

ILLINOIS MUNICIPAL TREASURER'S ASSOCIATION

PROFESSIONAL CERTIFICATION PROGRAM Application for Re-Certification

Applicant _____

Municipality Address _____

Title _____

Phone () _____ Date of Last Certification _____

RE-CERTIFICATION RECAP	
	Points
Education Points (maximum 50)	
Experience & Participation Points	
TOTAL POINTS (minimum 85 points)	

APPLICATION CHECKLIST

- All relevant portions of the application have been completed.
- Supporting proof and documents have been attached.
- Application has been signed and dated.
- Fee of \$20.00 for bar plate or \$55.00 for new plaque. IMTA will send you an invoice for the application fee once your application is received.
- Email application to: info@imtausa.com.

Note: Application must be received by the Certification Chair by January 31st in order to have certification presented at the next IMTA Annual Conference.

COMMITTEE USE ONLY		
	Initials	Date
Certification Committee (Approved)(Denied)		
Bar Plate or Plaque Ordered		
Letter of Confirmation Sent		

CONTINUING EDUCATION REQUIREMENTS – maximum 50 points

Attendance at Illinois Municipal Treasurer’s Institute Professional Certification Classes

To earn 50 continuing education credits for Institute attendance, you must accumulate 45 credit hours of study (within the five-year time limitation) **in any combination from the following list:**

Full Phase = 33 credit hours Advanced (8) = 8 credit hours
 Advanced (16) = 16 credit hours

Examples:	
2 Full Phases = 66 credit hrs	3 Advanced (16) = 48 credit hrs
1 Full Phase & 2 Advanced (8) = 49 credit hrs	1 Full Phase & 1 Advanced (16) = 49 credit hrs
2 Advanced (16) & 2 Advanced (8) = 48 credit hrs	

<u>Phase/Session</u>	<u>Date of Attendance</u>	<u>Credit Hours</u>	<u>Total</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
<i>(MUST ENCLOSE PROOF)</i>			_____ *

* If this total equals or exceeds 45 credit hours, please record 50 points on the Grand Total line below.

Relevant university or college credited courses and/or correspondence courses – maximum 25 points
Not available to applicants who have received a University Degree (in any field).

<u>Name of Institution</u>	<u>Course Title</u>	<u>Credit Hours</u>	<u>Points</u>	<u>Total</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
<i>(MUST ENCLOSE PROOF)</i>				_____

GRAND TOTAL OF CONTINUING EDUCATION POINTS

(maximum 50 points) _____

(Transfer this total to Page One of the Application)

EXPERIENCE & PARTICIPATION REQUIREMENTS

Service as a Municipal Treasurer, Deputy Treasurer, Finance Administrator, or in a similarly responsible position:

<u>Municipality</u>	<u>Position Held</u>	<u>Dates</u>	<u>Points</u>	<u>Total</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

(Must enclose a certified letter from the Clerk of any/all Municipalities)

Association Service:

<u>Illinois MTA (Office Held, Committee Assignment, Etc.)</u>	<u>Dates</u>	<u>Points</u>	<u>Total</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

<u>APT US & C (Office Held, Committee Assignment, Etc.)</u>	<u>Dates</u>	<u>Points</u>	<u>Total</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Conferences, Meetings and Seminars:

<u>Illinois MTA</u>	<u>Dates</u>	<u>Points</u>	<u>Total</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

(MUST ENCLOSE PROOF)

EXPERIENCE & PARTICIPATION REQUIREMENTS (con't)

Conference, Meetings and Seminars:

<u>APT US & C</u>	<u>Dates</u>	<u>Points</u>	<u>Total</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

(MUST ENCLOSE PROOF)

Conference, Meetings and Seminars:

<u>OTHER (SCICTA, State Treasurer, Newly Elected Officials)</u>	<u>Dates</u>	<u>Points</u>	<u>Total</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

(MUST ENCLOSE PROOF)

MEMBERSHIP REQUIREMENTS

Points Total

One year membership spans June - May

Date of enrollment in Illinois MTA _____	_____	_____
Date of enrollment in APT US & C _____	_____	_____

(MUST ENCLOSE PROOF)

GRAND TOTAL OF EXPERIENCE & PARTICIPATION POINTS _____

(Transfer this total to page one of the application)

**IF YOU WERE RE-CERTIFIED BEFORE AND HAVE A PREVIOUS YEAR NUMBER PLATE,
SO A CORRECT COLOR & SIZE CAN MATCH**

A) WHAT COLOR IS IT _____

B) WHAT SIZE IS IT _____

I hereby certify that I have been an active member of the Illinois Municipal Treasurer's Association for the period indicated, believe in and practice the APT US & C Code of Ethics (as adopted), and serve in a qualified position with an Illinois municipality or district. The information provided in this application is true and correct to the best of my knowledge and belief, and I grant the IMTA permission to verify the accuracy of the statements and enclosures.

Signature _____

Date _____

APPLICATION DEADLINE – JANUARY 31
CIMT designations formally announced at the IMTA Annual Conference

ILLINOIS MUNICIPAL TREASURER'S ASSOCIATION

PROFESSIONAL CERTIFICATION PROGRAM

The Professional Certification Program of the Illinois Municipal Treasurer's Association was established in 1983. It is designed to advance the professionalism and professional standing of the municipal treasurer.

The Certification Program provides the Illinois Municipal Treasurers a means of keeping abreast of changes affecting their important and increasingly difficult role in municipal government.

Certification reflects that the treasurer is capable of developing and maintaining a high level of administrative and functional expertise.

The Certification Program establishes standards that recognize the professional achievements of the treasurer and provides a system through which the required standards can be met. Upon completion of these standards, the applicant is recognized as a Certified Illinois Municipal Treasurer (CIMT).

ELIGIBILITY

Each applicant for CIMT re-certification must meet the following General Standards:

1. The candidate must be currently serving as an elected or an appointed municipal treasurer, deputy or assistant treasurer, or other municipal officer charged with the performance or supervision of treasury responsibilities as defined in IMTA Constitution.
2. The candidate must be a member in good standing (with all dues paid) of the Illinois Municipal Treasurer's Association (a) since the last certification, (b) at the time of application, and (c) at the time of approval.
3. Believe in and practice the Code of Ethics of the Association of Public Treasurer's of the United States and Canada (as adopted).
4. Accumulate a minimum of 50 Continuing Education points and 35 Experience and Participation points as specified in the schedule of points.
5. Submit the approved application form, along with all required documentation and fee, to the Chairs of the IMTA Certification Committee.

APPLICATION FEE

The appropriate fee shall accompany the CIMT application. The fee is not refundable. If the application is not approved, the fee will be applicable only to reapplication.

APPLICATION DEADLINE

Although applications may be requested from the Chair of the Certification Committee at any time during the year, in order for the applicant to receive their certification at the next IMTA Annual Conference, all required application forms, documentation and fees must be **received** by the Chair of the IMTA Certification Committee no later than **January 31**.

ADMINISTRATION OF PROGRAM

The Professional Certification Program is administered by the Certification Committee. The committee considers each application for the CIMT award, and recommends the approved applicant to the IMTA Board of Directors for final approval.

Certifications expire **within** five years unless an Application to Maintain Certification is submitted by the recipient and is approved by the Certification Committee and the IMTA Board of Directors. For example, if you receive your original Certification in June of 2014, you must apply for re-certification by January 31, 2019 (which means that the last institute you could attend to receive points toward your re-certification would be the Fall of 2018).

If the Certification lapses, the applicant may request a one year extension from the Certification Committee. The Certification Committee will consider applicant requests for extensions on a case-by-case basis. If the committee does not approve the extension, the applicant must start the process over and re-apply as a new applicant. Attendance at all events must have occurred within the applicable five or six years prior to the application.

APPEALS

A candidate whose application is not approved by the Certification Committee shall be notified in writing by the Chair. The candidate may appeal the committee's decision within thirty days after receiving notice of non-approval. The appeal must be made in writing to the Chair at the appropriate address. The Chair shall submit the appeal to the Board of Directors for final decision.

PRESENTATION OF CERTIFICATION

The CIMT award will be presented to the approved applicant at the next IMTA Annual Conference. If requested by the recipient, notification by the IMTA Public Relations Chair will be provided to the recipient's municipality and local media.

The applicant is encouraged to attend the conference and receive their award in person.

DESIGNATION OF PROFESSIONAL TITLE

The professional title awarded by this program is Certified Illinois Municipal Treasurer. The initials CIMT can be used after the name of the certified individual. CIMT should have no periods between the letters.

SECTION I – EDUCATION STANDARDS

50 points toward certification must be earned from the following Education Standards

- Attendance at Illinois Municipal Treasurer’s Institute Professional Certification Classes

To earn 50 continuing education credits for Institute attendance, you must accumulate 45 credit hours of study (within the five-year time limitation) **in any combination from the following list:**

Full Phase = 33 credit hours

Advanced (8) = 8 credit hours

Advanced (16) = 16 credit hours

Examples:

2 Full Phases = 66 credit hrs

1 Full Phase & 2 Advanced (8) = 49 credit hrs

2 Advanced (16) & 2 Advanced (8) = 48 credit hrs

3 Advanced (16) = 48 credit hrs

1 Full Phase & 1 Advanced (16) = 49 credit hrs

- Relevant university or college credited courses and/or correspondence courses approved by the Certification Committee. $\frac{1}{2}$ point per credit hour - maximum 25 points

Courses must be related to accounting, finance, public administration, or a related field. Courses must be completed with a “C” grade or better and must have been taken within the five years prior to application.

SECTION II – EXPERIENCE & PARTICIPATION STANDARDS

A minimum of 35 points toward certification must be earned from the following Experience and Professional Membership standards.

	Points	Maximum
IMTA		
• Service to an Illinois Municipality as a Treasurer, or in a similarly responsible position	3/yr.	15
• Attendance at an IMTA Annual Meeting	5/yr.	20
• Attendance at an IMTA sponsored Regional Meeting	2/mtg.	10
• Organizing a Regional Meeting	2/mtg.	10
• Presenter at a Regional Meeting	2/mtg.	10
• Attendance at an IMTA Fall Meeting during IML (Chicago)	2/yr.	10
• Attendance at an IMTA Roundtable Meeting	1/mtg.	2/yr. 8/Certification
• Organizing an IMTA Roundtable Meeting	2/mtg.	4/yr 8/Certification
• Service to the IMTA in an elected position	5/yr.	20
• Presenter at IMTA/APT training session (agenda/scheduled required)	2/session	2/yr & 10 max
• Service to the IMTA on a committee <i>(Service includes any IMTA committee as either a member or chair)</i>	3/yr.	12
• Serving as an IMTA booth representative at the Fall Meeting during the IML Conference	1/hr.	8
APT US&C		
• Attendance at a APT US&C Annual Conference	3/yr.	12
• Service to the APT US&C in an elected position	2/yr.	10
• Service to the APT US&C on a committee <i>(Service includes any APT US&C committee as either a member or chair)</i>	2/yr.	10

Revised June, 2019

SECTION II – EXPERIENCE & PARTICIPATION STANDARDS (con’t)

	Points	Maximum
RELATED ASSOCIATIONS		
<ul style="list-style-type: none"> Organizing a Southeast Central Illinois Clerks-Treasurers Association Meeting 	2/mtg.	10
<ul style="list-style-type: none"> Attendance at a Southeast Central Illinois Clerks-Treasurers Association Meeting 	2/mtg.	10
<ul style="list-style-type: none"> Attendance at the Newly-Elected Officials Conference <i>(In association with IML)</i> 	2/mtg.	2
Attendance at IL Dept. of Revenue Workshop (Half-Day = 1 pt) Day	2/mtg.	2/yr & 8 Max
<ul style="list-style-type: none"> Current certification in a National professional achievement program related to treasury management, finance or public administration such as CCM (Certified Cash Manager) or CPA (Certified Public Accountant). <i>(Proof of current license <u>must</u> be provided)</i> 	5 mtg.	5

MEMBERSHIPS

- | | | |
|--|-------|---|
| <ul style="list-style-type: none"> Membership in the Illinois MTA | 1/yr. | 5 |
| <ul style="list-style-type: none"> Membership in the APT US&C | 1/yr. | 5 |

(A letter from the membership chair of each association verifying membership must accompany application)

NOTE: All Section II Experience & Professional Membership requirements must have occurred in the five years prior to the date of application.

Joint Conferences (IML/IMTA, APT/IMTA, IDOR/IMTA...) points are awarded for one event only.