

INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS EDUCATION GUIDELINES

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PREAMBLE

The International Institute of Municipal Clerks (IIMC) serves the needs of Municipal Clerks, City Secretaries, Treasurers, Recorders, and other allied associations worldwide. IIMC's primary goals are to promote education and training, professional development, certification, public service, mutual assistance and goodwill, and skill development.

EDUCATIONAL PHILOSOPHY

The primary purpose of the International Institute of Municipal Clerks (IIMC) is to provide education and professional development programs and opportunities for its members. IIMC recognizes that education and professional development are essential to every member, and those needs are diverse worldwide. The educational philosophy of "No Clerk Left Behind" remains at the forefront as IIMC offers extensive educational programs and courses through a variety of methods, including universities and institutes, IIMC-approved institutes, state/provincial/national associations, international study, and online classes, publications, networking opportunities, 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 various professional development activities. These certifications include the Certified Municipal Clerk (CMC) designation and the Master Municipal Clerk (MMC) designation. The educational programs and certifications offered through IIMC empower its members to achieve academic and professional success.

IIMC promotes life-long learning, skill development, and public service to foster a spirit of mutual assistance and goodwill among Municipal Clerks around the globe. We continually strive to promote and lead professional and personal development practices to create opportunities for our diverse membership. In partnership with our national and international institutes and our state/local and provincial associations, we support learning opportunities that enrich our members' knowledge, skills, and abilities, thus creating pathways to certification. Certified professionals can continue their development through participation in programs offered at the state/local/provincial, and national levels even after they achieve the desired certification. This commitment to life-long learning enables the members to keep current with evolving practices in the profession and remain effective in their municipalities.

IIMC MEMBERSHIP CLASSIFICATIONS

- Full Member/Additional Full Member - Individuals who serve a legislative government body (LGB) in an administrative capacity with management responsibilities and perform at least [four of the eight core clerk duties](#). These members may earn both IIMC designations.
- Associate member* - Does not qualify for full membership and cannot become a Certified Municipal Clerk or a Master Municipal Clerk. They may, however, attend conferences and courses as they desire.
- Retired Members - These members may earn both IIMC designations.

**If a Full Member, who is fully admitted and engaged in the certification process, finds themselves unable to meet the criteria of a Full Member, they can transfer to Associate Member status. If the newly transitioned Associate Member wishes, they can continue to complete their current certification.*

Membership must be current for IIMC to recognize a Certified Municipal Clerk (CMC) or Master Municipal Clerk (MMC) designation.

CERTIFIED MUNICIPAL CLERK (CMC) DESIGNATION

The Certified Municipal Clerk program can enhance the job performance of the Clerks in small and large municipalities. To earn the CMC designation, a Municipal Clerk must attend extensive education programs, and the CMC designation also requires relevant experience in a municipality. The CMC program prepares the applicants to meet the challenges of the complex role of the Municipal Clerk by providing them with quality education in partnership with institutions of higher learning and state/provincial/national associations. The CMC program has been assisting clerks in excelling since 1970.

Members will earn all points according to the provisions of the IIMC Education Guidelines.

The following are the requirements for obtaining the CMC designation:

1. Be a Full/Additional Full/Retired Member.
2. Be an active member of IIMC for two years.
3. Complete and submit the Enrollment Form to be reviewed as an eligible CMC candidate and the full non-refundable certification fee.
4. Submit the [Application for CMC Designation](#) accompanied by supporting documentation for each item listed.
5. The CMC Designation requires sixty (60) education and fifty (50) experience points.

CMC CERTIFICATION

The Certified Municipal Clerk (CMC) is the first of two professional designations offered by IIMC. The CMC program prepares participants to meet the basic challenges of the complex role of the Municipal Clerk.

PREREQUISITES

The CMC is a prerequisite to the MMC. Points earned before achieving the CMC designation will not apply towards the MMC designation. The only exception to this rule is a college degree not previously applied.

A member may begin accruing MMC-eligible items while their CMC application is pending review. However, if the assessment determines that the member's final CMC application is deficient, the assessor will only review and apply any items accrued in the interim toward the CMC application.

Credit earned while a CMC designee awaits the fulfilment of the two-year IIMC membership requirement for receiving the CMC designation will be eligible to be reviewed for MMC credit.

CMC EDUCATION POINT REQUIREMENTS

Sixty (60) Education Points Required (Regions I-IX)

Options for obtaining the sixty (60) Education points required may come from any combination of the following categories:

| Option | Eligible Points |
|--|--|
| 1) Completion of an IIMC-approved Institute or Academy program | 1 point per 2 educational hours (120 hours = 60 points) |
| 2) A bachelor's degree or higher in Public Administration or a related field* | 20 points |
| 3) A bachelor's degree or higher in an unrelated field* | 10 points |
| 4) An associate degree | 5 points |
| 5) Completion of a State/ National/ Provincial education program approved through the IIMC course review process | 1 point per 4 educational hours with a completed learning assessment |
| 6) IIMC Annual Conference** | 1 point per 1 educational session with a completed learning assessment |
| 7) IIMC Athenian Leadership Dialogue*** | 3 points each with completed learning assessment, 18 points maximum |
| 8) IIMC Online programs | 1 point per 2 educational hours |
| 9) IIMC Study Abroad Program | Points vary by program |

* Copies of official transcripts are required.

**Members may use IIMC Annual Conference educational hours for either education or experience points.

*** Members may apply a maximum of 18 points to the CMC designation.

Excess education points will be applied to experience by the IIMC Education Department during the designation application review period.

IIMC awards at least 0.5 education points. Members must meet minimum time requirements based on the stated point conversion.

CMC EXPERIENCE POINT REQUIREMENTS

Fifty (50) Experience Points Required (Regions I-IX)

Options for obtaining the fifty (50) experience points required may come from any combination of the following categories:

| Option | Eligible Points |
|---|--|
| 1) Full-time Municipal Clerk* positions qualifying for Full/Additional Full Membership | 4 points per year**, maximum 40 points |
| 2) Part-time Municipal Clerk* positions qualifying for Full/Additional Full Membership | 2 points per year**, maximum 40 points |
| 3) Other full-time positions in local government before becoming a Municipal Clerk* | 2 points per year**, maximum 30 points |
| 4) Administrative positions in federal, state, or provincial government | 1 point per year**, maximum 30 points |
| 5) Administrative positions in business*** | 1 point per year**, maximum 30 points |
| 6) IIMC Annual Conferences**** | 1 point per 1 educational session with a completed learning assessment |
| 7) Attendance at an IIMC regional meeting, municipal clerks association conference, municipal league conference, or other municipal clerk-related conferences | 1 point per 4 verifiable hours***** or 1 day of educational attendance |
| 8) Completion of a State / National / Provincial education program approved through the IIMC Course Review Process | 1 point per 4 educational hours with a completed learning assessment |
| 9) Other applicable programs | 1 point per 6 educational hours |
| 10) IIMC Study Abroad Program | Points vary by program |
| 11) Applicable business or vocational school programs | 1 point per 10 educational hours |
| 12) Applicable college or university courses not applied toward education | 1 point per applicable credit unit |
| 13) IIMC, IIMC Foundation, or Municipal Clerks Association Committee service | 1 point per year** |

*See IIMC Membership Classifications.

**Employment and Committee service may be reviewed in six-month increments and will be re-evaluated with each application submission.

***In the case of applicable self-employment, the applicant must submit a copy of their business license and tax return for each year of employment they seek credit for in addition to a first-hand letter outlining the nature of the business and the duties performed.

****Members may use IIMC Annual Conference educational hours for either education or experience points. *****Verifiable hours are educational hours the hosting organization verifies and reflects in the supporting documentation.

Sample Course Subjects for the Certified Municipal Clerk (CMC) Program

The following is an example of course subjects for the education component of the CMC designation. It indicates the subject matters within the context of IIMC core educational requirements for the CMC designation. The courses must fulfill the requirements of the IIMC Education Guidelines.

IIMC emphasizes that, at a minimum, all courses shall be related to the job of the participating clerk and shall include a presentation by an educator with appropriate credentials or by an expert in the field. From time to time, the Education Department may update, revise, and change courses as needed.

A. Public Administration and Organization

- Introduction to Public Administration
- Public Management
- Social and Political Systems
- Local Government
- Public Organizations
- Introduction to Fiscal Management
- Accounting for Municipalities
- Budgeting for Municipalities
- Financial Management
- Introduction to Law
- Introduction to Information Technology
- Records Management I
- Records Management II
- The Planning Process
- The Municipal Clerk Profession
- Introduction to Project Management
- Meeting Administration
- Agendas and Minutes
- Administrative Law
- Environmental Policy and Management
- Public Sector Economics
- Knowledge Management
- Organizational Management
- The American Municipality

B. Social and Interpersonal Issues

- Personal and Group Behavior
- Introduction to Communication
- Written Communication I
- Written Communication II
- Presentation Skills
- Community Development
- Teambuilding and Group Dynamics
- Principles of Ethics
- Comparative Clerkship
- Leadership
- Media Relations Project Management
- Project Risk Management
- Research Skills
- Public Organizations
- Public Personnel Management
- Strategic Planning for Not-for-Profit and Government Entities
- Sustainable Economic and Community Development
- Technical Writing
- Technology in the Clerk's Office/Information management Technology

C. Electives

- Election Administration
- Emergency Management
- Employment Law/HR Management
- State Mandated Education

IIMC will also accept state—or provincial-specific education and training related to the clerk's job as an elective. In addition, IIMC will take other courses relevant to the Municipal Clerk profession and in compliance.

MASTER MUNICIPAL CLERK (MMC) DESIGNATION

The Master Municipal (MMC) is the second of two professional designations offered by IIMC. To qualify for entrance into the MMC program, an applicant must hold the CMC designation. The MMC program prepares participants to meet the challenges of the complex role of the Municipal Clerk. Through advanced continuing education programs, participants receive further development to perform more complex municipal duties. The certification requirements include an extensive and advanced educational component and a professional contribution component. MMC applicants must demonstrate their active pursuit of educational and professional activities and have remained informed of current socio-political, cultural, and economic issues that affect local governments and municipalities.

The educational requirements for the MMC are more advanced and complex than those of the CMC program. The topics and course descriptions may sound like those of the CMC courses; however, the breadth and depth of the MMC courses are more academically advanced. The IIMC Education Department is always a resource that assists in determining the education level of any course. Members must earn all points according to the provisions outlined in the requirements in this document.

The following are the requirements for obtaining the MMC designation:

1. Hold a CMC designation in good standing.
2. Be a Full/Additional Full/Retired Member
3. Complete the Application for MMC admission to determine MMC eligibility and the non-refundable certification fee.
4. Submit the Application for MMC Designation accompanied by supporting documentation for each item listed.
5. The MMC Designation requires sixty (60) advanced education and forty (40) professional contribution points.
6. IIMC DOES NOT accept any points earned or dated before the CMC designation toward the MMC in progress. For example, no materials dated before March 2008 will count toward the MMC in progress if the applicant obtained their CMC designation in March 2008. A college degree not previously applied is the only exception to this rule.

MMC ADVANCED EDUCATION POINT REQUIREMENTS

Sixty (60) Advanced Education Points Required (Regions I-IX)

Options for obtaining the sixty (60) advanced education points required may come from any combination of the following categories:

| Option | Eligible Points |
|---|--|
| 1) Completion of an IIMC-approved Academy program | 1 point per 2 educational hours (120 hours = 60 points) |
| 2) A bachelor's degree or higher in Public Administration or a related field* | 20 points |
| 3) A bachelor's degree or higher in an unrelated field* | 10 points |
| 4) An associate degree | 5 points |
| 5) Completion of a State / National / Provincial | 1 point per 4 educational hours |

| | |
|---|--|
| education program approved through the IIMC Course Review Process | with a completed learning assessment |
| 6) IIMC Annual Conference** | 1 point per 2 educational hours |
| 7) Athenian Leadership Society Dialogues*** | 3 points each with completed learning assessment, 18 points maximum |
| 8) IIMC online education programs | 1 point per 2 educational hours |
| 9) IIMC Study Abroad Program | Points vary by program |
| 10) Other applicable programs | 1 point per 6 educational hours with a completed learning assessment |

* Copies of official transcripts are required.

**Members may use IIMC Annual Conference educational hours for either education or experience points.

*** Members may apply a maximum of 18 points to the MMC designation.

The IIMC Education Department will apply excess advanced education points to professional contributions, as referenced in #5 of the MMC requirements noted above.

A member may begin accruing MMC-eligible items while their final CMC application is pending review. However, if the assessment determines that the member's CMC application is deficient, the assessor will only review and apply any items accrued in the interim toward the CMC application.

MMC PROFESSIONAL CONTRIBUTION POINT REQUIREMENTS

Forty (40) Professional Contribution Points Required (Regions I-IX)

Options for obtaining the forty (40) professional contribution points required may come from any combination of the following categories:

| Option | Eligible Points |
|---|--|
| 1) IIMC Board Member or IIMC Foundation Board of Directors | 2 points per year of service |
| 2) Chairperson of IIMC, IIMC Foundation, or Municipal Clerks Association Committee | 2 points per year of service |
| 3) An officer or trustee of a municipal clerk association or subdivision | 2 points per year of service |
| 4) IIMC Board Member, IIMC foundation, or municipal clerk association committee member | 1 point per year of service |
| 5) An officer in a related professional association | 1 point per year of service |
| 6) Attendance at an IIMC regional meeting, municipal clerk association conference, municipal league conference, or other municipal clerk-related conferences | 1 point per 4 verifiable hours* or 1 day of educational attendance |
| 7) IIMC Annual Conference** | 1 point per 1 educational session with a completed learning assessment |
| 8) Instructor, facilitator, or trainer for one of the following organizations: • An IIMC-approved Institute/Academy • A State/Provincial/National Association Education Program | Points per educational hour taught plus prep time***: |

| | |
|---|---|
| • Applicable education programs | 1 point per 2 hours 1 point per 4 hours 1 point per 6 hours |
| 9) Unique on-the-job performance or achievements outside daily duties that benefit the profession or municipality**** | 1 point per 8 hours, with a 12-point maximum |
| 10) Personal accomplishments of educational benefit to the profession | 1 point per accomplishment |
| 11) Applicable college or university courses not applied toward education ***** | 1 point per applicable credit unit |
| 12) Other applicable programs | 1 point per 6 educational hours |

*Verifiable hours are educational hours the hosting organization verifies and reflects in the supporting documentation.

** Members may use IIMC Annual Conference educational hours for either education or experience points.

***In addition to verification of the teaching time provided by the hosting organization, the time spent preparing for the presentation is eligible to be reviewed for credit. A first-hand letter outlining the preparation and the number of hours dedicated to said preparation is required.

****The municipality or organization where the service occurred must verify the unique on-the-job performance.

***** Members must complete courses after obtaining the CMC designation.

SAMPLE COURSE SUBJECTS FOR THE MUNICIPAL CLERK ACADEMY (MMC) PROGRAM

The following is an example of course subjects for the education component of the MMC designation. It indicates the subject matter required (Public Administration and elective courses) for the MMC designation. The courses must fulfill the requirements of the IIMC Education Guidelines. The educational requirements for MMC are more rigorous and much higher than those for the CMC program. The subject matters may be similar to those of the CMC courses; however, the breadth and depth of the MMC courses shall be more academically advanced.

IIMC emphasizes that, at a minimum, all courses shall be related to the job of the participating clerk and shall include a presentation by an educator with appropriate credentials or by an expert in the field. A brief bio will suffice as evidence of the appropriateness of the credentials or expertise. From time to time, the Education Department may update, revise, and change courses as needed.

A. Public Administration

- Public Administration and Society
- Environmental Policy and Management
- Local Government Administration
- Comparative Administrative Systems
- Administrative Law
- Budgeting/Accounting for Municipalities
- Public Sector Economics
- Public Financial Management I
- Public Financial Management II
- Sustainable Economic and Community Development
- The American Municipality
- Project Management I
- Project Management II
- Project Risk Management
- Technology in the Clerk's Office/Information Technology Management

- Knowledge Management
- Strategic Planning for Not-for-profit and Governmental entities
- Public Personnel Management
- Advanced Records Management
- Community Power, Leadership, and Administration
- Organizational Change in Public Service
- Technical Writing and Communication in Public Service I
- Technical Writing and Communication in Public Service II
- Ethics as Core Strategy for Social Responsibility/Values
- Advanced Agendas and Minutes
- Communication
- Community, Power, and Leadership
- Leadership, Organization, and Management
- Media Relations
- Meeting Administration
- Personal and Group Behavior
- Public Organizations
- Research Skills
- Revenue and Fiscal Management
- Strategic Planning for Not-for-Profit and Governmental Entities
- Election Administration
- Emergency Management
- Employment Law/HR Management

B. Electives

- IIMC accepts state/provincial/national specific education and training directly related to the clerk's job as electives.

CMC INTERNATIONAL EDUCATION HOUR REQUIREMENTS

One Hundred and Twenty (120) Education Hours Required (Regions X-XI)

The one hundred and twenty (120) Education hours required may come from a combination of any of the following categories:

| Option | Eligible Hours |
|---|-------------------------|
| 1) A bachelor's degree or higher in Public Administration or a related field* | 60 hours |
| 2) A bachelor's degree or higher in an unrelated field* | 10 hours |
| 3) An associate degree | 15 hours |
| 4) Completion of an International education program approved through the IIMC course review process | 10 hours |
| 5) Attendance at an Annual Conference, IIMC regional meeting, municipal clerks' association conference, municipal league conference, or other municipal clerk-related conferences | 10 hours per conference |
| 6) IIMC Approved Online programs | 5 hours (20 hours max) |
| 7) Applicable college or university course | 5 hours (20 hours max) |

| | |
|--|---------------|
| credits not applied toward a degree | |
| 8) Applicable business or vocational school programs | 5 hours (max) |

* Official transcripts are required.

Excess education points will be applied to experience by the IIMC Education Department during the designation application review period.

CMC INTERNATIONAL EXPERIENCE HOUR REQUIREMENTS

One Hundred (100) Experience Hours Required (Regions X-XI)

The one hundred (100) experience hours required may come from any combination of the following categories:

| Option | Eligible Points |
|---|------------------------------------|
| 1) Full-time Municipal Clerk* positions qualifying for Full/Additional Full Membership | 10 hours per year (40hrs. maximum) |
| 2) Part-time Municipal Clerk* positions qualifying for Full/Additional Full Membership | 2 hours per year (30 hrs. maximum) |
| 3) Other full-time positions in local government before becoming a Municipal Clerk* | 2 hours per year (30 hrs. maximum) |
| 4) Administrative positions in federal, state, or provincial government | 2 hours per year (30 hrs. maximum) |
| 5) Administrative positions in business | 2 hours (30 hrs. maximum) |
| 6) IIMC Annual Conferences | 20 hours per year |
| 7) Completion of an International education program approved through the IIMC Course Review Process | 40 hours per year |
| 8) IIMC committee member, IIMC Foundation, or Municipal Clerks Association Committee service | 6 hours per year (12 hrs. maximum) |
| 9) IIMC Athenian Leadership Dialogue | 36 hours per year |

MMC INTERNATIONAL EDUCATION HOUR REQUIREMENTS

One Hundred and Twenty (120) Education Hours Required (Regions X-XI)

The one hundred and twenty (120) Education hours required may come from a combination of any of the following categories:

| Option | Eligible Hours |
|--|-----------------------|
| 11) A bachelor's degree or higher in Public Administration or a related field* | 60 hours |
| 12) A bachelor's degree or higher in an unrelated field* | 10 hours |
| 13) An associate degree | 15 hours |
| 14) Completion of an International education program approved through the IIMC course review process | 10 hours |

| | |
|--|----------|
| 15) Attendance at an Annual Conference, IIMC regional meeting, municipal clerks' association conference, municipal league conference, or other municipal clerk-related conferences | 10 hours |
| 16) IIMC Approved Online programs | 5 hours |
| 17) Applicable college or university course credits not applied toward a degree | 5 hours |
| 18) Applicable business or vocational school programs | 5 hours |

* Official transcripts are required.

Excess education points will be applied to experience by the IIMC Education Department during the designation application review period.

MMC INTERNATIONAL PROFESSIONAL CONTRIBUTION HOUR REQUIREMENTS

Eighty (80) Professional Contribution Hours Required (Regions X-XI)

Obtaining the eighty (80) professional contribution hours required may come from a combination of any of the following categories:

| Option | Eligible Points |
|---|-----------------------------------|
| 1) Member of the IIMC Board or IIMC Foundation Board of Directors | 2 hours per year (6 hrs. maximum) |
| 2) Chairperson of IIMC, IIMC Foundation, or Municipal Clerks Association Committee | 2 hours per year of service |
| 3) An officer or trustee of a municipal clerk association or subdivision | 2 hours per year of service |
| 4) IIMC committee member, IIMC foundation, or municipal clerk association committee member | 1 hour per year of service |
| 5) An officer in a related professional association | 1 hour per year of service |
| 6) IIMC Annual Conference*** | 20 hours per year |
| 7) Instructor, facilitator, or trainer for one of the following organizations: <ul style="list-style-type: none"> • An IIMC-approved Institute/Academy • An International Association Education Program • Applicable education programs* | 20 hours per year |
| 8) Unique on-the-job performance or achievements outside daily duties that benefit the profession or municipality** | 20 hours per year |
| 9) Personal accomplishments of educational benefit to the profession | 8 hours per accomplishment |

*Verifiable hours are educational hours the hosting organization verifies and reflects in the supporting documentation.

**In addition to verification of the teaching time provided by the hosting organization, the time spent preparing for the presentation is eligible to be reviewed for credit. A first-hand letter outlining the preparation and the number of hours dedicated to said preparation is required. The municipality or organization where the service occurred must verify the unique on-the-job performance.

***With appropriate certificates of completion **except “attendance only” certificates.**

EDUCATION PLUS PROGRAM (EPP)

The Education PLUS Program is designed as an **ADDITION** to the current education programs (CMC and MMC) and is **NOT** a designation. Members **MUST** possess an MMC in good standing to apply. The EPP program requires members to commit to lifelong education. The certification requirements include an extensive and advanced educational component and a professional contribution component. EPP applicants must demonstrate their active pursuit of educational and professional activities and remain informed of current socio-political, cultural, and economic issues that affect local governments and municipalities.

The educational requirements for the EPP are advanced and complex, like those of the MMC program. The breadth and depth of the EPP courses are academically advanced. The IIMC Education Department is always a resource that assists in determining the education level of any course. Members must earn all points according to the provisions outlined in the requirements in this document.

Educational Hours Tracking System

The Education Plus Program (EPP) will use an "hour" basis tracking system rather than a "point" basis in contrast to the CMC and MMC designations. The EPP Program consists of a **two-year** scheduled enrollment cycle with 15 hours to be completed each year. The scheduled enrollment cycles begin on the first of the month and stop at the end of the scheduled month. Each cycle should contain the following:

- 4 hours – **Mandatory** ethics training - **first cycle only**
- 4 hours – **Mandatory** diversity, equity, and inclusivity training (e.g., ADA, veterans (VA), seniors, multi-generational, etc.) OR technological training – **first cycle only**
- hours of advanced education may be any combination of the below categories. The following is an example of course subjects for the education component of the EPP Program. All courses must fulfill the requirements of the IIMC Education Guidelines.

| |
|--|
| 1) IIMC Approved Academy Program |
| 2) Applicable College/University-Based Courses |
| 3) State/National/Provincial Association Programs approved with Course Review |
| 4) IIMCEducation (Annual Conference, Athenian Dialogues, Webinars, Online Learning, IIMC Symposium) |
| 5) Other Applicable Advanced Training Programs - Municipal Leadership Programs, University-based certificate programs and courses, Certified Public Manager Programs, etc. |
| 6) Elective - "community engagement" options may include writing an article for IIMC News Digest, facilitating an education session for IIMC's annual conference, Institutes, and Academies, or online professional development component * |

***Subject to approval before participation.**

The following are the requirements for enrolling in the EPP Program:

- 1) Hold an MMC designation in good standing.
- 2) Be an active Full, Additional Full, or Retired Member of IIMC.
- 3) Commit to completing 30 hours per two-year cycle (NO "saving" hours for future cycles or allocating hours before enrollment into the program).
- 4) Submit the EPP application with all supporting documents **after** completing the first 2-year cycle. Members must submit **all required documentation on the scheduled completion date**. No incremental submissions will be accepted.

CMC, MMC, AND EPP SUPPORTING DOCUMENTATION

Members must include supporting documentation with each application for each designation and the Education PLUS Program.

Supporting documentation contains:

- The name of the applicant
- The date of the work
- The title/description/or nature of the work
- The date, location, and hours of attendance
- Any other pertinent information

Examples of Acceptable Materials:

- A certificate of completion, transcript, or letter of verification from the hosting organization
- A letter of reference from the Human Resources Department verifying the duration, scope, and nature of employment/unique service.
- A certificate of attendance from a State/Provincial/National Association, complete with hours of attendance.
- A copy of official college transcripts

Note: If you need clarification on what kind of supporting documentation is acceptable, please contact the IIMC Education Department.

IIMC cannot accept the following:

- A first-person letter, except in the case outlined in these guidelines.
- A document from a relative or spouse of the applicant
- Incomplete documentation
- PowerPoint presentations, pamphlets, or workbooks

Once received, IIMC cannot send, mail, copy, or otherwise disseminate applications or supporting documentation. Members are required to keep the originals for their records and send IIMC copies.

ATHENIAN LEADERSHIP SOCIETY POLICY

Dialogues are conversations that go beyond the usual knowledge recall and application process familiar to municipal clerks in training seminars. They are unique because they explore leadership principles and practice, drawing on the insights from a book all participants have read.

Dialogues are conversations in which clerks share their experience and understanding of the author's ideas and their relevance to their public leadership role.

The premise of the Athenian Dialogue Society is that clerks are leaders in profound yet subtle ways. Leadership here differs from the transactional vending machine citizens seem to believe about public management. The participants' interest and involvement, as well as the author's specific focus and emphasis, require that the facilitator moves with purpose using the language of meaning, feeling, and power. Participants devote a full day (6 hours) to a Dialogue and experience intellectual enrichment.

Clerk leadership is more transformational. Clerks' contribution to municipal leadership changes colleagues' and citizens' perceptions of the government's role and purpose.

Athenian dialogues are IIMC programs that IIMC-approved institutes may offer state/national/provincial clerk associations. To be recognized by IIMC, all dialogues must undergo a pre-approval process with the education department.

IIMC-approved institutes and state/provincial/national associations are responsible for procuring an Athenian Dialogue. This responsibility includes hiring a facilitator and negotiating the contract, setting fees to cover costs, and marketing the dialogue. Institute directors who are approved Athenian Dialogue facilitators may contract to conduct dialogues, and participants must purchase their books. In this format, Athenian Dialogues remain an IIMC program; however, all logistics of the dialogue are the responsibility of the hosting organization.

ATHENIAN FACILITATOR FORMAT AND GUIDELINES FOR ATHENIAN DIALOGUES

Facilitators must conduct all 6-hour Athenian Dialogues live to ensure that the book's content and meaning and its key points are thoroughly dissected and discussed. All Dialogues must be pre-approved by the Education Department.

The ideal Dialogue Facilitator should comprehend and dissect the essential leadership knowledge contained in and dispersed throughout an approved book. This knowledge must then be conveyed primarily through discussion, as opposed to lecture alone, eliciting input from each participant on the relevance and applicability of the principles and skills gleaned. The facilitator must build a "bridge" between the ideas in the selected book and the leadership concepts and principles relevant to the role of a Municipal Clerk.

A Facilitator must be an excellent communicator. They should be able to listen and ask pertinent, thoughtful questions actively. They must be skilled at keeping the conversation going, able to summarize participants' unique contributions, and able to go beyond the pages of a single book to shed new light on the insights contained therein. They should be aware that some dialogues will require additional research.

Requirements for IIMC Members

- Must hold an MMC Designation in good standing
- Must be an IIMC member for at least five years
- Must complete the 6-hour mentoring program
- Must be inducted into the Athenian Leadership Society as a Fellow
- Instead of the Fellow requirement, an IIMC member who has attended a minimum of 3 Dialogues AND also meets one of the following criteria:
 - The facilitator applicant has served as an adjunct instructor, lecturer, or similar position at a college, university, or other institutions of higher learning. Such a position must be verified in writing by the college or university and submitted to IIMC during the application process.
 - The facilitator applicant has presented programs at Institutes or Academies, State/National/Provincial Association level education programs, or IIMC Annual Conferences. Such experience must be verified in writing by the Institute Director or State Association Board of Directors and submitted to IIMC during the application process.
- Must have experience facilitating or teaching adult education programs.
- Must submit the Athenian Facilitator Application form, a bio that supports the requirements, any supporting documentation showing facilitation experience, and the "Mentor-Mentee Agreement."
- Must Participate in IIMC-approved and required Athenian Facilitator Training before hosting their first dialogue.

Athenian Leadership Society Paul Craig Fellow requirements

If you are interested in becoming an Athenian Leadership Society Paul Craig Fellow, you must:

- Be an IIMC member in good standing
- Submit the Athenian Leadership Society Membership Application and the required \$15 enrollment fee to IIMC
- Complete 10 Dialogues (**participants are responsible for maintaining their attendance records**)
- Submit the Athenian Leadership Society Fellow Application and include 10 Dialogue Certificates/Transcripts
- IIMC verifies attendance and notifies applicants when inducted as a Fellow
- New Athenian Paul Craig Fellow Inductees receive recognition at the IIMC Annual Conference

Requirements for Professionals and Academics

- Working knowledge of the municipal clerk profession.
- Must understand the Athenian Dialogue program and its requirements.
- Must complete the 6-hour mentoring program.
- Must submit the Athenian Facilitator Application form, a bio that supports the requirements, any supporting documentation showing facilitation experience, and the "Mentor-Mentee Agreement."
- Must Participate in IIMC-approved and required Athenian Facilitator Training before their first dialogue.

INSTITUTE AND STATE/PROVINCIAL/NATIONAL ASSOCIATION DIALOGUES

If an Institute or Association is interested in creating a Dialogue, they must:

- Procure their facilitator at a cost negotiated between the facilitator and the hosting organization. The cost to participate can be determined by the hosting organization depending on the facilitator and room rental, keeping costs at a minimum and eliminating the 10 participants minimum required by IIMC.
- Participants must purchase their book and **read** it before attending the dialogue.
- Dialogues must be 6.0 educational hours in length.
- Seek pre-approval from IIMC for the facilitator and book if this is a new Dialogue or a new Facilitator.
 - For a new book, send the book title and author name to the Education Department for review with a brief paragraph describing how the leadership lessons within the book are related to the duties of a municipal clerk. New facilitators must go through the Facilitator application process outlined in this policy.
 - Suppose the facilitator and book are not new to the program. In that case, the hosting organization must inform IIMC of the dialogue's logistics by submitting a copy of the Dialogue registration form/flyer/brochure, the facilitator's proposed agenda, and a copy of the learning assessment tool.
- Each participant seeking IIMC education points must complete and submit an assessment. The hosting organization/facilitator will then review and distribute a certificate of completion stating the book title, date, location, and the number of points signed by either the hosting organization or facilitator. Should an attendee already hold the MMC designation or opt not to complete the assessment, a certificate of completion will still be issued as above with the statement "Attendance Only – No Learning Assessment" to replace the number of points listed. **IIMC is not responsible**

for keeping track of Dialogue attendance.

- A list of approved books is available on the IIMC website, www.iimc.com.
- Athenian Leadership Dialogues earn 3 points each with a completed assessment.

IIMC ANNUAL CONFERENCE DIALOGUES

- IIMC will procure its facilitator at a cost negotiated between the parties. Depending on the facilitator and room rental, IIMC can determine the cost of participation, which will assist in minimizing dialogue costs.
- IIMC will also select and assign books to facilitators contracted to perform the Dialogues.
- Participants must purchase their books and **read the entire book** before attending the dialogue.
- Dialogues must be 6.0 educational hours in length.
- Facilitators will rotate, with no facilitator presenting for successive years.
- IIMC members taking a Dialogue at the Annual Conference must complete an assessment to earn IIMC education points. Should an attendee already hold the MMC designation or opt not to complete the assessment, IIMC will issue proof of completion for attendance credit.
- The facilitator will review all assessments and provide IIMC with a list of attendees who satisfactorily completed them. IIMC will issue proof of attendance and points earned on the Annual Conference transcripts.
- Facilitators must send copies of their Dialogue agenda and assessment to IIMC before the Dialogue date for its permanent files and review.

VIRTUAL ATHENIAN DIALOGUES

As of May 8, 2021, the IIMC Board of Directors approved Athenian Leadership Society Dialogues conducted online indefinitely when hosted by an IIMC-approved Institute, State/Provincial/National Association, or IIMC itself. The following guidelines are for all Dialogues completed virtually:

- All Dialogues must be 6.0 educational hours; however, Virtual Dialogues may be split into alternate formats, such as two 3-hour or three 2-hour time blocks. They may also be separated over multiple days if desired.
- As with in-person dialogues, Virtual Dialogues must also be pre-approved by IIMC and follow the pre-approval process outlined above. Hosting organizations must also follow the guidelines for selecting an approved Facilitator and book.
- Hosting organizations must require a camera and microphone when utilizing an online meeting platform (such as Zoom, Go-To-Meeting, WebEx, etc.). The facilitator and participant must have a stable camera and audio connection for the entire session duration, and participants without an audio or camera connection are removable from the session.
- IIMC recommends that hosting organizations recruit a technology volunteer to handle all technical issues and work one-on-one with the participants so the facilitator may be left to focus on facilitating.
- The hosting organization determines the cost of participating in a virtual dialogue based on the Facilitator and technology expenses incurred.
- IIMC recommends limiting Virtual Dialogue attendance to 24 attendees for maximum engagement.
- Participants must purchase and read their book before attending the virtual dialogue.
- Attendee participation and engagement are required. Facilitators may utilize polling features,

breakout rooms, chat boxes, hand raising, and any other features the selected technology platform offers. Attendees must limit outside distractions to allow for an effective learning environment and be fully present during the session. IIMC recommends an executed agreement between the attendee and hosting organization/facilitator outlining expectations for the program. Failure to meet reasonable expectations will result in zero credit, and the facilitator can give credit at their discretion.

- Assessment and certificate requirements remain the same for virtual dialogues as they are for in-person dialogues. Hosting organizations and facilitators are responsible for assessment review and certificate distribution.

EDUCATIONAL PARTNERSHIPS

To achieve its educational goals, the International Institute of Municipal Clerks (IIMC) partners with over 40 universities and colleges and selects affiliates in cooperation with State/Provincial/National Associations and IIMC staff. This triangular partnership has contributed to the success and longevity of the quality of education delivered to IIMC members for many decades. IIMC combines its resources with the resources of its two partners at the local and institutional levels to achieve greater efficiency, effectiveness, and relevance for its members.

IIMC also partners with various education providers to supplement the work done by our institute and Association partners.

Each educational provider has a set of guidelines they follow when planning educational programs.

State/National/Provincial Associations

State/National/Provincial Associations can offer education programs independently from an IIMC Approved Institute. These include single-day education events and multiple-day educational conferences. Associations may also serve as the hosting organization for an IIMC Regional meeting. Association-level programming must go through the Course Review Process to be assessed for certification credit and are eligible for 1 CMC education or 1 MMC advanced education point per 4 educational hours offered.

[List of State/National/Provincial Associations](#)

IIMC Approved Institutes

An Institute is a university-based program that has undergone a rigorous pre-approval process with IIMC staff, the Education & Professional Development Committee, and the IIMC Board of Directors. These entities offer a clerk-specific curriculum and partner with the local Clerks association to offer educational opportunities relevant to CMC and MMC Designations. The CMC Institute and MMC Academy programs are eligible for 1 CMC education or 1 MMC advanced education point per 2 educational hours offered.

[List of approved Institutes](#)

Additional Educational Providers

IIMC partners with numerous organizations that offer educational opportunities relevant to the Municipal Clerk profession. The courses/programs these organizations provide, including a learning assessment, can be reviewed for 1 CMC experience or 1 MMC advanced education point per 6 educational hours. Courses/programs that do not include a learning assessment will earn 1 CMC experience or 1 MMC professional contribution point.

ADDITIONAL INFORMATION APPLICABLE TO ALL EDUCATIONAL PARTNERS

ACCEPTABLE COURSES WITH EMBEDDED TECHNOLOGY

Coursework should always be connected to the profession to support the achievement of a municipal clerk credential. Courses providing instruction on specific functions of the Municipal Clerk utilizing software as a *supplemental* tool are permitted and encouraged.

Such courses include but are not limited to:

- Budgeting, data analysis, or record-keeping with Excel as a tool to assist in creation and maintenance.
- Presentation skills utilizing PowerPoint (or similar visual presentation programs).
- Social media, using Facebook, Instagram, and LinkedIn as marketing tools.

When not incorporated into the study of its application to municipal clerk duties and responsibilities, courses focusing on a particular software or app are not permitted, nor will they count in point calculation.

Examples of unacceptable courses are but are not limited to:

- How to use Outlook, Excel, Word, vendor products, and data analytic apps
- How to send emails
- How to create spreadsheets
- Basic word processing applications
- Vendor product usage
- Creating a database

WELLNESS COURSES

Wellness content is relevant to the municipal clerk profession and a good topic for CMC and MMC credit when it relates to or enhances the profession. With a renewed focus on mindfulness, life balance, and stress reduction in the workplace, courses that assist clerks in achieving these goals are acceptable. Some courses include meditation, mindset, and creating life balance. Exercise classes, physical self-defense, martial arts, and cooking or nutrition are prohibited.

CONTACT HOUR DEFINITION

IIMC reviews clerk-related programs for credit based on in-class contact hours. In alignment with standard higher education academic policy, IIMC defines a "contact hour" as 50 minutes of instruction for every hour of the class or workshop.

The following is the board-approved scale in both the review of certification applications, IIMC-approved Institute programs, state/national/provincial educational programs, and other applicable programs:

- *1 contact hour* = 60 total minutes, which is 50 minutes of instruction, with up to 10 minutes of break time*
- *2 contact hours* = 120 total minutes, which is equal to 100 minutes of education, with up to 20 minutes of break time*
- *3 contact hours* = 180 total minutes, which is equivalent to 150 minutes of instruction, with up to 30 minutes of break time*

*NOTE: Breaks can occur in one instance, as one break, or divided into two or more intervals, depending on total contact time.

LEARNING ASSESSMENTS

IIMC requires learning assessments to accompany any program eligible for CMC education or MMC advanced education credit, including programs offered by IIMC-approved institutes and academies, state/national/provincial association programs, IIMC annual conference programs, IIMC-approved Athenian Leadership Dialogues, IIMC-approved online education programs, and other relevant education programs.

Assessments may be incorporated into the learning session or completed after the education program at the discretion of the hosting organization. The assessment tool, measuring the participants' knowledge/skills/experience, will be selected and designed by the instructors in conjunction with the hosting organization. The assessment tool may include but is not limited to a test or quiz, essay, practicum, Knowledge Transfer Action Plan, Capstone Project, or similar mechanisms.

The instructors or hosting organization will review the assessment results before a certificate of completion or supporting documentation may be awarded.

Note: Learning Assessments are not session/program evaluations.

CERTIFICATES OF COMPLETION/PROOF OF ATTENDANCE

IIMC Educational Partners are required to provide attendees with supporting documentation verifying attendance, such as a certificate of completion, transcript, verification letters, etc., after the conclusion of each program. This documentation is given only to those who have verified attendance for all sessions and completed the mandatory learning assessment.

The certificate of completion must include the following:

- Participants name
- Program/Event title
- Date of completion
- Number of hours attended
- Signature or contact information of the host representing the organization (Institute Director, Education Chair, Program Coordinator, etc.)

ONLINE LEARNING

Two distinct online learning types exist. They are online-designed courses and web-based seminars (webinars).

Online-designed Courses: A course is online when the method of instruction is delivered 100% via the Web, allowing students to interact frequently with fellow students, instructor(s), and content. These courses include an in-depth exploration of the topic and a reasonable amount of outside work. Online courses must also include a learning assessment approved by the institute director or sponsoring organization to be eligible for CMC education or MMC advanced education points. Online courses that *do not* contain a learning assessment will *only* be eligible for CMC experience or MMC professional contribution points.

Webinars: A webinar may be a workshop or class whose host facilitates the course in real time or records it for viewing later.

There are ***two*** types of online/webinar facilitation and delivery methods:

- 1) **Interactive (synchronous)** – These are real-time online courses/webinars in which participants interact with a facilitator, other participants, and content. Participants may ask questions and

participate in discussions. To be given credit by IIMC, these webinars must include a learning assessment approved by the Institute Director, Director of Professional Development, or sponsoring organization.

2) Non-Interactive (asynchronous) -These are recorded online courses/webinars in which participants view content at their own pace without real-time interaction with an instructor or participants. To receive credit from IIMC, these online courses/webinars must include a learning assessment approved by the Institute Director, Director of Professional Development, or sponsoring organization.

Members may earn all 60 CMC education points required for CMC certification through online learning (including offerings by institutes, academies, pre-approved state, provincial, or national association programs, and IIMC programs).

Members may earn all 60 advanced education points required for MMC certification through online learning (including offerings by institutes, academies, pre-approved state, provincial, or national association programs, IIMC programs, and programs from other outside entities, i.e., Fred Pryor Seminars, Career Track, National Seminar Training, Ed2Go, and FEMA).

THE COURSE REVIEW PROCESS

State/provincial/national associations and IIMC regions providing education programs or hosting an IIMC region meeting and wishing to receive education points must go through the course review process. Pre-approved courses earn 1 CMC education or 1 MMC advanced education point per 4 educational hours with a completed assessment. IIMC does not offer blanket approvals to any association or region. Each education event must be pre-approved.

IIMC does not award less than 0.5 CMC or MMC points. To meet this requirement, associations must offer a minimum of a combined 2 hours of educational content. This content can be a standalone 2-hour session or a combination of individual sessions that total 2+ hours.

MMC credit requires educational content to be at an intermediate or advanced level. The content's rigor, not the topic or title, determines the CMC and MMC coursework.

Institute programs do not require course review, and institute directors cannot "sign off" on State/Provincial/National Association programs or Region Meetings.

IIMC's website provides additional information on the course review submission process [here](#).

IIMC-APPROVED INSTITUTES

THE GUIDELINES FOR CREATING A NEW INSTITUTE

The Institute Director provides an institute program encompassing CMC and MMC programs. Creating an IIMC-approved Institute starts with the state/provincial/national association. To establish an IIMC-approved institute, each state/provincial/national association should form an education committee consisting of the following:

- At least five (5) clerks, one of whom will be the state/provincial/national education chair.
- All members of the Education Committee must be active or retired participating members of both IIMC and their State/Provincial/National Association.

- The Education Committee should have at least two (2) members who are actively pursuing their CMC designation and who will attend the institute.
- At least two (2) members pursuing their MMC designation must attend the institute.
- Institutes may recruit members from the state/provincial/national association's at-large membership who are interested in education programs.

The Education Committee seeks and obtains the sponsorship of an accredited university or an accredited four-year college, enter into an agreement in which the university or college shall sponsor and host the institute, and finally, the Dean, Associate Dean, or higher sign the agreement with the university or college and follow the Education Guidelines of IIMC in establishing and managing the institute. The signing and execution of the contract are a part of the prerequisites for IIMC approval of the institute and its programs. Part of the agreement includes selecting an institute director.

According to the university sponsorship agreement, the Institute Director shall be the university's representative in executing that agreement and shall serve as the institute's educational and administrative leader. University sponsorship is of paramount importance to the partnership. Only accredited universities and four-year colleges sponsor, administer, and conduct certification for IIMC-approved institutes.

Higher learning institutions' full faith and reputation must support the profession's credentials. Universities and colleges provide independent environments that ensure program quality and stability, research capabilities, and the educational resources and support needed to deliver a first-rate education.

The State/Provincial/National Education Committee and the Institute Director shall jointly write a comprehensive proposal based on the requirements of the IIMC Education Guidelines. The proposal will encompass the institute's structure, mission, goals and objectives, and educational programs. The Institute Director shall serve as the point person in writing the proposal for creating an Institute as stipulated by the IIMC Education Guidelines.

Proposal Requirements

The state/provincial/national education committee and the Institute Director who wishes to form a new institute shall write a proposal, which shall include the following:

1. Executive Summary
2. Introduction and Mission
3. Institute Purpose and Goals
4. Include a copy of an agreement of sponsorship with an accredited university or an accredited four-year college in which the university or college agrees to design, deliver, and manage all aspects of the institute and its programs according to the IIMC Education Guidelines. A university official at the level of Dean or higher shall sign this agreement.
5. Include a brief bio of the institute director
6. Include a list of instructors and their areas of expertise
7. List the Institute's Programs
8. Program Description
9. Program Objectives
10. Program Outcomes
11. A copy of the Program Assessment Method. IIMC requires assessments for all institute and academy programs. Assessments include essays, quizzes, short-answer questions, KTAP, etc.
12. Teaching and Learning Methods
13. A Copy of the Teaching and Course Evaluation Forms
14. Program Schedule and Arrangements
15. Proposed Curricula for the Institute Programs
16. Curriculum Schedule Year-by-Year for Each Program
17. List of host organizations

18. Include a copy of the proposed CMC institute and MMC academy certificates (must include the number of institute/academy hours).
19. Include a copy of the institute budget report or a statement of the financial health of the institute (a letter from the institute director/state education chair attesting to the economic well-being of the institute will suffice)
20. Include supplementary materials, program descriptions, and other supporting documentation the association or institution believes will strengthen the application and enhance the program's quality and value to Municipal Clerks. IIMC may request a sample proposal

The Institute Director must submit the proposal, a filing fee of \$300, and a cover letter to the Director of Professional Development for review and approval. The Director of Professional Development will notify the State/Provincial/National Education Committee Chair, the Education and Professional Development Committee, and the Regional Director (s) of the results. If deficiencies or more information are needed, the Director of Professional Development will address them with the state/provincial/national institute director.

UNSPONSORED INSTITUTES/COMMUNITY COLLEGES

Only accredited colleges or universities sponsor all institutes as of January 1, 2004, with limited exceptions.

An accredited community college may only be approached as a potential partner if the state/provincial/national association has exhausted all options to partner with an accredited 4-year college, university, or other approved IIMC Institute. To be considered a joint institute, it must be IIMC-approved, be reasonably close, and offer convenient travel options to clerks in the state without an institute.

State/Provincial/National Associations will be required to provide IIMC's Director of Professional Development with the following information for review and consideration:

- A document that chronologically details the steps taken to partner with other approved IIMC state institutes and justification as to why this is not a viable option.
- A letter stating the details of the journey to obtain sponsorship and justification for partnering with a community college.
- Documentation of unsuccessful partnership attempts with multiple 4-year colleges or universities within their state or province if more than one 4-year college or university exists. Examples of this documentation may include but are not limited to the dissolution of existing sponsorship agreements or letters or emails of denial and rejected RFPs.
- A letter from the potential sponsoring community college detailing the terms of sponsorship might include financial and administrative support as well as possible revenue expectations.

Once approved, a review of the Community Colleges partnership must occur after three but at most five years. The review must include attempts to re-engage with an accredited 4-year college or university or with other approved IIMC Institutes. The state/provincial/national association must submit all documentation detailing the course of action to IIMC's Director of Professional Development.

IIMC decides on sponsorship and presents the decision to the Board of Directors after reviewing all materials.

CHANGE OF UNIVERSITY SPONSORSHIP

IIMC requires a new program proposal when a college/university sponsorship or affiliation change occurs, and there is a filing fee for this.

INSTITUTE DIRECTOR

An Institute program is a program that the institute director solely provides, and it encompasses both the CMC and MMC programs. Once the Institute Director has collaborated with the State/Provincial/National Education Committee regarding possible topics and speakers, they are responsible for all aspects of the Institute program (selection of topics and speakers, contracts, fees, etc.).

If replacing the institute director, the state/provincial/national association education chair shall send IIMC the bio and contact information of their replacement no later than two months from the appointment date.

INSTITUTE ANNUAL REPORT REQUIREMENTS

Each year, institutes are required to submit the following information in the form of an Annual Report to the IIMC Director of Professional Development. The Annual Report assists IIMC's Education Department in maintaining a record of education courses and future education on the horizon. It provides quality assurance and enables IIMC to identify changes, if any. The annual report helps ensure members receive the best in education.

The annual report is due to the director of professional development via email by December 31 each year. Please visit <https://www.iimc.com/146/IIMC-Approved-Institutes> to learn more about this process. IIMC also recommends the Institute Director send a copy of this report to the State/Provincial/National Education Chair and their Regional Director (s) for their review.

The report should include the following:

1. A brief cover letter explaining an evaluation of the programs, areas needing improvement, and future educational offerings.
2. Titles, descriptions, and schedules of CMC and MMC courses offered (an institute brochure providing this same information is sufficient).
3. Institute and Academy level courses should be distinguished and identified.

The Institute Director will forward the Annual Report to the Education Department for review and comments. IIMC will review it to confirm compliance with the IIMC Education Guidelines and the requirements regarding the level and rigor of courses (CMC versus MMC).

NONCOMPLIANCE

The Director of Professional Development may determine that an Institute's course offerings for CMC designation or MMC designation are not in compliance with the provisions of the IIMC Education Guidelines. The following steps will take place:

1. The Director of Professional Development will bring the noncompliance issue to the attention of the Institute Director and collaboratively work toward a solution.
2. The Director of Professional Development will resolve the issue of noncompliance regarding the institute director within 30 days by contacting the executive director, state/provincial/national education chair, and regional directors.
3. A teleconference occurs with the Director of Professional Development, Executive Director, Institute Director(s), State/Provincial/National President and Education Chair(s), Institute Director Liaisons, and Board Liaisons of the Education and Professional Development Committee for noncompliance. If still unresolved, The Director of Professional Development will conduct a second teleconference with the same parties, and the Director of Professional Development shall schedule such teleconferences.

If unresolved within thirty days of the second teleconference, the Director of Professional Development will make a judgment regarding the extent of noncompliance and the appropriate course of action and inform the Institute Director and the State/Provincial/National_Education Chair. The written communication from the Director of Professional Development shall specify the nature of noncompliance with the Education Guidelines and offer recommendations to bring the institute into compliance.

The Institute Director, in collaboration with the State/Provincial/National Education Chair(s) and Regional Director(s), may respond to the decision by contacting the Director of Professional Development in writing. Continued noncompliance may result in revoking the institute's approval by the Director of Professional Development.