Clerks)
2023 [1.5 hrs]	2023 IMFOA Spring Conf. Nuts & Bolts of City Codes (Iowa Municipal Finance Officers Assn)
2023 [1 hrs]	2023 IMFOA Spring Conf. Legislative Update (Iowa Municipal Finance Officers Assn)
2023 [1.5 hrs]	2023 IMFOA Spring Conf. A to Z with the ABD (Iowa Municipal Finance Officers Assn)

# Save your PDF to your desktop

2022 [2 hrs]	Records Management Systems (Iowa State University/Office of State & Local Government Programs)
2022 [2 hrs]	Language of Leadership (Iowa State University/Office of State & Local Government Programs)
2022 [2 hrs]	TIF and Other Tools for Economic Development & Redevelopment in Iowa's Cities (Iowa State University/Office of State & Local Government Programs)
2022 [1.5 hrs]	Minutes Resolutions Ordinances and Public Hearings (Iowa Municipal Finance Officers Assn)
2022 [1 hrs]	Legislative Update (Iowa Municipal Finance Officers Assn)
2022 [1.5 hrs]	Cybersecurity (OCIO) (Iowa Municipal Finance Officers Assn)
2022 [2 hrs]	HR In and Out (Iowa Municipal Finance Officers Assn)
2022 [1 hrs]	Record Retention (Iowa Municipal Finance Officers Assn)
2022 [1 hrs]	Nuisances (Iowa Municipal Finance Officers Assn)

**Section Total: 61 hours**

### Hours Summary

<b>Hours Selected:</b>	<b>61 hours</b>
<b>Hours Required:</b>	60 hours

For Committee Use Only:

Reviewed By: \_\_\_\_\_  
Date: \_\_\_\_\_  
Decision: \_\_\_\_\_

Now You Are Ready To  
Submit Your Online  
Application

**IMFOA Online Store Open!**

Password: imfoa

Trish Gleason IMFOA Candidate ID: 10726



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Events & Conferences ▾

Membership ▾

**MY ACCOUNT** >

# IMFOA Certification Application

# BASIC INFORMATION

---

Name

Trish

Gleason

First

Last

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

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

Pat

Title

Assistant City Clerk

Email

Tgleason@cityofdubuque.org

Municipality

Dubuque

Date Hired

City Address

Street Address

Address Line 2

City

State

ZIP / Postal Code

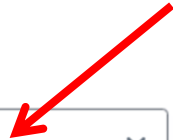
City Phone

Alternate Phone

# CERTIFICATION REQUEST

Requesting Certification For:

NEW Certification: Iowa Certified Municipal Clerk (3 years of experience required)



Eligibility & Experience Requirements **(Required)**

- I meet the required clerk/clerk associate: 3 years of experience
- I meet the required finance officer/finance officer associate: 5 years of experience
- I have attended at least one IMFOA conference (for a minimum of 12 hours) in the past four years.
- I have completed the Municipal Professionals Institute.

I am a current IMFOA member and have been for the past four (4) years: **(Required)**

- Yes
- No

IMFOA Membership ID # **(Required)**

Requesting Certification For:

NEW Certification: Iowa Certified Municipal Clerk (3 years of experience required) ▼

**NEW Certification: Iowa Certified Municipal Clerk (3 years of experience required)**

NEW Certification: Iowa Certified Municipal Finance Officer (5 years of experience required)

NEW Certification: Iowa Certified Municipal Clerk Associate (3 years of experience required)

NEW Certification: Iowa Certified Municipal Finance Officer Associate (5 years of experience required)

RENEWAL Certification: Iowa Certified Municipal Clerk

RENEWAL Certification: Iowa Certified Municipal Finance Officer

RENEWAL Certification: Iowa Certified Municipal Clerk Associate

RENEWAL Certification: Iowa Certified Municipal Finance Officer Associate

# CERTIFICATION REQUEST

---

Requesting Certification For:

NEW Certification: Iowa Certified Municipal Clerk (3 years of experience required) ▼

Eligibility & Experience Requirements **(Required)**

- I meet the required clerk/clerk associate: 3 years of experience
- I meet the required finance officer/finance officer associate: 5 years of experience
- I have attended at least one IMFOA conference (for a minimum of 12 hours) in the past four years.
- I have completed the Municipal Professionals Institute.

I am a current IMFOA member and have been for the past four (4) years: **(Required)**

- Yes
- No

IMFOA Membership ID # **(Required)**

10726

# EMPLOYMENT DATES AND POSITIONS

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Current Municipal Employer


City of Dubuque

Current position

Assistant City Clerk

Date you began this position

mm/dd/yyyy



Employment History

- I have NOT changed my employment since last certified
- I HAVE changed my employment since last certified

Employment History

I have NOT changed my employment since last certified

I HAVE changed my employment since last certified

Please List Past Municipalities and Dates

Past Municipalities

City of Newhall

Dates Employed

01/01/2005 to 01/18/2012



# UPLOAD SUPPORTING DOCUMENTATION



I confirm that all course dates submitted are within my renewal period. I understand that any courses submitted outside of my renewal period will be denied and that a \$35 resubmittal plus the original fee fee will be incurred.



I am resubmitting my application.

Choose File

No file chosen

Max. file size: 20 MB.

Upload your Dashboard Certification Application PDF which should be saved in your downloads folder.

# UPLOAD SUPPORTING DOCUMENTATION

---



I confirm that all course dates submitted are within my renewal period. I understand that any courses submitted outside of my renewal period will be denied and that a \$35 resubmittal plus the original fee fee will be incurred.



I am resubmitting my application.

Choose File

No file chosen

Max. file size: 80 MB.

Upload your Dashboard Certification Application PDF which should be saved in your downloads folder.

# ACKNOWLEDGEMENT

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## 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.

**Acknowledgment (Required)**



I support the Municipal Officer Code of Ethics



I acknowledge that IMFOA certifications must be renewed every four (4) years.



I certify that all information submitted is accurate and complete to the best of my knowledge.



I understand the committee that reviews the applications are volunteers. It may take as long as 8 – 12 weeks before you receive your acknowledgement.

# PAYMENT

---

## New Certification Payment

\$150.00 – New Certification

## Billing Email

## Total

\$150.00

Credit card and check payments will be accepted when hitting "submit payment".

[Submit Payment](#)

## IMFOA Certification Application Submission



IMFOA <certificationreview@imfoa.org>

To Trish Gleason

If there are problems with how this message is displayed, click here to view it in a web browser.

Caution! This message was sent from outside your organization. Never give your login information and password over email!

Thank you for submitting your IMFOA Certification Application. Below you will find the information submitted.

Please note: 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!

### BASIC INFORMATION

#### Name

Trish Gleason

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

tglaison

#### Title

Assistant City Clerk

#### Email

[tglaison@cityofdubuque.org](mailto:tglaison@cityofdubuque.org)

#### Municipality

Dubuque

#### City Address

50 West 13th Street  
Dubuque, Iowa 52001  
United States  
[Map It](#)

#### City Phone

## Our Iowa Municipal Finance Officers Association receipt [# 1119-7486]



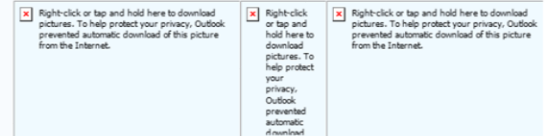
Iowa Municipal Finance Officers Association <receipts+acct\_1NsSLpEaTnif9jdm@stripe.com>

To Trish Gleason

If there are problems with how this message is displayed, click here to view it in a web browser.

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Caution! This message was sent from outside your organization. Never give your login information and password over email!



### Receipt from Iowa Municipal Finance Officers Association

Receipt #1119-7486

AMOUNT PAID	DATE PAID	PAYMENT METHOD
\$150.00	Feb 16, 2026, 7:46:53 AM	☐ - 5740

SUMMARY  
Product: \$150.00

\$150.00 × 1	\$150.00
<b>Amount paid</b>	<b>\$150.00</b>

# What happens if my application is incomplete?

The applicant is notified of the incomplete application and must submit the FULL complete application again with the required corrections made.

When paying online you must indicate that this is a resubmittal of a returned application so that you are only charged the resubmittal fee of \$35.

# Support and Resources

# IMFOA.com

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# Q&A Session