



City Clerks & Municipal
Finance Officers Association

CCMFOA Association Support Overview

March 12, 2024

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Overview

City Clerks and Municipal Finance Officers Association (CCMFOA) as over 400 members and has expanded their member benefits and professional development offerings to address needs from across the state. CCMFOA is a collaborative network of professionals who deliver varied services. CCMFOA's executive board, 11 committees, and membership, are very engaged and committed to enhancing the CCMFOA member experience. The executive board and all committee members donate their time to CCFMOA while working as clerks, assistant/deputy clerks, and staff in various departments for cities across Kansas.

These are high-demand positions that assume varied duties as needed by their organization. The CCMFOA board continues to evaluate what support services would be needed to sustain the organization as it grows. CCMFOA partnered with Wichita State University's Public Policy and Management Center to ensure member services were provided and participants in professional development offerings received certification by managing accreditation aspects with IIMC.

Through this partnership, Paula Downs serves as the Education Director for CCMFOA. In addition, CCMFOA is supported by Laura Baxter, Briaja Tucker, Sarah Shaffer, Christian Holley, and Monica Salmeron who provide professional services for the Association. The PPMC has a long partnership with CCMFOA and has been delivering planning and development services for the CCMFOA Institute, Academy, Annual Conference, and other professional development opportunities for over 30 years.

The PPMC has provided board support, financial management, membership development, and operational support for the Association since 2022. This partnership allows CCMFOA board and committee members to engage in planning and development while the PPMC provides delivery and support services. The PPMC responds to the needs of CCMFOA to support member engagement.

CCMFOA's focus is to build the profession and provide professional development opportunities which is critical to the profession and public service. The PPMC and CCMFOA contract prior to 2022 included the PPMC's personnel costs and shared revenue from each professional development offering. The 2022 – 2024 contract transitioned to the PPMC receiving personnel costs only. All profit is provided to CCMFOA to be used to enhance the association. The contract clearly identifies CCMFOA's financial responsibility to the PPMC.

The PPMC provides planning, logistics and “back-of-house” services, while the board and committee members are able to engage and network with members, sponsors, and partners.

Spring Conference

PPMC plans and delivers professional development topics across 2.5 days with approximately 15 contact hours. Credit hours are delivered in accordance with IIMC standards for accreditation.

1. Designing, developing, evaluating, and managing professional development offerings in consultation with the CCMFOA Board.
2. Preparing an annual budget for professional development offerings and once adopted by the CCMFOA Board, implement professional development offerings within the authorized budget.
3. Performing meeting planning and overseeing professional development offerings, including:
 - Marketing events through printed materials, electronic communications, and press releases as necessary.
 - Researching, recommending, and negotiating agreements for event venues and entertainment.
 - Recruiting and negotiating agreements with speakers and overseeing lodging and transportation of speakers, as necessary.
 - Creating banquet event orders, as necessary, for meals, refreshments, rooms, and room staging.
 - Reserving audio-visual equipment.
 - Overseeing events on site.
4. Performing financial management and reporting in connection with professional development offerings, including:
 - Invoicing participants, collecting fees, and authorizing and arranging refunds as necessary.
 - Executing all expenditures.
 - Accounting for revenues collected and disbursement of funds.
 - Reporting on revenues, expenditures, and balances by program.

5. Offering and performing all administrative support for professional development offerings, including:
 - Registering participants.
 - Preparing regular and electronic mailing lists, participant lists, name badges, table-top cards, handouts, participant packets, room signs, certificates of completion, and speaker confirmation and thank you letters.
 - Ordering amenities for meeting participants and speakers as necessary.
 - Providing on-site check-in assistance to meeting participants.
 - Ordering all necessary supplies.
6. Developing all professional development contracts and agreements.
7. Maintaining professional development records.
8. Responding to attendee questions.

Spring Conference Contract Amounts

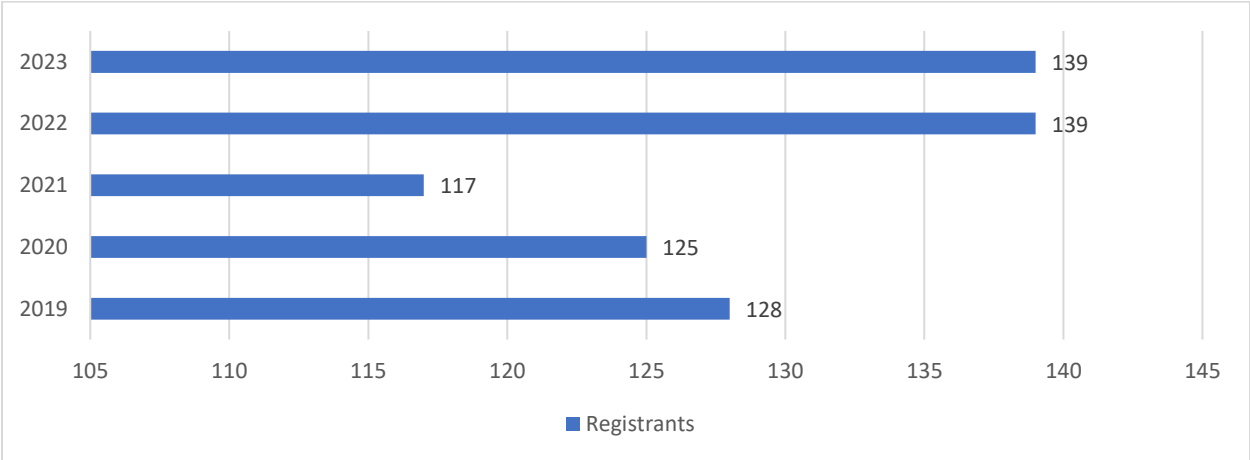
2022 Contract Amount: \$13,300.00

2023 Contract Amount: (2022 + 4% increase): \$13,832.00

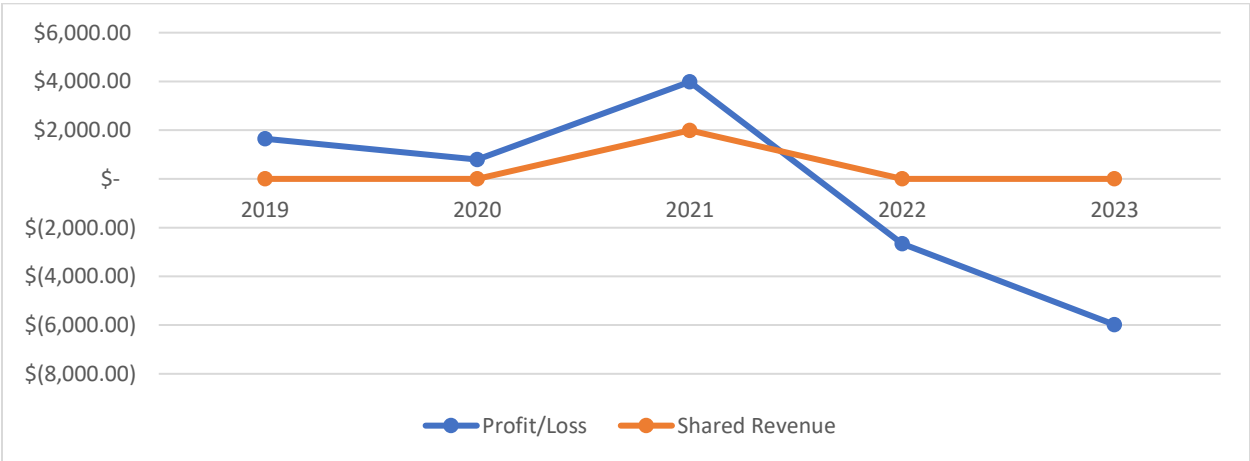
2024 Contract Amount: (2023 + 4% increase): \$14,385.28

Spring Conference Data

Attendees by Year



Profit by Year



Participants Average Ratings

Overall Event Satisfaction Rating Average: 89%

Overall Speaker Satisfaction Rating Average: 85%

Spring Conference Vendor Fair Logistics (2024)

General Responsibilities

1. WSU will designate a program manager to perform vendor/sponsor management responsibilities.
2. Design, develop, evaluate, and manage vendor/sponsor services in consultation with the CCMFOA Board.
3. Ensure vendor tables are ordered through the hotel event information.
4. Respond to vendor/sponsor questions regarding general conference information and vendor/sponsor benefits.
5. Collect vendor logos for use list on the conference website, WHOVA, and in conference materials.

Marketing

1. Develop and send out vendor/sponsor registration invitations, including regular reminder registration emails.
2. Utilize CCMFOA vendor/sponsor listserv for registration.
3. Prepare and send out an electronic “save the date” to vendors/sponsors.
4. Provide vendor/sponsor benefit information and registration links on CCMFOA website.
 - Update and send out the vendor/sponsor packet information that includes correct year, key deadlines, and CCMFOA contact information.
5. Provide table tent labels for tables for sponsors/vendors to easily identify their location.
6. Update sponsor/vendor list with updated information and new sponsor/vendors
 - Provide vendors/sponsors with conference registration information; hotel registration and block code information; WHOVA link information; prepare nametags; and make arrangements for electricity needs.

Vendor/Sponsor On-Site Support

1. Provide vendor booth map for location assignments.
2. Provide onsite support to vendors.

Vendor Contract Addendum

2024 PPMC Contract Addendum Amount: \$896.00

Vendor Fair Statistics 2024

- Sponsor/Vendors = 41
- Fees = \$28,600

CCMFOA Institute

PPMC delivers 120 contact hours for approximately 100 participants completing in person and on-demand requirements in accordance with accreditation requirements from the International Institute of Municipal Clerks (IIMC) and developed in collaboration with CCMFOA.

1. Designing, developing, evaluating, and managing professional development offerings in consultation with the CCMFOA Board.
2. Preparing an annual budget for professional development offerings and once adopted by the CCMFOA Board, implement professional development offerings within authorized budget.
3. Performing meeting planning and oversee professional development offerings, including:
 - Marketing events through printed materials, electronic communications, and press releases as necessary.
 - Researching, recommending, and negotiating agreements for event venues and entertainment.
 - Recruiting and negotiating agreements with speakers and overseeing lodging and transportation of speakers, as necessary.
 - Creating banquet event orders, as necessary, for meals, refreshments, rooms, and room staging.
 - Reserving audio-visual equipment.
 - Overseeing events on site.
4. Performing financial management and reporting in connection with professional development offerings, including:
 - Invoicing participants, collecting fees, and authorizing and arranging refunds as necessary.
 - Executing all expenditures.
 - Accounting for revenues collected and disbursement of funds.

- Reporting on revenues, expenditures, and balances by program offering, and performing all administrative support for professional development offerings, including:
 - Registering participant.
 - Preparing regular and electronic mailing lists, participant lists, name badges, table-top cards, handouts, participant packets, room signs, certificates of completion, and speaker confirmation and thank you letters.
 - Ordering amenities for meeting participants and speakers as necessary.
 - Providing on-site check-in assistance to meeting participants.
 - Ordering all necessary supplies.
- 5. Developing all professional development contracts and agreements.
- 6. Maintaining professional development records.
- 7. Responding to attendee questions.

CCMFOA Institute Contract Amounts

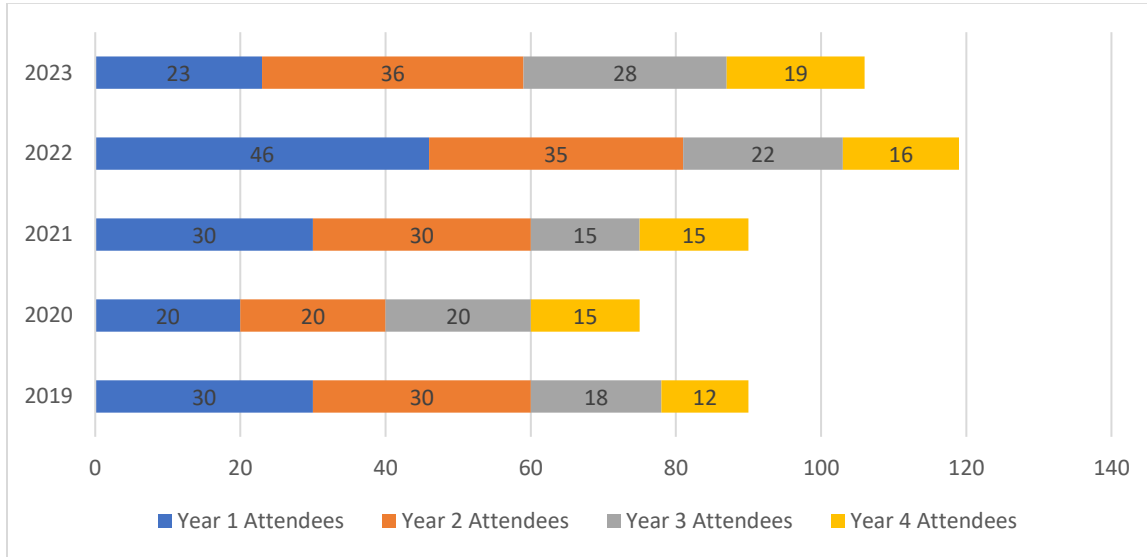
2022 Contract Amount: \$17,650

2023 Contract Amount: (2022 + 4% increase): \$18,356.00

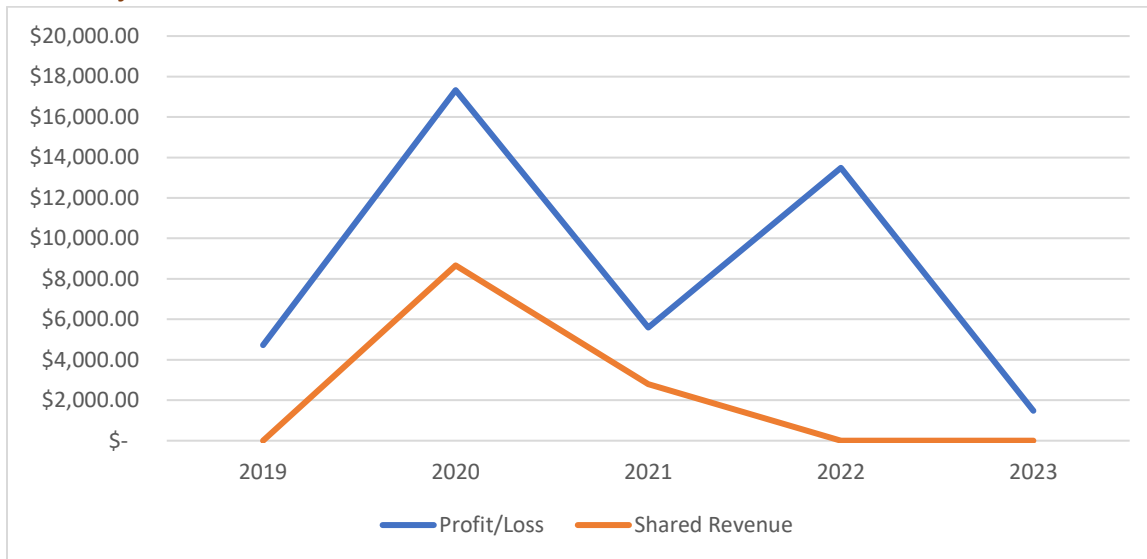
2024 Contract Amount: (2023 + 4% increase): \$19,090.24

CCMFOA Institute Data

Attendees by Year



Profit by Year



Participants Average Rating

Overall Event Satisfaction Rating Average: 89.5%

CCMFOA Academy

PPMC delivers 12 hours of programming to approximately 40 participants who complete in person and on demand requirements in accordance with accreditation requirements from the International Institute of Municipal Clerks (IIMC) and developed in collaboration with CCMFOA.

1. Designing, developing, evaluating, and managing professional development offerings in consultation with the CCMFOA Board.
2. Preparing an annual budget for professional development offerings and once adopted by the CCMFOA Board, implement professional development offerings within authorized budget.
3. Performing meeting planning and oversee professional development offerings, including:
 - Marketing events through printed materials, electronic communications, and press releases as necessary.
 - Researching, recommending, and negotiating agreements for event venues and entertainment.
 - Recruiting and negotiating agreements with speakers and overseeing lodging and transportation of speakers, as necessary.
 - Creating banquet event orders, as necessary, for meals, refreshments, rooms, and room staging.
 - Reserving audio-visual equipment.
 - Overseeing events on site.
4. Performing financial management and reporting in connection with professional development offerings, including:
 - Invoicing participants, collecting fees, and authorizing and arranging refunds as necessary.
 - Executing all expenditures.
 - Accounting for revenues collected and disbursement of funds.

- Reporting on revenues, expenditures, and balances by program offering, and performing all administrative support for professional development offerings, including:
 - Registering participants.
 - Preparing regular and electronic mailing lists, participant lists, name badges, table-top cards, handouts, participant packets, room signs, certificates of completion, and speaker confirmation and thank you letters.
 - Ordering amenities for meeting participants and speakers as necessary.
 - Providing on-site check-in assistance to meeting participants.
 - Ordering all necessary supplies.
- 5. Developing all professional development contracts and agreements.
- 6. Maintaining professional development records.
- 7. Responding to attendee questions.

CCMFOA Academy Contract Amounts

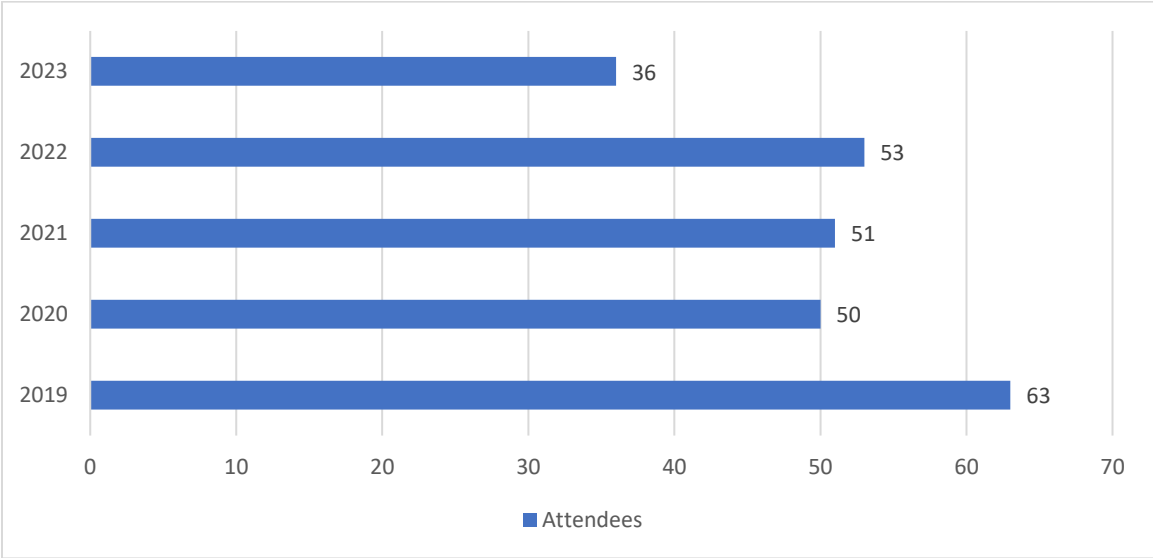
2022 Contract Amount: \$10,865

2023 Contract Amount: (2022 + 4% increase): \$11,299.60

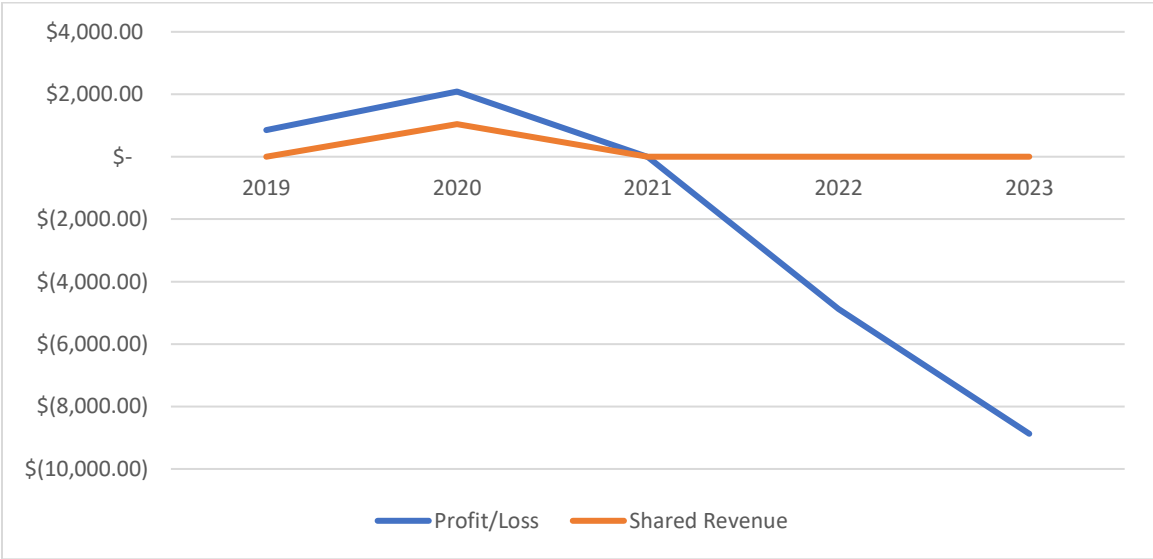
2024 Contract Amount : (2023 + 4% increase): \$11,751.58

CCMFOA Academy Data

Attendees by year



Profit by year



Ratings by year

Overall Event Satisfaction Rating Average: 86%

Virtual Education Series

PPMC plans and delivers four 1-hour virtual education sessions around topics of interest to clerks across the state. Topics and speakers are determined in collaboration with CCMFOA.

1. Designing, developing, and managing virtual education in consultation with the CCMFOA Board.
2. Develop virtual offerings including:
 - Marketing events through electronic communications.
 - Recruiting speakers.
 - Setting up electronic links.
 - Providing session support around technology, chat, and recording of session.
3. Performing administrative support, including:
 - Registering participants.
 - Preparing regular and electronic mailing lists and participant lists.
 - Providing certificates of completion.
4. Maintaining professional development records
5. Responding to attendee questions

Virtual Education Series Contract

2022 Contract Amount: \$5,100 (\$2550 original contract for 4 sessions + \$2,550 for 4 additional sessions via a contract addendum)

2023 Contract Amount (2022 + 4% increase): \$5,304

2024 Contract Amount (\$2550 + 4% increase): \$2,652

Athenian Dialogue

PPMC collaborates with CCMFOA to identify a speaker and book topic during the summer of each year. Session is offered in-person with online participants.

1. Designing, developing, evaluating, and managing professional development offerings in consultation with the CCMFOA Board.
2. Preparing an annual budget for professional development offerings and once adopted by the CCMFOA Board, implement professional development offerings within authorized budget.
3. Performing meeting planning and oversee professional development offerings, including:
 - Marketing events through printed materials and electronic communications.
 - Researching, recommending, and negotiating agreements for event venues.
 - Recruiting and negotiating agreements with speakers and overseeing lodging and transportation of speakers, as necessary.
 - Creating banquet event orders, as necessary, for meals, refreshments, rooms, and room staging.
 - Reserving audio-visual equipment.
 - Overseeing events on site.
4. Performing financial management and reporting in connection with professional development offerings, including:
 - Invoicing participants, collecting fees, and authorizing and arranging refunds as necessary.
 - Executing all expenditures.
 - Accounting for revenues collected and disbursement of funds.
 - Reporting on revenues, expenditures, and balances by program offering.

5. Performing all administrative support for professional development offerings, including:
 - Registering participants.
 - Preparing regular and electronic mailing lists, participant lists, name badges, participant packets, certificates of completion, and speaker confirmation and thank you letters.
 - Providing on-site check-in assistance to meeting participants
 - Ordering all necessary supplies.
 - Setting up electronic links.
6. Developing all professional development contracts and agreements.
7. Maintaining professional development records.
8. Responding to attendee questions.

Athenian Dialogue Contract Amounts

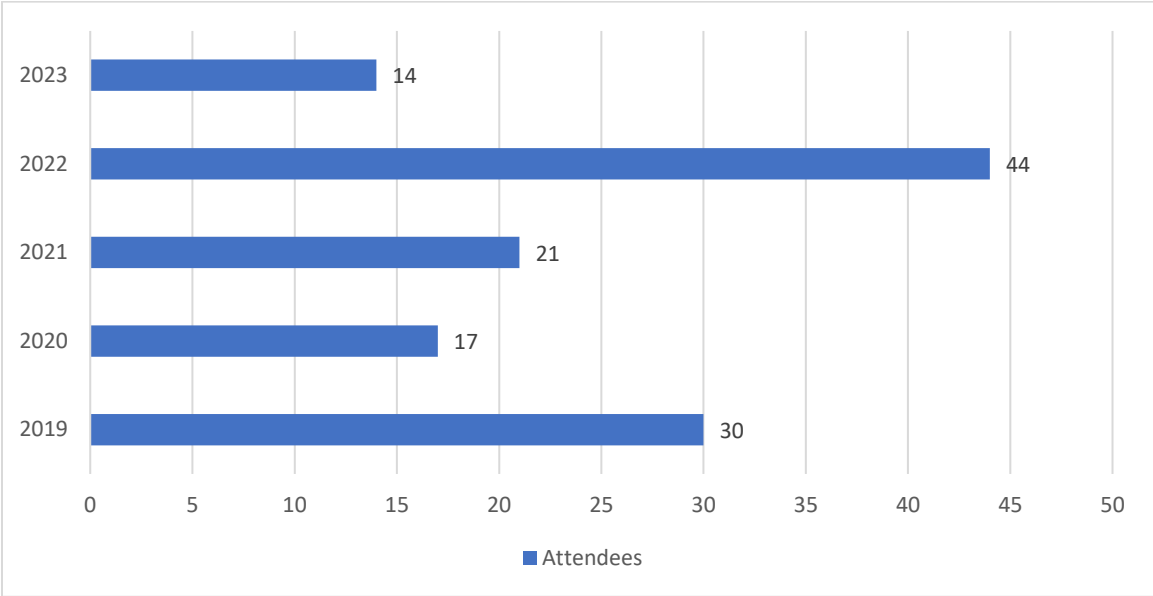
2022 Contract Amount: \$1,368 + \$1,332 (additional Athenian): \$2,700

2023 Contract Amount: (2022 + 4% increase): \$1,422.72

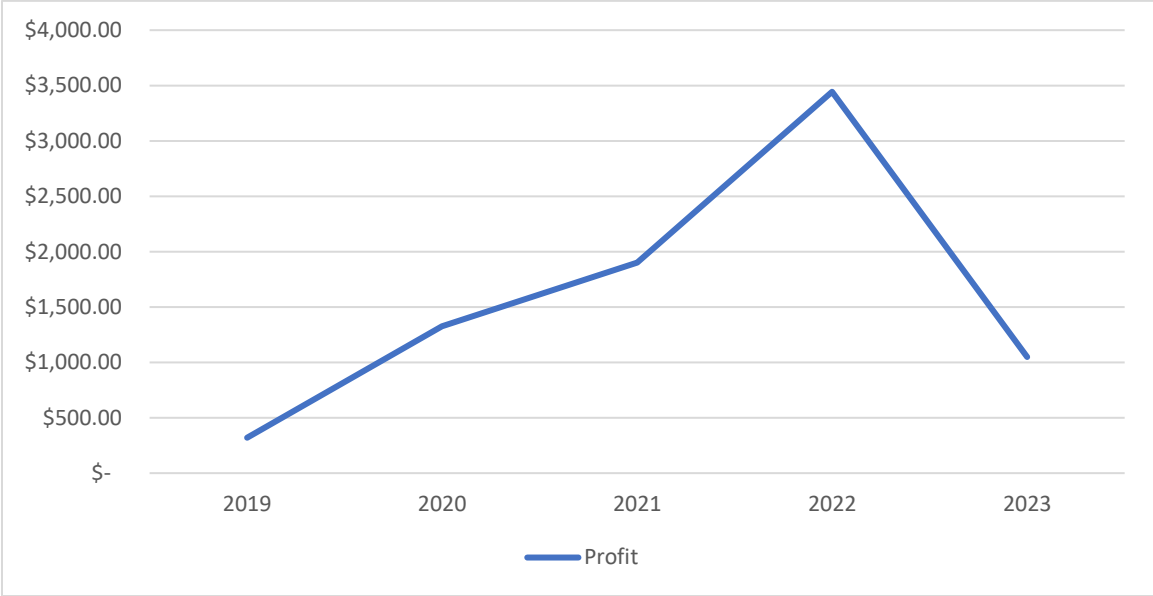
2024 Contract Amount: (2023 + 4% increase): \$1,479.63

Athenian Dialogue Data

Attendees by year



Profit by year



Website Development & Administration

1. Provide financial management functions for CCMFOA Including:
 - Create CCMFOA online payment products for membership, sponsorship, and promotional items.
 - Manage CCMFOA online payment portal.
 - Transfer CCMFOA proceeds (less credit card fees) as directed by CCMFOA leadership.
 - Provide audit of all outstanding CCMFOA invoices to ensure collection of funds; audit reports.
2. Website Development:
 - Determine website map.
 - Meet with website team to design/develop site.
 - Launch website.
3. Website Administration:
 - Manage user-friendly website to enhance membership experience.
 - Provide general updates as needed including: member information, professional development information, yearly updates, resources, etc.
4. Membership support:
 - Answer member questions.
 - Provide member list to LKM to support listserv.
 - Records requests.

Website Development & Administration Contract Amounts

2022 Contract: \$8,549

- **Financial Management:** \$1,665
- **Website Development:** \$4,220
- **Website Administration:** \$1,332
- **Athenian Dialogue (Spring Conference):** \$1,332

2023 Contract: \$2,997

- **Financial Management:** \$1,665
- **Website Management:** \$1,332

2024 Contract: \$2,997

- **Financial Management:** \$1,665
- **Website Management:** \$1,332

Kansas Certified Municipal Clerk State Certification Program

1. Update website with program information.
2. Create online application for clerks to apply and submit required information.
3. Develop online fee payment portal.
4. Review all application submissions and confirm receipt of required certification information.
5. Prepare and send out State Certification certificates to qualifying applicants.
6. Prepare and send out certificate plaques when requested and paid by applicants.

Kansas Certified Municipal Clerk State Certification Contract

Contract Agreement: The PPMC will retain the \$65 applicant fee to administer the program. Plaque fees paid by applicants covers cost of plaque and mailing costs. **No cost to CCMFOA to administer the program.**

Kansas Certified Municipal Clerk State Certification Program Data:

2023- 19 Applicants received 2023 – 2025 designation

Region VII Meeting 2023

The Region VII Meeting occurs in Kansas every three years.

1. Designing, developing, evaluating, and managing professional development offerings in consultation with the CCMFOA Board.
2. Preparing the budget and once adopted by the CCMFOA Board, implement professional development offerings within authorized budget.
3. Performing meeting planning and oversee professional development offerings, including:
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4. Performing financial management and reporting in connection with professional development offerings, including:
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 - Accounting for revenues collected and disbursement of funds.
 - Reporting on revenues, expenditures, and balances by program offering, and performing all administrative support for professional development offerings, including:
 - Registering participants.

- Preparing regular and electronic mailing lists, participant lists, name badges, participant packets, certificates of completion, and speaker confirmation and thank you letters.
 - Ordering amenities for meeting participants and speakers as necessary.
 - Providing on-site check-in assistance to meeting participants.
 - Ordering all necessary supplies.
5. Maintaining professional development records.
 6. Responding to attendee questions.

Region VII Meeting Contract Amounts

2023 Contract Total: \$4,440

Region VII Meeting Data

Attendees: 20

Profit/Loss: **(\$8,437.00)**

Financial Updates

CCMFOA previously had one established account at WSU that received revenues and paid expenses across all services. This account had not had disbursements made to CCMFOA since close-outs in early 2022. In early 2023, an audit was done with the account to determine what funds were included in the account and what funds needed to be disbursed to CCMFOA. Revenues consisted of memberships and professional development registrations/sponsorships. In fall of 2023, the PPMC suggested that each activity/professional development offering have its own account. This would make revenue/expense information easily available by year/event and have the ability to “close-out” the account either quarterly or after the completion of an event. The Executive Board approved that process. In the fall, accounts were established as follows:

- CCMFOA Professional Development (General)- Athenian Dialogues and Virtual Education
- CCMFOA Annual Conference
- CCMFOA Institute/Academy
- CCMFOA Memberships

After reconciling the account with events and memberships, the **PPMC is allocating \$76,482.09 back to CCMFOA.**

The PPMC will temporarily hold \$4,500 to cover final expenses from Institute/Academy and the cost of the Institute Director to attend the IIMC Conference in May. After the IIMC Conference- the account will be reconciled, and the residual balance will be sent to CCMFOA. This will close out the single account that is been utilized for over 15 years.

Moving forward, CCMFOA will receive membership revenues quarterly and professional development profit after each event. These will zero out accounts and provide CCMFOA will all funds in a timely manner.

PPMC Contract Summary:

2018 Total Contract Amount: \$30,243.58

2019 Total Contract Amount: \$37,518

2020 Total Contract Amount: \$40,650

2021 Total Contract Amount: \$43,665

2022 – 2024 Contracts

2022 Total Contract Amount: \$58,164.00

- Spring Conference- \$13,300
- Institute- \$17,650
- Academy- \$10,865
- Virtual Education Series (eight sessions) - \$5,100
- Athenian Dialogue (two sessions)- \$2,700
- Website Development & Administration (website development, financial management, website administration, spring conference Athenian dialogue)- \$8,549

2023 Total contract amount: \$57,651.32

- Spring Conference- \$13,832
- Institute/Academy- \$18,356 + \$11,299.60
- Virtual Education Series (eight sessions)- \$5,304
- Athenian Dialogue (one session)- \$1,422.72
- Website Development & Administration (financial management, website administration)- \$2,997
- Region VII Meeting (stand-alone contract) = \$4,440 (added into 2023 total contract amount)

2024 Total Contract Amount: \$52,251.73

- Spring Conference- \$14,385.28
- Spring Conference Vendor Fair Logistics (addendum to contract) = \$896.00
- Institute/Academy-\$19,090.24 + \$11,751.58
- Virtual Education Series (four sessions)- \$2,652
- Athenian Dialogue (one session)- \$1,479.63
- Website Development & Administration (financial management, website administration)- \$2,997

2024 Potential Contracts:

- Regional Meetings (Professional Development)- Pending Proposal
- Transcript Services- Pending Proposal