

2023

Annual Report

International Institute of Municipal Clerks



MISSION

The International Institute of Municipal Clerks (IIMC) is a professional, non-profit association that promotes continuing education and certification through university and college-based institutes and provides networking solutions, services and benefits to its members worldwide.

WHO WE ARE

Founded in 1947, the International Institute of Municipal Clerks is the leading and largest professional nonprofit association serving the needs of Municipal Clerks worldwide. With approximately 15,000 members, IIMC represents municipalities of less than 500 to more than 10 million.

Diverse perspectives in IIMC Membership and Leadership are critical to the Organization's ongoing success. IIMC views its members' diverse backgrounds and interests as assets and is committed to promoting inclusive environments where members from across the Municipal Clerk profession feel valued, respected and welcomed. IIMC does not discriminate based on profession, race, gender, religion, age, sexual orientation, nationality, disability, appearance, geographic location or professional level. IIMC is committed to having Board members that are representative of the diverse make-up of its membership.

President's Annual Message



Pamela Smith, MMC

IIMC President, 2022-2023

I write this message as your IIMC President with appreciation and gratitude for the work accomplished by the IIMC Board of Directors, IIMC committee members and our administrative staff over this past year. As I look back on the many things we accomplished, it was truly a productive year for our Organization.

We originally had the 2022 Midyear Board meeting scheduled for November 2022 in Orlando, FL. However, Hurricane Ian prevented us from meeting at that time. Therefore, The Board regrouped and held its Midyear Meeting in Ontario, CA, in January 2023.

"IIMC promotes life-long learning, skill development and public service and fosters a spirit of mutual assistance and goodwill among Municipal Clerks around the globe."

The Board and the IIMC Foundation accomplished the following:

- Foundation President Mary Lynn Stratta announced that the Foundation surpassed their goal of \$3 million. The Foundation had \$2,689,839 in unrestricted funds and \$903,437 in restricted funds for a total of \$3,593,273. As of August 31, 2023, the Foundation had contributed \$1,216,646.29 to IIMC for scholarships, grants and education programs.
- The Board of Directors approved the IIMC Constitution Task Force's recommendations to amend the IIMC Constitution and advanced it to the membership at the Annual Business Meeting in Minneapolis on May 17, 2023 for their vote. The Constitution was amended on September 3, 2023. The adopted amendments did not have a negative impact on the Organization or its finances.

- Since the 2027 Conference bids were not up to par with past Conference bids, the Board agreed to suspend the process until November 2023.
- The Board of Directors approved honorary membership for IIMC Past President Mary Johnston, MMC. It was my great honor to present her with her honorary membership at the Annual Conference in Minneapolis.



- Productive meetings with the Canadian Region Directors and the Netherlands Region Directors about furthering their education endeavors via the advent of Athenian Dialogues.
- It was an honor to be the first IIMC President in well over a decade to attend the VVG Congress in The Netherlands last year.

IIMC's financial picture continues to remain strong. The highlight of our budget year was IIMC reaching the milestone of establishing a \$1 million-dollar Board

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Chris Shalby

IIMC Executive Director

The International Institute of Municipal Clerks continues to make important strides to help its members by enhancing current and creating new education programs and working to streamline members' personal and professional experiences.

We have an engaged Board and staff. Their process and perspectives have been a huge benefit to the Organization and to its members. We continue to effectively communicate with you – our members -- and to focus on new and innovative ways of meeting. Our obligatory sessions of engagement via weekly and monthly communication continue and are now part of IIMC's operating fabric.

Board of Directors

The Board of Directors governs IIMC in an understandable and effective method, compliant and adhering to established financial and governance policies and the Constitution. Prior to each Board meeting, the Board holds an all-day session on Board development, reviewing roles and responsibilities and participating in practices to embellish their service on how a Board operates. IIMC now conducts a virtual orientation with every incoming Board member to acclimate them to the Board's inner workings.

This year, we concluded our third iteration of the three-year strategic plan, having met nearly 85% of its goals from the first two plans. We will be embarking on our fourth strategic plan for 2024 to 2026. The new plan will take into consideration new directions culled from the 2022-2023 membership survey.

Headquarter Building

IIMC relies on its tenants to help with its Headquarter expenses. Currently, we have two tenants. We have signed a five-year lease with the option of an additional five years after 2027 with one. Our other tenant

began their three-year lease in August 2022. Both tenants' leases will generate approximately \$5,734 in monthly income. IIMC's monthly mortgage is approximately \$2,900, leaving IIMC with a windfall.

As with anything regarding maintenance, Headquarters is no different. From repaving our parking lot to serving tenants' needs, IIMC is fortunate to use the windfall from rental income to maintain its investment. A property management firm helps coordinate the building's upkeep.

IIMC Personnel

IIMC has been operating within a hybrid schedule with most staff in the office three or more days per week and working remotely on those other days. We also have two staff members who work out of state. We have nine full time staff, one part-time finance specialist and five independent contractors. IIMC's staff operates as a cohesive group. These individuals are self-starters, creative, and have the utmost interest in maintaining this Organization's viability and premier status as the only professional global Organization for Municipal Clerks.

Finance

The 2022 year-end budget will mark the sixteenth consecutive year the Organization has produced a balanced budget. General fiscal responsibility has shaped where IIMC is today regarding its finances. Financial information is provided on pages 7-9.

In May 2022, IIMC realized \$1 million in its Board Designated Reserves. This has been a collective effort for the past 10 years. The Board approved the hiring of the firm Urban Wealth Management to invest in long-term Certificate of Deposits and conservative stocks. Within a few years, we expect those funds to generate considerable interest that can be used toward edu-

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tional, scholarships and other endeavors. This is quite an accomplishment, considering 13 years ago, IIMC was struggling financially. IIMC's financial accomplishments are a strong indication of the Organization's collective efforts and willingness to adhere to a set budget, work with a financially conservative outreach policy and a unique conference selection process, all the while continuing to broaden its horizons and provide members with valuable services.

2023 Conference – Minneapolis, MN

The 2023 Conference in Minneapolis attracted 805 total attendees with 630 Delegates and 16 Guests. Conferences are IIMC's major method of procuring additional dollars outside of membership dues. It's imperative that we continue to follow policies, processes and standard monitoring practices to ensure these events are successful from a financial standpoint.

Education

The Education Department consistently meets members' educational needs and stays abreast of education guideline improvements. Dr. Bea Rodriguez facilitates and creates IIMC's Education programs. She has successfully launched the Online Professional Development Program, which is entering its third year, along with the Education PLUS Program and fostered a partnership with the Leadership Development Academy. She has also refined the department's processes critical to certification and granting CMC and MMC designations, Association course reviews, and Institute Annual Reports.

Dr. Jaimis "Jai" Ulrich joined IIMC in March 2022, providing IIMC with an educational background and perspective. Although Dr. Rodriguez oversees the Department's overall direction, Dr. Ulrich manages IIMC's certification programs, the Athenian Dialogue process, Foundation scholarship and grant programs, and the logistical duties of planning the Annual Conference education program, including speakers, conferences, and transcripts. Dr. Ulrich assists with the Institute's Annual Reports and the course review process as needed.

Education Coordinator Iris Hill adds robust support to this Department. She counsels members about the certification and application process and assists Dr. Rodriguez with the Online Professional Development Program, course review and Paul Craig Athenian Fellows. She provides full administration support with certificates and month-end reports. She supports both Dr. Rodriguez and Dr. Ulrich.

CMCs and MMCs – As of October 30, 2023

- CMC Grand total = 4,419 in the United States and 137 internationally.
- MMC Grand total = 1,388 in the United States and 29 internationally.

New Certification Process – The new certification process is yielding positive outcomes. We are proud of our delegates and their willingness to embrace change as we refine and strengthen our process. For example, of the 210 members who submitted their CMC application via the portal, 80% resulted in certification averaging far below our previous 5-6 weeks wait time.

Athenian Leadership Society

Virtual dialogues are now a permanent option. This has made a huge impact on the number of individuals attending dialogues; the number of dialogues being hosted by Institutes and Associations and the number of Athenian Fellow recognitions awarded.

The Athenian Leadership Society has grown substantially in the last two years, as noted by the number of Fellows awarded. In 2023, we held 76 Dialogues, an increase of 34 from 2022. We also awarded 25 Paul Craig Athenian Fellows in 2023, an increase of 13 from 2022

There are 82 approved Athenian Facilitators and 248 books on the Approved Booklist.

IIMC Foundation

The Education Department acts as a liaison for the Foundation and holds the records for all scholarships and grants. The Foundation provided IIMC with



approximately \$40,000 in education funds in 2022-2023. Those funds are used toward conference facilitators, general speakers and other education programs.

CMC/MMC Scholarships

The 2023 CMC/MMC restricted scholarship applications, which provide reimbursement for Institute and Academy attendance, continue to attract applicants from throughout the Regions.

IIMC offers Conference and Region Grants. Applicants are invited to visit www.iimc.com to discover how individuals and Regions can apply for these Grants.

2023-2024 Online Professional Development Program - The 2023 program concluded with eight successful courses. The 2024 online calendar is complete with 16 courses, four per quarter. Upcoming courses are promoted through our weekly E-briefing in plenty of time to register. Topics of interest include Ethics, Diversity, Equity, and Inclusivity (DEI), Leadership principles and practice, strengths-based leadership, and other topics relevant to members' professional responsibilities.

Education P.L.U.S. Program – The program launched in July 2023 with approximately 87 enrollments.

NACo High Performance Leadership Academy – The High-Performance Leadership Academy from the National Association of Counties (NACo) is a 48-hour leadership program eligible for eight CMC Experience, eight MMC Advanced Education or eight MMC Professional Contribution points. NACo has given IIMC members a \$300 scholarship toward the registration costs of the program. IIMC is delighted to be able to share a top-notch program with the membership.

Membership

IIMC's membership numbers in Region I through X remain consistent. Region XI is under the bulk membership scheme (one fee covers the entire Association for SLCC, ADSO, VVG and IMASA). Our previous Inactive 2 Active Member Drive which began in 2017 and

ended in early 2022 brought in 365 new members. Of the 365 new members, more than half are still active.

We began the 2023 Member Drive in late December 2022. Today, we have 207 new members with the numbers increasing monthly. With the constant ebb and flow of our membership, this list will continue to be a member drive list for the future.

The 2023 membership revenue is expected to end the year with a profit of \$1,425,000. The budget was projected at \$1,405,000. There is still the possibility of increasing this number by year-end.

The department has taken measures to ensure continuity of IIMC's 14,934 membership base, primarily by concentrating on personal contact with members who are close to losing their membership, utilizing the IIMC education opportunities through Virtual Institutes and easy access to online learning and continuous promotion to recruit new members. We are acutely aware of budget constraints and we're using our monthly E-Briefings to promote IIMC services, member engagement, education and features. We are also employing the Board in recruiting efforts with the Region Director Challenge.

The Department continues its concerted efforts to contact members via phone and email to help secure dues and make the members aware of the benefits of their membership. Janis Daudt and Tammy Storrie are the main points of contact with our members. The addition of new staff in Spring 2024 will help in membership recruitment, customer relations and conference responsibilities.

Marketing and Communications

IIMC continues to increase outreach, strengthen support, and provide IIMC resources and marketing promotions, improving the suite of resources on the IIMC website, assisting IIMC Regions, Leaders, and Departments distribute various mass mail communications and works closely with the Education Department to market its programs and resources.

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Committees - Valuable Vehicles That Drive IIMC

Committees are important systems used to accomplish much for IIMC. They take on specific and detailed work when the task is too complex and time consuming to handle in Board meetings. What's more, IIMC Committees provide opportunities for the Organization to foster and develop talent to keep the leadership pipeline full. Involving more people, allowing volunteers to use their specialized skills or interests, and addressing work in groups make IIMC Committees a necessary and essential asset for the Organization.

IIMC regularly performs a sunset review of its existing committee structure and adjusts it based on the Organization's changing governance needs. In the past, the Board eliminated the Program Review Committee and created the Education Professional Development Committee, combined two separate committees – Membership and Mentoring – into one committee and eliminated the Legislative Committee.

IIMC members who volunteer to serve on Committees reap great rewards, realizing their service and commitment are learning and growing experiences. As with every association, volunteers are key to any association's growth and success. Without volunteers, associations stagnate.

During 2022 and 2023, standing committees worked toward common goals and objectives, providing input

on direction and were instrumental in bringing new ideas or programs to fruition. All Committees are required to file mid-year and year-end reports regardless of whether they recommend action.

The following Committees submitted 2022 – 2023 year-end reports with NO ACTION REQUIRED:

- Budget & Planning
- Conference
- Education & Professional Development
- Elections
- International Relations
- Membership/Mentoring
- Public Relations/Marketing
- Records Management
- Research and Resource

The following Committee submitted 2022 – 2023 year-end reports with ACTION REQUIRED:

- Policy

In a nutshell, all reports were accepted, proving that effective and constant communication between the Board, staff and committees are crucial and imperative to a healthy Organization.

NOTE: IIMC gratefully acknowledges and thanks each committee Chair, Vice Chair and members for their insight and collaborative efforts in meeting their goals and objectives.



Executive Director's Update
Continued from page 5

E-Briefings

E-Briefings continue to be our most frequent communication. The E-Briefing incorporates release of the monthly News Digest and IIMC Foundation updates to increase efficiency in communications and reduce mass mail fatigue for recipients. An E-Briefing average open rate of 35.0%

News Digest

The News Digest is produced monthly and distributed via Constant Contact, which directs readers to the IIMC website and drives traffic to the website for archived News Digests and other IIMC online resources.

A longstanding goal for The News Digest has been to increase content authored by members. The IIMC Public Relations and Marketing Committee and IIMC International Committee continue to submit monthly articles. Content created by and written about Clerks continues to be very popular among readers. One of the most widely circulated pieces was the August 2023 article, *What's In A Name*.

Independent Account's Compilation Report

Board of Directors
 International Institute of Municipal Clerks
 Rancho Cucamonga, California

Management is responsible for the accompanying financial statements of International Institute of Municipal Clerks (A Not-for-Profit Corporation), which comprise the statements of financial position as of December 31, 2022, and the related statements of activities, functional expenses and cash flows for the year then ended, and the related notes to the financial statements in accordance with accounting principles generally accepted in the United States of America. We have performed a compilation engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. We did not audit or review the financial statements, nor were we required to perform any procedures to verify the accuracy or the completeness of the information provided by management. We do not express an opinion, a conclusion, nor provide any form of assurance on these financial statements.

We have previously compiled the International Institute of Municipal Clerks' 2021 financial statements and issued a compilation report on those financial statements in our report dated May 3, 2022. The summarized comparative information presented herein as of and for the year ended December 31, 2021, is consistent, in all material respects, with the compiled financial statements from which it has been derived.

GYL LLP
 Ontario, California
 April 25, 2023



President's Message
 Continued from page 2

Designated Reserve Fund. We have invested the funds with the Urban Wealth Management firm, investing in long-term CDs and Socially Responsible Investment companies. We are extremely grateful for the work of our Budget Committee, Finance Specialist Janet Pantaleon and CPA Consultant Connie Parker.

The Education and Professional Development Department, Education Committee, Board of Directors and the Municipal Clerks who developed the "Beyond the MMC" continuing education program for those members who are MMCs. The newly named "PLUS" program will be launched in January 2024. As of today, we have 87 members registered in the program. The next enrollment date begins in January 2026. This program provides members with high standards of integrity,

and an assessed commitment to lifelong learning and professional development.

It has been an honor to serve you this past year. Serving as President of an International Association, comprised of members who unselfishly dedicate their lives to public service, is a tremendous honor. When asked about my role as President and the makeup of our membership: We are all committed to our Organization's primary purpose.

In closing, I would encourage you all to get involved in your Organization. You, as members, are responsible for the Organization that you deserve.

It has been a wonderful year, thank you all again.

**INTERNATIONAL INSTITUTE OF
MUNICIPAL CLERKS**
(A Not-for-Profit Corporation)

STATEMENTS OF FINANCIAL POSITION

December 31, 2022
(Summarized Totals for 2021)

	ASSETS	
	<u>2022</u>	<u>2021</u>
Current Assets		
Cash and cash equivalents	\$ 2,562,415	\$ 2,372,926
Accounts receivable	47,007	17,988
Prepaid expenses	4,831	3,574
Conference prepaid expenses	<u>56,396</u>	<u>61,576</u>
Total Current Assets	<u>2,670,649</u>	<u>2,456,064</u>
Property and Equipment, net	<u>740,741</u>	<u>773,114</u>
Total Assets	<u>\$ 3,411,390</u>	<u>\$ 3,229,178</u>
LIABILITIES AND NET ASSETS		
Current Liabilities		
Accounts payable	\$ 50,383	\$ 29,361
Accrued liabilities	83,547	77,522
Deferred revenue	849,858	871,732
Tenant security deposits	6,150	3,558
Mortgage note payable - current portion	<u>15,029</u>	<u>14,513</u>
Total Current Liabilities	<u>1,004,967</u>	<u>996,686</u>
Long-Term Liabilities		
Mortgage note payable	<u>502,079</u>	<u>516,136</u>
Total Liabilities	<u>1,507,046</u>	<u>1,512,822</u>
Net Assets		
Without Donor Restrictions		
Undesignated	680,711	543,028
Investment in property and equipment, net of related debt	223,633	242,465
Board designated for operating reserve	<u>1,000,000</u>	<u>930,863</u>
Total Net Assets Without Donor Restrictions	<u>1,904,344</u>	<u>1,716,356</u>
Total Liabilities and Net Assets	<u>\$ 3,411,390</u>	<u>\$ 3,229,178</u>



**INTERNATIONAL INSTITUTE OF
MUNICIPAL CLERKS**
(A Not-for-Profit Corporation)

STATEMENTS OF ACTIVITIES
For the Year Ended December 31, 2022
(Summarized Totals for 2021)

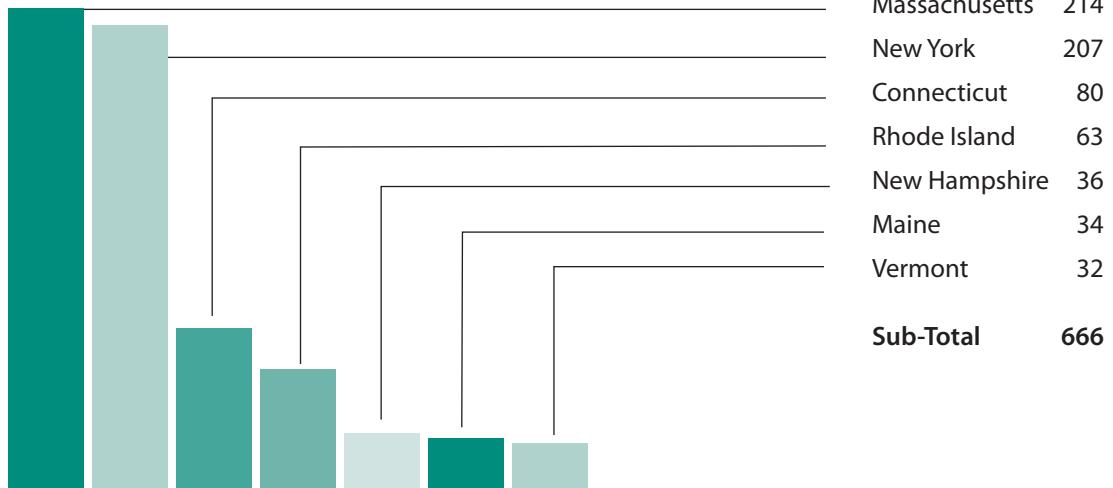
	Without Donor	With Donor	Total	
	Restrictions	Restrictions	2022	2021
REVENUES				
Membership dues	\$ 1,353,519	\$ -	\$ 1,353,519	\$ 1,337,093
Conference	514,318	-	514,318	370,125
Education	203,552	-	203,552	184,224
Marketing development and promotion	30,150	-	30,150	21,891
Building rental	51,380	-	51,380	50,022
Interest	6,402	-	6,402	3,270
Total Revenues	2,159,321	-	2,159,321	1,966,625
EXPENSES				
Program Services				
Education	333,521	-	333,521	249,284
Conference	492,901	-	492,901	411,847
Member services	251,369	-	251,369	255,936
Marketing development and promotion	162,563	-	162,563	157,953
Building	84,599	-	84,599	82,513
Supporting Services				
General and administration	646,380	-	646,380	665,235
Total Expenses	1,971,333	-	1,971,333	1,822,768
Change in net assets	187,988	-	187,988	143,857
Net assets, beginning of year	1,716,356	-	1,716,356	1,572,499
Net assets, end of year	\$ 1,904,344	\$ -	\$ 1,904,344	\$ 1,716,356



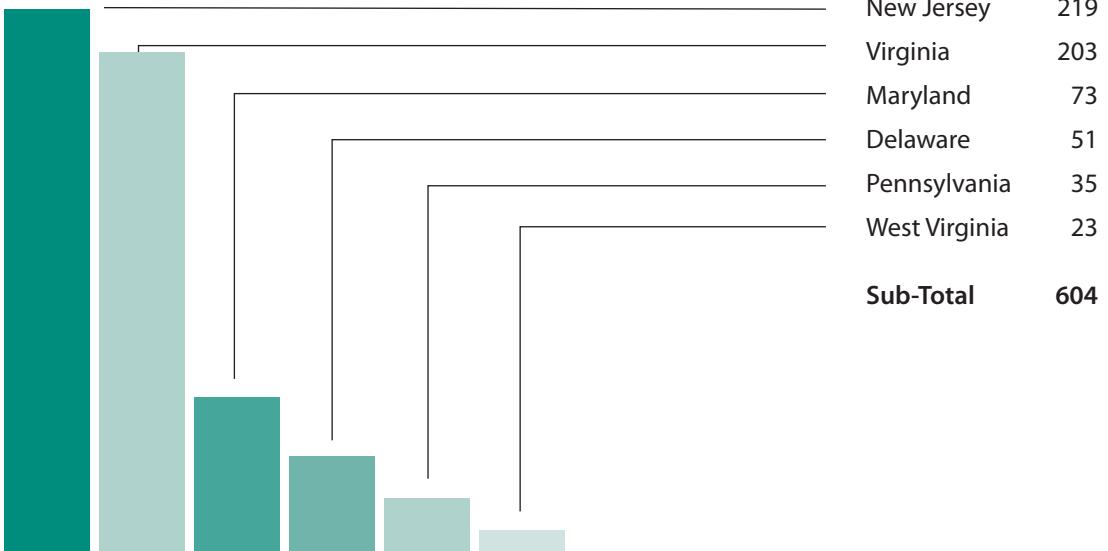
IIMC State/Regional/National Membership

The following chart represents IIMC membership in each state, province and country. As of September 2023, California leads all states in membership with 1,097. Region XI (Outside North America) leads all Regions in total membership with 5,663. British Columbia leads all members in Canada with 102. England leads all countries in Region XI with 4,938 members, followed by the Netherlands with 576. IIMC's total membership is 14,934.

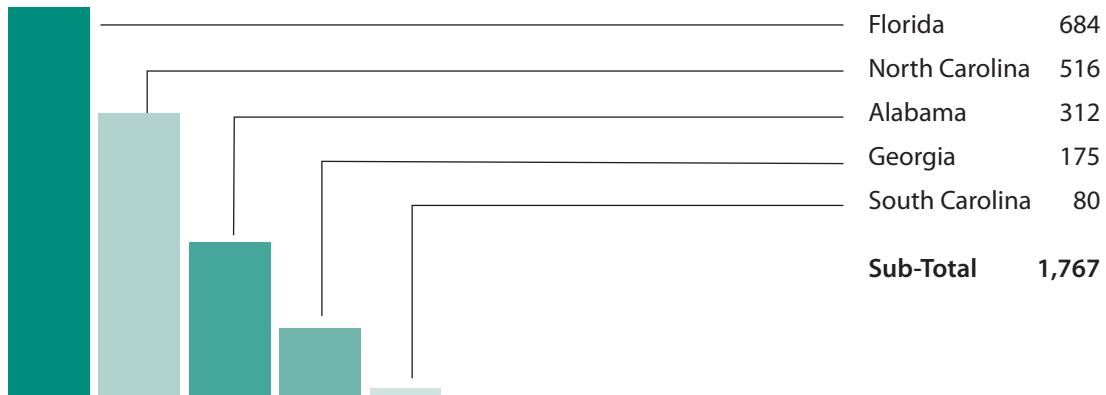
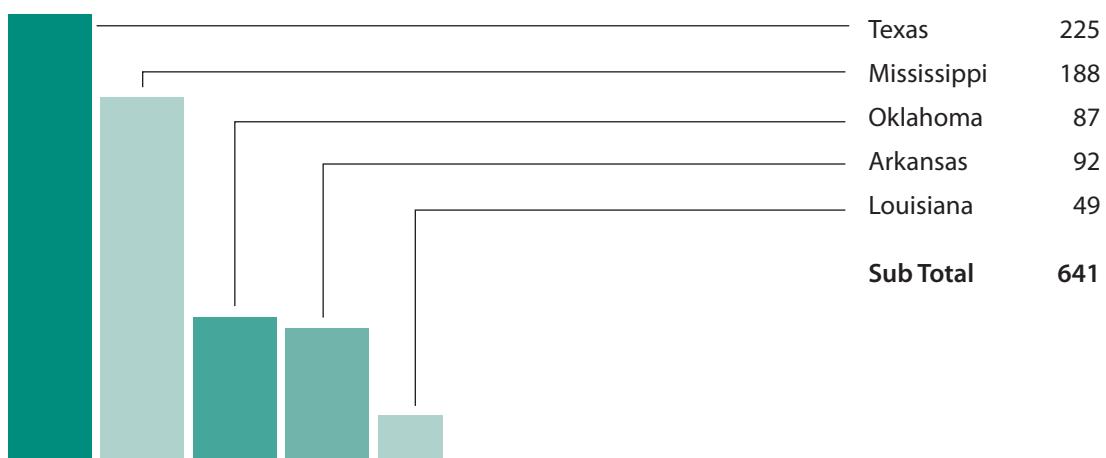
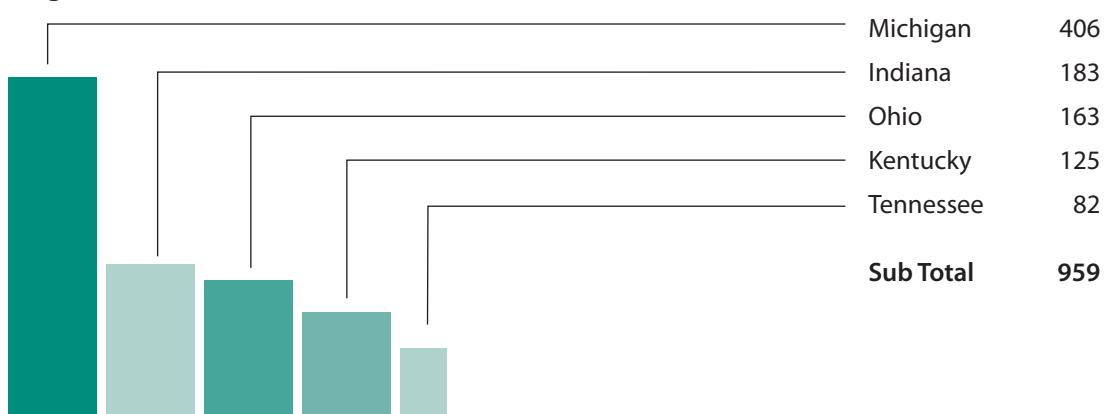
Region I



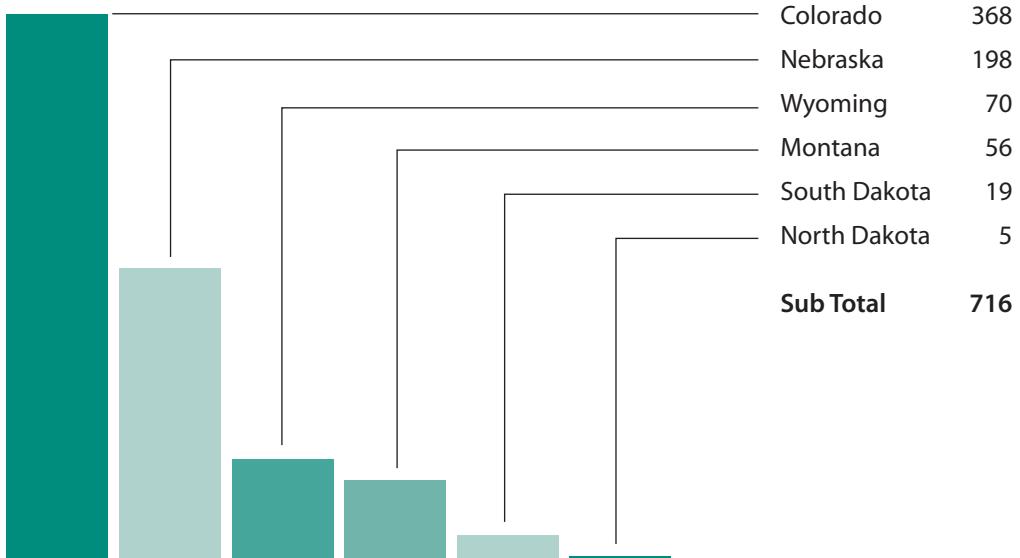
Region II



IIMC State/Regional/National Membership (continued)

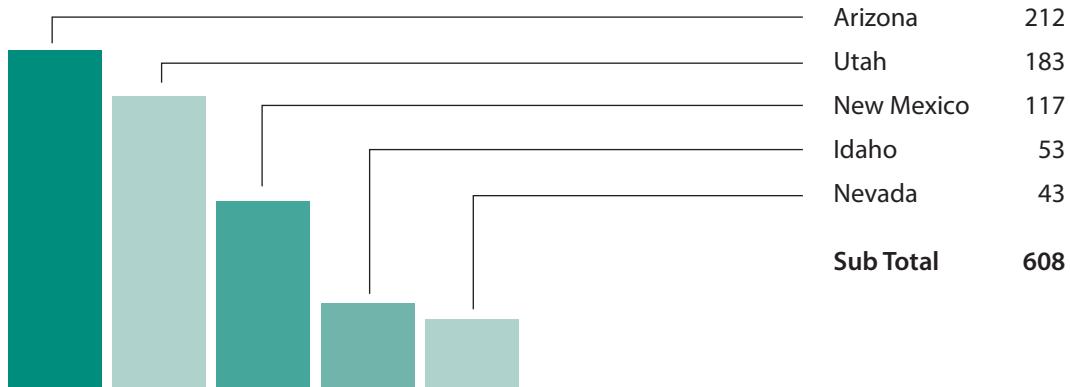
Region III**Region IV****Region V**

IIMC State/Regional/National Membership (continued)

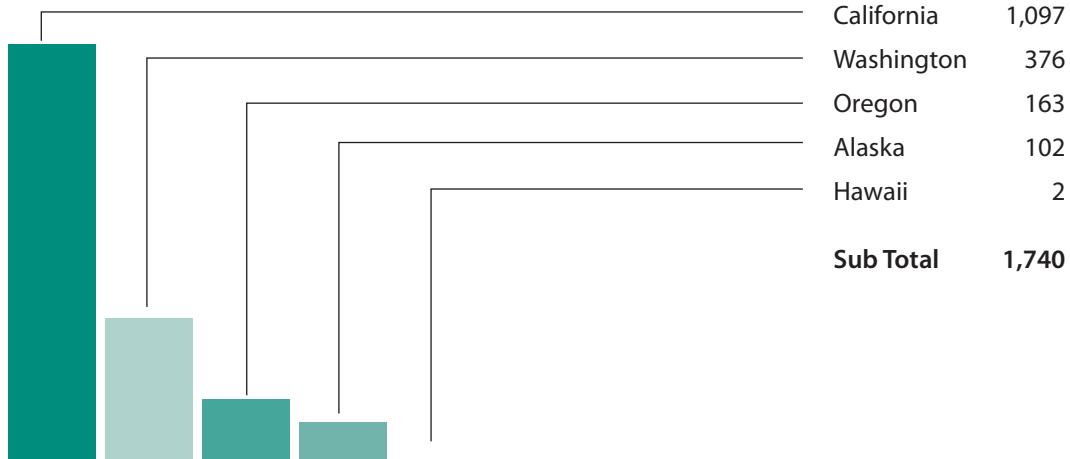
Region VI**Region VII****Region VIII-East**

IIMC State/Regional/National Membership (continued)

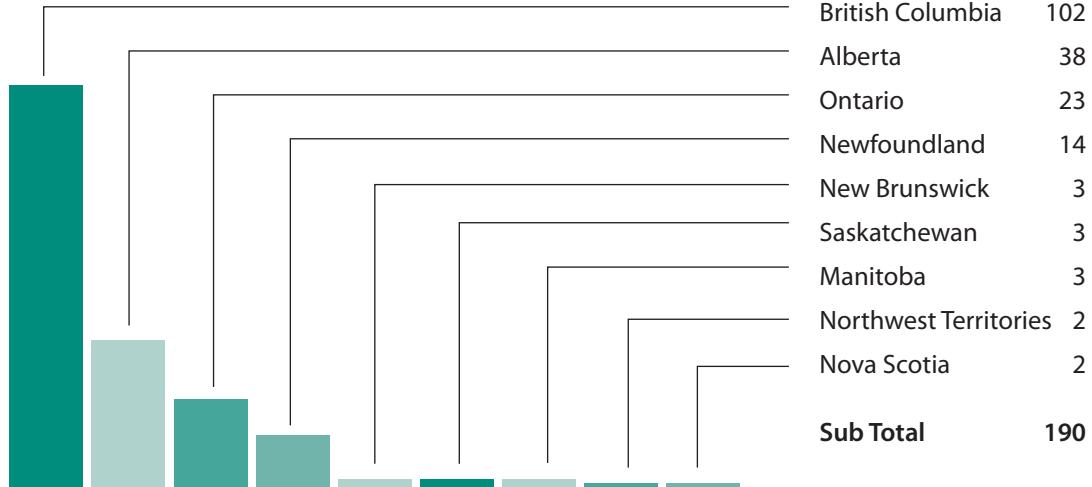
Region VIII-West



Region IX

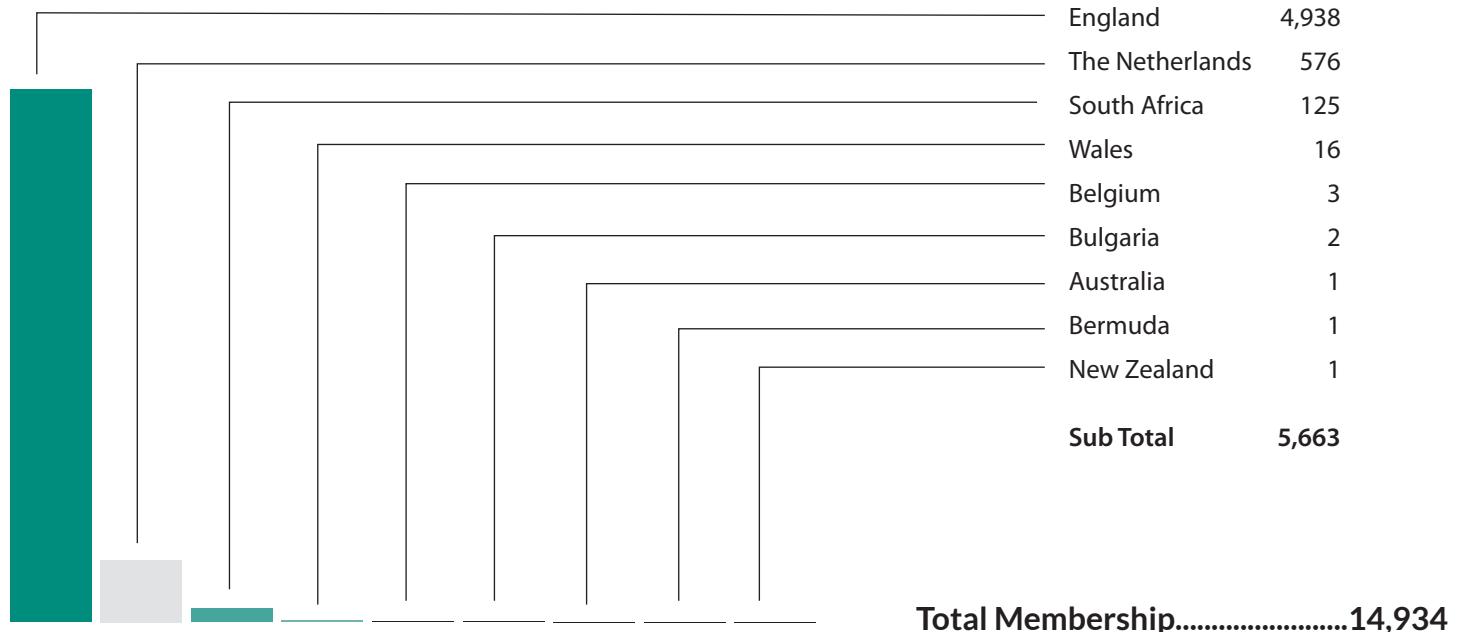


Region X (Canada)



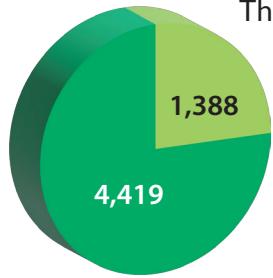
IIMC State/Regional/National Membership (continued)

Region XI (Outside North America)



Certification and Master Municipal Clerk Academy Figures

The Certified Municipal Clerk program began in 1971.



As of September 2023, there is a total of 4,419 active CMCs in Regions I through IX and 137 in Regions X and XI.

As of September 2023, there is a total of 1,388 MMCs in Regions I through IX and 29 in Regions X and XI.

IIMC Board of Directors



PRESIDENT
Pamela Smith, MMC
 City Clerk
Lee County, FL



PRESIDENT ELECT
Mary Ann Hess, MMC
 City Clerk
Laurel, MS



VICE PRESIDENT
Lisa Garcia, MMC
 Deputy Town Manager/Town Clerk
Florence, AZ



IMMEDIATE PAST PRESIDENT
Sheri Pierce, MMC
 City Clerk
Valdez, AK

DIRECTORS – 2023 EXPIRATION

Diane Pflugfelder, MMC
 Municipal Clerk/Administrator
Liberty Township, NJ
 Region II

Phyllis McGraw, MMC
 City Clerk
Bossier City, LA
 Region IV

Gloria Christensen, MMC
 City Clerk
Humboldt, IA
 Region VI

Janet E. Gray, MMC
 City Clerk
Rantoul, IL
 Region VII

Stephen Huycke, CMC
 Director Legislative Services/City Clerk
Richmond Hill, Canada
 Region X

DIRECTORS – 2024 Expiration

Sue Haag, MMC
 Town Clerk/Tax Collector
Austerlitz, NY
 Region I

Lee Frazier, MMC
 City Clerk
Birmingham, AL
 Region III

Angela E. Richburg, MMC
 City Clerk/Finance Director
Byram, MS
 Region IV

Angie Marshall, MMC
 City Clerk/City Recorder
Kingsport, TN
 Region V

Marita Rhude, MMC
 City Clerk/Treasurer
Barrett, MN
 Region VI

Celyn N. Hurtado, CMC
 City Clerk
Garden City, KS
 Region VII

Ruth Post, MMC
 City Recorder
Philomath, OR
 Region IX

Hans Rijs, MMC
 Municipal Clerk
Bodegraven-Reeuwijk, the Netherlands
 Region XI

DIRECTORS – 2025 EXPIRATION

Kathleen Montejano, MMC
Lewiston, ME
 Region I

Travis O. Morris, MMC
County of Albemarle, VA
 Region II

Tory Frink, MMC
Alamance County, NC
 Region III

Carrie Mugford, CMC
North Manchester, IN
 Region V

Angela Johnson, MMC
Meeteetse, WY
 Region VIII - East

Ida Fierro, CMC
Bernadillo, NM
 Region VIII - West

Jamie Newman, MMC
Wasilla, AK
 Region IX

Lana Antony, CMC
Coaldale, Alberta, Canada
 Region X

