



**International Institute of Municipal Clerks  
Board of Directors  
Annual Meeting Agenda  
May 16-17, 2025**

**Hyatt Regency St Louis At The Arch –  
St Louis , MO**



# International Institute of Municipal Clerks

## 2024/2025 IIMC Board of Directors Roster

Term: May 23, 2024 through May 21, 2025

### ***PURPOSE:***

### ***2024/2025 Goals & Objectives***

### ***Deadlines:***

<b>July 15, 2024</b>	Identify and submit to Headquarters budget justification requested (if any) necessary to accomplish the Committee's goals and objectives. All requested will be reviewed by the Budget and Planning Committee.
<b>September 17, 2024</b>	File a Report with Headquarters for inclusion with agenda materials for the November IIMC Board of Directors Mid-Year Meeting.
<b>March 26, 2025</b>	File the final report with Headquarters for inclusion with the Annual Report.

**Lisa Garcia, MMC**  
**President**  
Deputy Town Manager/Town Clerk Town  
of Florence  
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**Dawn G. Abrahamson, MMC**  
**President Elect**  
City Clerk  
City of Vallejo  
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**Lee Frazier, MMC**  
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City Clerk  
City of Birmingham  
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**Mary Ann Hess, MMC**  
**Immediate Past President**  
City Clerk  
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**Kathleen M. Montejo, MMC**  
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City Clerk  
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**Kerri A. Parker, MMC**  
**Region I Director**  
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Town of Meredith  
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**Awilda Hernandez, MMC**  
**Region II Director**  
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**Travis O. Morris, MMC**  
**Region II Director**  
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## 2024/2025 IIMC Board of Directors Roster

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**Tory Frink, MMC**  
**Region III Director**  
Clerk to the Board  
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**Lori McWilliams, MMC**  
**Region III Director**  
Village Clerk/PIO  
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**Sherri E. Gard, MMC**  
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**Curtis Green, CMC**  
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**Carrie Mugford, MMC**  
**Region V Director**  
Clerk/Treasurer  
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**Kathy J. Walker, MMC**  
**Region V Director**  
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**Elena Hilby, MMC**  
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**Leesa Ross, MMC**  
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**VACANT**  
**Region VII Director**  
**Phone:**  
**Fax:**  
**Email:**

## 2024/2025 IIMC Board of Directors Roster

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**Angela R. Johnson, MMC****Region VIII Director E**

Clerk/Treasurer

Town of Meeteetse

P.O. Box 38

Meeteetse, WY 82433-0038

**Phone:** (307) 868-2278**Fax:** (307) 868-2608**Email:** [meetetse@townofmeetetse.org](mailto:meetetse@townofmeetetse.org)**Julie Barnett, MMC****Region VIII Director E**

City Clerk

City of Evans

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**Phone:** (970) 475-1104**Fax:****Email:** [jbarnett@evanscolorado.gov](mailto:jbarnett@evanscolorado.gov)**Ida Fierro, CMC****Region VIII Director W**

Town Clerk/Administrator

Town of Bernalillo

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Bernalillo, NM 87004-0638

**Phone:** (505) 867-3311**Fax:** (505) 867-0481**Email:** [ifierro@tobnm.gov](mailto:ifierro@tobnm.gov)**Colleen A. Mulvey, MMC****Region VIII Director W**

City Recorder

City of Cedar Hills

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Cedar Hills, UT 84062

**Phone:** (801) 785-9668 X 503**Fax:** (801) 796-3543**Email:** [cmulvey@cedarhillsutah.gov](mailto:cmulvey@cedarhillsutah.gov)**Jamie E. Newman, MMC****Region IX Director**

City Clerk

City of Wasilla

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Wasilla, AK 99654

**Phone:** (907) 373-9090**Fax:** (907) 373-9092**Email:** [jnewman@cityofwasilla.gov](mailto:jnewman@cityofwasilla.gov)**Marc A. Donohue, MMC****Region IX Director**

Government Services Director/City Clerk

City of Eastvale

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Eastvale, CA 91752

**Phone:** (951) 703-4421**Fax:** (951) 361-0888**Email:** [mdonohue@eastvaleca.gov](mailto:mdonohue@eastvaleca.gov)**Stephen Huycke, CMC****Region X Director**

Director, Legislative Services/City Clerk

City of Richmond Hill

225 East Beaver Creek Road

Richmond Hill, ON L4B 3P4

CANADA

**Phone:** (905) 771-2529**Fax:** (905) 771-2502**Email:** [stephen.huycke@richmondhill.ca](mailto:stephen.huycke@richmondhill.ca)**Lana Antony, MMC****Region X Director**

Municipal Clerk

Town of Coaldale

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Coaldale, AB T1M 1N1

CANADA

**Phone:** (403) 345-1306**Fax:****Email:** [lana.antony@coaldale.ca](mailto:lana.antony@coaldale.ca)**Arnout van Kooij, MMC****Region XI Director**

Griffier

City of IJsselstein

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THE NETHERLANDS

**Phone:** (030) 686-1797**Fax:****Email:** [ajo.van.kooij@ijsselstein.nl](mailto:ajo.van.kooij@ijsselstein.nl)**Linda Larter****Region XI Director**

Town Clerk

Sevenoaks Town Council

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**International Institute of Municipal Clerks**  
**Board of Directors ~ Annual Meeting Agenda**  
**Hyatt Regency at the Arch – St. Louis, Missouri**  
**May 17, 2025**

1.	Call to order	
2.	Roll Call	
3.	Agenda approval	
4.	Consent agenda approval	
	a. DRAFT Minutes– November 16, 2024 – Midyear Meeting	8
	b. DRAFT Minutes December 9, 2024 – Board Meeting – Virtual	14
5.	Foundation Report Update – Buster Brown – Verbal	
6.	Executive Director Update – Chris Shalby – <b>NO ACTION REQUIRED</b>	16
7.	Education Department Report — <b>NO ACTION REQUIRED</b>	21
8.	Region XI Report – Tom Van Der Hoven – <b>NO ACTION REQUIRED</b>	29
	a. <i>2025 ADSO Symposium Education Agenda</i>	31
	b. <i>2025 Study Abroad/Symposium Brochure</i>	34
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9.	Committee Reports – Board Liaisons Introduce Reports - <b>NO ACTION REQUIRED</b>	
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	i. Research and Resource	58
10	Committee Reports – Board Liaisons Introduce Reports – <b>ACTION REQUIRED</b>	
	a. Elections	60
	b. Policy	61
	c. Budget and Planning	65
11	Financials – <b>ACTION REQUIRED</b>	
	a. 2024 DRAFT Year-End Budget with notes – Shalby/Kane – <b>Attached</b>	67
	b. 2024 Year-End Schwab Investment Statements – <b>Attached</b>	78
	c. 2024 Audit Report – Kane/Shalby – <b>Attached</b>	102
	d. 2025 First Quarter Financials – Shalby/Kane – <b>Attached</b>	117
12	Staff Reports – <b>NO ACTION REQUIRED</b>	
	a. Communications – Karen Lee	128
	b. Membership – Janis Daudt	131
13.	Annual Conference Updates	
	a. 2026 – Reno, NV – Shalby (5-day Conference – 80 <sup>th</sup> Anniversary) Verbal	
	b. 2027 – Ft. Worth, TX – Shalby – Verbal	
	c. 2028 – Bellevue, WA – Shalby – Verbal	
	d. 2029 – TBD at 2025 midyear Board meeting	
14.	Other Business and Announcements	
15.	Adjournment	

INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

Board of Directors Meeting

November 16, 2024

Hyatt Regency St. Louis at the Arch, St. Louis, MO

Minutes

**CALL TO ORDER**

President Lisa Garcia called the IIMC Board of Directors meeting to order at 8:17AM. Saturday, November 16, 2024.

Board Members Present:

President Lisa Garcia, MMC  
President Elect Dawn Abrahamson, MMC  
Vice President Lee Frazier, MMC  
Immediate Past President Mary Ann Hess, MMC  
Region I Directors: Kathleen Montejo, MMC; Kerri A. Parker, MMC  
Region II Director: Travis Morris, MMC  
Region III Directors: Tory Frink, MMC; Lori McWilliams, MMC  
Region IV Directors: Sherri Gard, MMC; Curtis Green, CMC  
Region V Directors: Carrie Mugford, CMC; Kathy J. Walker, MMC  
Region VI Director: Elena Hilby, MMC  
Region VII Directors: Leesa Ross, MMC, Margo M. Gray  
Region VIII East Director: Angela Johnson, MMC; Julie Barnett, MMC  
Region VIII West Directors: Ida Fierro, CMC; Colleen Mulvey, MMC  
Region IX Directors: Jamie Newman, MMC; Marc Donohue, MMC  
Region X Directors: Lana Antony, MMC; Stephen Huycke, CMC  
Region XI Directors: Linda Larter, Arnout van Kooij, MMC

Staff Members Present: Executive

Director, Chris Shalby  
Finance Specialist, Shannon Kane  
Administrative Coordinator, Marlena Hernandez  
Office Manager, Janet Pantaleon  
Director of Professional Development, Dr. Beatrice Rodriguez  
Assoc Director of Professional Development, Dr. Jaimis Ulrich  
Education Coordinator, Iris Hill  
Director of Member Services, Janis Daudt  
Assoc Director of Member Services, Tammy Storrie  
Member Services Representative, Stephanie Galarza  
Communications Specialist, Karen Lee  
Parliamentarian, Nicole Learson

*Region III Director, Travis Morris moved to excuse absence of Region Directors Awilda Hernandez and Trish Gleason. Motion approved unanimously*

## **AGENDA**

President Garcia welcomed Board and guests to meeting and requested to move items 7b, 7c and 7d to be referred to Regions X and XI for clarity and brought forward for information at the May Board meeting in St. Louis, MO. Request was also made to move executive session to 30 minutes prior to the lunch.

*Region VIII East Director, Angela Johnson moved to approve the agenda as amended. **Motion Carried Unanimously***

## **CONSENT AGENDA**

President Garcia asked for approval of the consent agenda to include the following minutes:

- a. May 18, 2024 – Board Meeting DRAFT Minutes – Calgary, AB
- b. May 22, 2024 – Board Meeting DRAFT Minutes – Calgary, AB
- c. May 22, 2024 – Annual Business Meeting DRAFT Minutes – Calgary, AB
- d. July 25, 2024 -- Virtual Board Meeting DRAFT Minutes

Consent agenda was approved as distributed by unanimous consent.

## **FOUNDATION REPORT**

Verbal report was presented by Foundation President Buster Brown. Foundation member Shari Moore provided a list of the current fundraising opportunities available.

## **EXECUTIVE DIRECTOR UPDATE**

The report was presented by ED Shalby and the following updates and recommendations were made:

1. Honorary Membership – update was provided to Board regarding eligible honorary membership status of IIMC Past President Mary Lynne Stratta. ED Shalby will keep the Board apprised of any changes prior to 2025 conference in St. Louis.
2. Registered Agent State of Illinois – Current agent is Kittie Kopitke who is retiring in May 2025. New registered agent to be assigned to Sandie Maahs from Village of Davis Junction, IL.

*Region VII Director Margo Gray moved to approve Sandy Maahs, from the Village of Davis Junction, as new registered agent for IIMC. **Motion Carried Unanimously***

## **EDUCATION**

Education report was presented by Dr. Bea Rodriguez and Dr. Jai Ulrich with no action required.

## **COMMITTEE REPORTS – No Action**

The following committee reports requiring no action were accepted Conference, Education & Professional Development, International Relations, Membership/Mentoring, Policy, Public Relations/Marketing, Records Management, Research and Resource.

**RECESS** -- The meeting recessed at 9:40 a.m. and reconvened at 10:10 a.m.

### **ELECTION COMMITTEE – Action Required**

On behalf of the Election Committee, Region I Director Kathy Montejo moved to adopt the proposed amendments to Election Policy 2.20 as presented.

- Committee Recommendation #1: Approve changes to Exhibit A -- Policy 2.20  
**After discussion, the motion carried by a majority vote.**
- Committee Recommendation #2: Approve management's recommendation regarding a member survey about voting prior to the use of online voting platform –  
**After discussion, the motion to conduct a member survey carried by a majority vote.**
- Committee Recommendation #3: Approve the recommendation of the Election Committee and the Marketing and Public Relations Committee to implement the Count Down to Vote Campaign and use of social media blasts to remind members of the importance of voting, the deadlines and the new software. **After discussion, the motion carried by a majority vote.**
- Committee Recommendation #4: Authorize the Election Committee with assistance from IIMC Staff to hold a Candidate Forum following the deadline for submission of nominations to give candidates an opportunity to outline their vision and members the opportunity to educate themselves on the candidates. **After discussion, the motion was adopted.**
- Committee Recommendation #5: Approve the incorporation of Policy 2.20 into the Candidates Guide. **After discussion, the motion carried by a majority vote.**
- Committee Recommendation #6: Approve the Recommendation for a Standard Elections Complaint Process and authorize the Election Committee to develop a standard process and form. **Motion carried by majority vote.**
- Sub-Committee Recommendation: Director Jamie Newman moved to approve the recommendation to create a new Standing Committee on Ethical Standards starting in 2025. After discussion, an amendment to strike out the word “Standing” was adopted.
  - a. **A motion to take the vote by roll call carried.**
  - b. **The amended motion failed.**

Director Montejo moved to consider seriatim and review Chapter 2.20: ELECTIONS AND CAMPAIGNING section by section. **Motion Carried unanimously.**

Region XI Director Stephen Huycke recused himself from this topic as he is considering running for Vice President position in January 2025. Guest, Johannes Rijs also exited the room at this time.

- Exhibit B – Revised Campaigning Policy

Region IX Director Marc Donohue moved to eliminate item C in the policy. Director Donohue rescinded that motion and made a new motion to remove the word “endorse” from Item 2.20.030-Policy C to read as shown in red below. After discussion, a vote to remove the word “endorse” failed. A motion to approve the policy as is was passed **by a majority vote.**

#### **C. Ensure that elections are open and fair**

The Board must ensure that the election process remains open and fair. Favoritism – whether real or perceived -- is contrary to the goal of openness and fairness in elections. ~~Campaigning openly or behind the scenes for a candidate is not appropriate. Therefore, the Board, and individual Board members, shall not endorse, or~~ campaign (openly or behind the scenes privately) for any candidate. ~~or~~ Upon request by a candidate, the Board or individual Board members ~~and shall~~ provide opportunities for campaigning or electioneering ~~that is not~~ to all candidates for office. Therefore, ~~Campaigning openly or behind the scenes privately for a candidate is not appropriate allowed.~~ Members of the IIMC Election Committee are

not permitted to campaign openly or privately for any candidates.

Region III Director Tory Frink moved to refer the second paragraph of Policy 2.20.060 – Election – Region Directors back to Elections Committee for review to clarify process for fairness in case of two candidates from the same state when one state has two associations (municipal and county) and there is a disparity with one association having more voting members than the other association. **Motion Carried Unanimously.**

### **2.20.060 -- Election – Region Directors**

If there is one Region Director candidate, no election is held, and the candidate is declared elected. If there are two or more candidates, IIMC conducts a Region election. Regions that have established region and/or bylaws for nominations or an established rotation process for the Region Director position shall move their nominee forward after completing their selection process. IIMC shall conduct the election within regions and/or states that do not have established rules or are not able to put forward a nominee. If a region has an established rotation for states and the state has not selected a nominee, then only members of that state may vote. Region Members who are Full Members, Additional Full Members, Associate Members, Retired Members and Honorary Members are eligible to vote for Region Director. Election results are announced at the Annual Business Meeting.

If a state association has more than one qualified candidate vying for an IIMC Board position, it is up to the state association to conduct its own election. If the state association cannot support conducting its own election, it can request IIMC to assist in the process.

### **BUDGET AND PLANNING COMMITTEE – Action Required**

The report by Committee Chair, Barbara Blackard was presented by Board Liaisons, Mugford and Johnson. A description of the budget meeting process was presented to the Board for transparency. ED Shalby presented the following Budget Committee recommendations to the Board.

- Elections Committee requesting \$10,000 to hire company to conduct IIMC Vice President election to be revisited after survey is conducted of the membership regarding voter turnout.  
**Motion to approve carried unanimously.**
- \$13,500 budget for initial face to face meeting of Futures Committee to be held at HQ  
**Motion to approve carried unanimously.**
- 2025 Conference Registration Fee Increase of \$25.00 bringing registration fee to \$700.  
**Motion to approve carried unanimously.**
- 2025 Membership Dues increase of \$10.00  
**Motion to approve carried unanimously.**
- Staff Salary Increase of 5%  
**Motion to approve carried unanimously.**

**RECESS - The meeting recessed for lunch at 12:20pm and reconvened at 1:10pm**

## **FINANCIALS**

ED Shalby presented the 2024 Financial Managements Notes.

## **EXECUTIVE SESSION**

Motion was made to go into executive session at 11:30am. The meeting reconvened at 12:05pm

## **FINANCIALS continued**

ED Shalby continued the 2024 Financial Managements Notes. Board was asked if they wished a review from the Finance Specialist, Shannon Kane. Seeing financials were provided to the Board prior to the meeting no presentation was requested.

*Region VII Director Leesa Ross moved to approve the payment of \$13,000 for the Independent Investigation regarding the 2024 Annual Conference held in Calgary, AB, Canada. **Motion Carried Unanimously.***

## **EXECUTIVE SESSION**

Director Leesa Ross moved to go into executive session at 1:23pm. The meeting reconvened at 2:14pm

## **STAFF REPORTS – NO Action**

The communication report was presented by Communications Officer, Karen Lee.

The membership report was presented by Member Services Director, Janis Daudt and Associate Members Services Director Tammy Storrie.

Region XI update provided by ED Shalby.

*All non-action staff reports were accepted by the Board.*

## **2025 ANNUAL CONFERENCE – St. Louis, MO**

ED Shalby provided a verbal update on the 2025 conference venue. Conference theme is “Rockin and Rollin on the River.” All Conference Event will host a dress like your favorite rock star contest for free conference registration. Venue will be cashless, and several announcements will be made to ensure delegates are aware. Cardinals baseball team will be in town three of the nights of the conference. City has many amenities to offer with free admission to many attractions all within walking distance.

## **2028 ANNUAL CONFERENCE SITE SELECTION**

Blind Conference Proposal sheet was distributed and reviewed by the Board. Two cities were presented for selection. After discussion and vote by Board, City A was revealed to be Bellevue, WA, City B was Knoxville, TN.

*City A, Bellevue, WA was selected by majority vote.*

## **OTHER BUSINESS**

*The Board discussed the seating arrangement at the annual banquet to include returning the Board head table on stage, beginning with the 2025 conference. A motion to have the Board sit on stage and not on the floor passed.*

**ADJOURNMENT**

With no further business, the meeting adjourned at 3:30PM

Janet Pantaleon  
Parliamentarian/Recorder

DRAFT

**International Institute of Municipal Clerks**  
**Board of Directors Meeting**  
**Zoom Call**  
**December 9, 2024**

**Call to Order**

President Lisa Garcia called the zoom meeting of the IIMC Board of Directors to order at 9:00 a.m. MST.

President Garcia announced that she had asked Immediate Past President Hess to serve as Secretary/Parliamentarian for today's zoom call.

**Board Members Present:**

President Lisa Garcia, MMC

President-Elect Dawn Abrahamson, MMC

Vice President Lee Frazier, MMC

Immediate Past President Mary Ann Hess, MMC

Region I Directors: Kathleen Montejo, MMC; Kerri Parker, MMC

Region II Directors: Travis Morris, MMC

Region III Directors: Lori McWilliams, MMC; Tory Frink, MMC

Region IV Directors: Sherri Gard, MMC; Curtis Green, MMC

Region V Director: Carrie Mugford, CMC

Region VI Director: Elena Hilby, MMC; Trish Gleason, MMC

Region VII Directors: Margo Gray; Leesa Ross, MMC

Region VIII East Directors: Julie Barnett, MMC; Angela Johnson, MMC

Region VIII West Director: Colleen Mulvey, MMC; Ida Fierro, CMC

Region IX Directors: Jamie Newman, MMC; Marc Donohue, MMC

Region X Directors: Lana Antony, MMC; Stephen Huycke, CMC

Region XI Directors: Linda Larter, MBE; Arnout van Kooij, MMC

**Also Present:**

Attorney Rosa Cumare

On motion by Angie Johnson, seconded by Travis Morris, the agenda was unanimously approved as presented.

On motion by Curtis Green and seconded by Travis Morris, the motion to enter into executive session was unanimously approved.

On motion by Curtis Green and seconded by Elena Hilby, the Board voted to come out of Executive Session. Everyone present voted AYE.

On motion by Angie Johnson and seconded by Leesa Ross, the Board voted to approve the Close-out Report. Everyone present voted AYE.

**Adjournment**

With no objection, President Garcia declared the zoom meeting adjourned at 10:10 a.m. MST.

Respectfully Submitted,

Mary Ann Hess, Acting Recording Secretary

DRAFT

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Board of Directors  
**From:** Chris Shalby, Executive Director  
**Date:** April 12, 2025  
**Subject:** Executive Director's Year-End Report

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### ***Overview***

The following is a synopsis of each Department at Headquarters. At the end of this report, we have a recommendation regarding the Elections and Campaigning policy and process.

### **Staff Update**

IIMC is into its fifth year of having staff work a hybrid schedule from home/office with 50% of staff in-house with alternating days. Three staff members work out of state. We hold weekly virtual meetings and more as needed. Our productivity remains high, and the schedule has proved beneficial to staff in many ways.

### ***Personnel***

We have 10 full time staff, one part-time and 4 independent contractors: 1) Event Management; 2) International Consultant; 3) Parliamentarian; and 4) Information Technology. Our CPA/Financial Consultant is no longer an independent contractor, but used on as needed basis, reducing her annual salary, considerably.

### ***Administration***

Four staff members have been with the Organization for 15 or more years. Staff offers institutional history, knowledge, experience, a belief in IIMC's mission and an affinity toward the membership.

Janet Pantaleon has transitioned from Finance to Office Manager. She oversees most areas of Administration, Human Resources and works to maintain building and tenant maintenance. She will provide backup to Finance as our new part-time staff Shannon Kane is now overseeing the Finance Department. Janet will continue to coordinate the Conference's Opening Ceremony and take minutes at Board meetings. Marlena Hernandez has been in her Administrative Coordinator/Accounts Receivable position more than one and a half years, providing services in administration and finance and is cross-training in Conference areas including the Opening Ceremony.

### ***Marketing/Communications***

Our Director of Communications, Karen Lee, has been with us since March 2020. She has done an excellent job regarding member outreach, publications and engagement development. The Department is responsible for producing the following: the monthly online *News Digest*; marketing and collateral support to all Committees and IIMC in general; and the weekly *E-briefings*. **The Communications Department's report is part of this agenda and features current metrics on the IIMC website, E-Briefings and News Digest.**

**NOTE:** Moving into the 2026 budget year, we will look at the possibility of adding another staff member to this Department, pending budget.

## ED Update – Page 2

### ***Education***

The Department has been consistent in meeting members' educational needs and staying abreast of education guideline improvements. Hired in July 2020, Dr. Beatrice Rodriguez directs the Department and continues to immerse herself in IIMC's Education programs. In 2025, the Department created 23 online education courses, an increase of seven from the 2024 total of 16. These programs have generated additional revenue for IIMC, an ancillary and positive byproduct of professional development. Dr. Rodriguez continues to research new capacities of keeping professional development at the forefront of IIMC members. Associate Director of Professional Development Dr. Jaimis "Jai" Ulrich was hired in March 2022. Dr. Ulrich creates and oversees the conference education program regarding speakers and other logistics, the Athenian Dialogues, CMC and MMC applications as well as member outreach regarding certification. Dr. Ulrich has also visited several Institutes in 2024 and continues in 2025, presenting sessions and facilitating Q & A meetings regarding certification. Education Coordinator Iris Hill, who has been with IIMC since January 2019, assists members with the certification and application process, facilitates webinars regarding the Online Professional Development Program, reviews, processes and oversees the Paul Craig Athenian Fellow submittals and certificates, and maintains the Institute Directors' membership base as well as provide full administrative support with month-end reports. **The Education Department's report is part of this Agenda.**

### ***Membership***

The Department's membership campaign continues to garner new members with nearly 430 as of this writing. Janis Daudt and Tammy Storrie have been with IIMC since 1998 and 2003, respectively, and Stephanie Galarza (hired in March 2024) oversee this department's work. This group is exemplary when dealing with IIMC members daily, is constantly looking for new and creative ways to recruit new members and maintain current membership and oversees the Conference registration/exhibit hall areas. Their efforts helped make the 2024 year-end membership figures exceed the \$1 million mark, again, for the 17th consecutive year. **Please see the Department's report in this agenda.**

### ***Finance***

Our existing policies and processes over the past 17 years continue to steer us in a positive direction. We're diligent about administering the Organization's finances. 2024 was the 17th consecutive year (**2024 year-end financials are part of this agenda**) that IIMC produced a positive bottom line. Our Board Reserve Balance is \$2,419,301 as of (12/31/2024). IIMC's Board approved the hiring of Urban Wealth Management in April 2023 to oversee a portion of its investments to expedite financial growth.

**IIMC's 2024 year-end budget is \$39,813 in the positive, an increase of \$38,847 from the initial projection of \$966. A portion of the windfall was realized from education revenue, building revenue, membership dues, interest from Board reserves and a constant eye on expenses.**

Shannon Kane oversees the majority of our daily accounting tasks. In January 2025, Connie Parker, CPA, our financial consultant, who has been with IIMC for approximately nine years, has reduced her role with IIMC, also terminating her monthly contract, saving IIMC approximately \$48,000 annually in salary. She now works with us on an as needed basis. **As of this report, our year-end audit compilation is in progress and will be either emailed prior to the meeting or distributed at the meeting.**

## **ED Update – Page 3**

### **CONFERENCE -- 2025 Conference – St. Louis, MO**

We projected 650 Delegates/25 guests. As of this writing, we have 753 delegates, 37 Guest, 316 first timers, 169 from Region VII, of which 91 are from Missouri, for the 2025 Conference. With the addition of 100 more Delegates, we are projecting our bottom line to be in the positive (\$20,000) instead of our initial projected loss of \$1,805.

The average attendance numbers from Conferences in 2017, 2018, 2019, 2022, 2023 and 2024 is approximately 660 delegates. St. Louis' proximity is an attraction, considering it's less than eight hours drive from most states in and outside of its Region.

\*\*\*Please note that a high increase in conference costs affects the bottom line. High expenses can be attributed to the following 1) Conference APP is double the cost of past years; 2) increase in overall speaker costs; 3) food and beverage costs continue to rise; and 4) audio visual hovers around \$100,000 plus. Staff will continue to find ways of reducing costs prior to and during the conference.

**NOTE: At its 2025 midyear meeting, the Board approved a \$25 increase to Conference Delegate registration fees. This will help with the overall conference bottom line.**

**Host Hotel Hyatt Regency** – houses all delegates. Overflow hotel, the Drury, across the street was contracted in early 2025 and continues to accommodate IIMC delegates.

### **Hotel Room Block/Costs**

The Host Hotel -- **Hyatt Regency Hotel** -- \$165/night for single and double; with sales tax (17.9%) and 80% attrition. We have a total of 3,020 rooms contracted and will need 2,416 accumulative to avoid attrition. The Hyatt Regency sold out in early 2025, surpassing our numbers; therefore, we are not in attrition.

\*\*All Board meetings, education, general sessions, exhibit hall, lunches, refreshment breaks, opening ceremony, annual banquet and ABM are in the Hyatt Regency Hotel. The All-Conference Event will be held at the St. Louis Arch, a short walk from the Hyatt.

### **Conference Delegate/Guest Registration Fees - 2025**

The current fees are \$700 early bird for Delegates and \$315 for Guests.

### **Early Bird Package/Marketing**

**The Early Bird was Friday, March 14, 2025, to save \$50 on registration.** We believe an early bird date in March helps us with our marketing campaign. If the past conferences are any indication of members booking early, we will need this date to help us negotiate a second overflow hotel if the need arises.

- **Early Bird rate** - through March 14, 2025 – cost was \$700
- **After Early Bird** - March 15, 2025 – cost became \$750. Increasing the late fee helps spur delegates to register early, infusing IIMC with conference cash, an early indication of what our attendance numbers will be.

## **ED Update – Page 4**

### **Early Bird Package/Marketing – Recommended for 2025 Conference**

- The preliminary program was online in late 2024;
- The Education program was part of the online registration process, with Delegates being able to choose their concurrent education sessions (tracks) prior to the conference;
- Hotel online reservations became available to members in November/December 2024;
- The Conference Grant application period was September – November and recipients were selected by the Board in early December 2024; and
- This conference was promoted as a potential opportunity to earn 12 education points based on completing an assessment for each session attended. We believe these offerings were a definite factor in our numbers for St. Louis.

### **Rebates/Commissions Maximum**

The Hyatt is offering a 10% commission that will be divided between IIMC and YES (65% IIMC - 35% YES).

### **Total Commissions per occupied room block (miscellaneous conference revenue):**

- Hyatt Hotel \$25,911 as of this writing. This revenue could increase slightly due to total number of rooms occupied.

**NOTE:** Food costs are not always in our favor. Therefore, we do have the option of utilizing the entire F&B budget if needed, as opposed to a per person meal rate.

### **General Areas to note for St. Louis include:**

- Food and beverage can exceed \$200,000 with a minimum of \$100,000 guaranteed;
- Region X and XI travel due to national politics;
- Overflow hotel – the Drury - was able to provide rooms at the same rate as the host hotel;
- There is no meeting space cost.

### **Recommended Discounts and Savings**

Other discount programs that Management recommends continuing in 2025 include:

- Academy sessions are \$159 regardless of registering for one or more. We have 239 registered for the Academies in 2025. We have four Athenian Dialogues at \$110 per Dialogue and 53 participants.
- Offered a \$50 discount for a First Timer and/or Region VII delegates. We have 316 first timers and 169 from Region VII.
- Offer a one-year complimentary membership to Missouri Clerks who have never been IIMC members and that are registering for the conference for the first time.

## **ED Update – Page 5**

### ***Headquarter Building -- Update***

On November 1, 2022, we consolidated three rental offices into two as current tenant – Burga Law – has expanded, thus turning two spaces into one large unit. We signed a five-year lease with the option of an additional five years after 2027. Our other tenant began their three-year lease in August 2022. Both tenants' leases generate approximately \$5,734 in monthly income. IIMC's monthly mortgage is approximately \$2,900, leaving IIMC with a windfall of \$2,834.

**NOTE:** IIMC refinanced its Building in 2020, reducing the monthly mortgage from approximately \$5,000 to its current rate of \$2,900.

**NOTE #2:** 2024 – 2025 building repairs included: the roof, HQ and tenants air conditioning units replaced and new flooring at headquarters.

### **Management's Comments:**

We don't have any specific recommendations other than what is recommended in individual reports. However, we do suggest a thorough revision of the Elections and Campaigning policy and process proceeding into the 2025 and 2026 term. The Elections Committee, who did an outstanding job this year, should review all possible options regarding candidates and their campaigns, vetting process – rather than staff – and, perhaps, shortening all areas of the election cycle.

# INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS



**To:** IIMC Board of Directors

**From:** Bea Rodriguez Ed.D. Director of Professional Development  
Jaimis Ulrich Ed.D. Associate Director of Professional Development  
Iris Hill, Education Coordinator

**Date:** April 2, 2025

**Subject:** 2025 Education Department Annual Report

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Below is an overview of the Education Department's operations since the Midyear Board Meeting held in November 2024.

## Certification

The department continues to receive a steady number of both CMC and MMC certification applications, with a review time averaging 1–5 days. CMCs and MMCs awarded between 5/1/2024 and 4/2/2025.

REGION	CMCs Awarded	Total Active Members per Region	MM Cs Awarded	Total Active Members per Region	Combined Total CMC and MMC per Region YTD
Region I	35	327	7	102	429
Region II	13	278	6	104	382
Region III	84	500	40	327	827
Region IV	24	304	16	115	419
Region V	37	433	10	145	578
Region VI	12	202	2	59	261
Region VII	23	335	13	103	438
Region VIII East	26	338	8	85	423
Region VIII West	35	339	9	129	468
Region IX	102	500	25	308	808
Region X	5	78	1	14	92
Region XI	0	57	0	15	72

As of 4/2/2025, 32 members were pending certification (a 2-year membership requirement), and over 700 certificates and pins had been shipped to our awarded members (Kudos to Ms. Iris Hill!).

**CMCs and MMCs** – Since the Annual Board Meeting in May 2024, we have awarded **an additional 406 CMC designations and 138 MMC designations**

## Athenian Leadership Society

The Athenian Leadership Society has experienced substantial growth over the last three years, as evidenced by the increasing number of Fellows awarded.

<u>Year</u>	<u>Athenian Dialogues Held</u>	<u>Fellows Awarded</u>
2023	83	39
2024	105	53
2025	57 as of 4/2/2025	26

IIMC Region Directors are automatically notified once the Education Department has approved a new Athenian Fellow. Members continue to be notified immediately upon becoming a member of the Athenian Leadership Society, and an official congratulatory letter is distributed once the fellowship is achieved. The Award has officially been changed to the Paul Craig Athenian Fellow.

**Q & A with Dr. Jai** – While our bi-weekly virtual Q&A series has slowed, I've remained committed to supporting our members. With the help of Karen Lee, I have continued to offer **Region-specific Q&A sessions** focused on CMC and MMC certifications, ensuring that Clerks across all regions have access to timely guidance and support. In addition to these sessions and ongoing email support, I've also conducted **76 one-on-one scheduled counseling sessions** for CMC and MMC applicants—providing personalized, detailed guidance and ensuring our Clerk customer service remains truly **legendary**.

Dr. Ulrich will also be hosting a **fully booked Q&A session** during the 2025 Annual Conference, where attendees can receive real-time answers and insights to help them successfully navigate their certification journey.

## Proposal Submitted to the Education and Professional Development Committee (EPD)

Since our last Board report, the Education Department has continued exploring a potential shift from a points-based system to an hours-based framework. This proposal was developed in response to ongoing concerns about the current certification model, which many have found to be outdated and inequitable. The hours-based model is **not a predetermined outcome** but rather one possible solution aimed at aligning our processes more closely with standards in higher education and improving accessibility for our members.

In recent months, we have engaged in discussions with both the Education and Professional Development Committee (EPD) and the Institute Director (ID) liaison to review the proposal and gather critical input. Details from these conversations can be found in the EPD Committee report, with additional insights provided by Dr. Rodriguez below.

To ensure this work is informed by member experience, a second survey—designed with support from our Research Committee—was distributed to CMC and MMC candidates in progress. This survey employed a **mixed-methods approach**, blending qualitative and quantitative questions. We've received nearly **400 responses**, and I am currently in the process of disaggregating the data to better understand the needs, barriers, and suggestions shared by our membership.

## 2025 IIMC Conference in St. Louis

### Conference Design:

We are thrilled to announce that the 2025 IIMC Annual Conference in St. Louis offers one of the most comprehensive educational opportunities to date. Recognizing the ongoing challenges faced by our members, we have intentionally crafted a diverse and engaging program designed to appeal to a broad audience. In response to past feedback, this year's conference features thoughtfully spaced scheduling to reduce fatigue and allow more time for meaningful networking between sessions. Our goal is to ensure members can engage deeply in each session without feeling rushed or overwhelmed.

**Building on the positive feedback received, we are continuing with our education tracks initiative.** Each track contains approximately five courses and is designed to ensure consistency in content across sessions, allowing attendees to focus on their growth and learning throughout the week.

### Conference Content:

The 2025 St. Louis Conference program includes:

- 8 Academy sessions (pre-conference)
- 4 Athenian Dialogues (pre-conference)
- 2 General sessions (conference)
- 7 Educational tracks

### Offsite Education

We are continuing to explore innovative and experiential learning opportunities that extend beyond the traditional classroom setting. **Whenever there is an opportunity to secure an offsite educational experience that ensures equitable access for all members, it remains a central focus in our decision-making.**

This year, we have **intentionally designed the conference schedule and educational tracks to allow additional time** for members to step outside the formal sessions and explore their surroundings. Whether visiting a local **City Hall**, exploring a **museum**, or simply engaging in meaningful conversations in a **new environment**, we believe these cultural experiences offer invaluable opportunities for growth and perspective.

Research consistently supports that learning does not only occur within the confines of four walls—it **happens through immersion, interaction, and exposure to new spaces and people**. These moments provide Clerks with unique insights into the communities they serve and foster deeper connections with the world around them

### Registration:

Online registration remains in place and has been streamlined for ease of access.

### Tracks:

Each track offers similar, high-quality content, ensuring attendees receive a robust and equitable educational experience no matter which sessions they attend. The primary choice for registrants is selecting their preferred starting point for the week. From there, each individual's schedule is crafted to follow a logical, progressive path aligned with the overall curriculum goals.

### **Speakers:**

All speakers have been carefully reviewed and selected based on their expertise, impact, and relevance to the Municipal Clerk profession. Our 2025 speaker lineup includes academy instructors, Athenian dialogue facilitators, keynote speakers, and session presenters—each bringing their dynamic perspective to public service and leadership development.

### **Conference App:**

Once again, we are using the Whova app, which has been highly successful in driving engagement and organization for attendees. Features such as networking, personalized agendas, and session updates will be fully integrated.

### **Conference Assessments:**

We will continue to utilize **FlexiQuiz** for assessments and certificate tracking. This platform ensures immediate digital access to certificates and real-time submission for certification credit. It is seamlessly integrated with the Whova app for a smooth and paper-free experience.

### **National Presence and Professional Contributions**

In 2025, I had the privilege of expanding my presence across several key municipal clerk associations nationwide. On **January 24, 2025**, I was honored to serve as a guest and deliver the

**Keynote Address** for the **Virginia Municipal Clerks Association** titled “*The Triple Path of Leadership: Lead, Follow, Serve.*”

Looking ahead, I will continue contributing to clerk education across the country:

- **May 18, 2025** – Teaching an Academy session at the IIMC Annual Conference: “*Not Re-Inventing but Re-Imagining the Wheel: ChatGPT for Local Government.*”
- **June 20, 2025** – Presenting the same session for the **Northwest Clerks Institute**.
- **July 14, 2025** – Teaching “*Courageous Leadership for Municipal Clerks*” at the **Ohio Municipal Clerks Association Conference**.
- **August 19, 2025** – Leading a session on “*Aligning Mind, Body, and Spirit for Authentic Leadership in Local Government*” at the **Wisconsin Municipal Clerks Association Conference**.
- **September 2025** – Facilitating a full-day training for **Region VII**, titled “*Building and Cultivating Stronger Relationships in Local Government*” and “*Maintaining Mental Health and Wellness.*”
- **October 2025** – Hosting an in-person **Certification Q&A** session for the **Florida Association of City Clerks**.

### **IIMC Institutes**

**Illinois** – no contract for institute – attending Wisconsin Institute

**New York** – no contract for institute – attending Connecticut Institute

**Nevada** – No contract for the institute.

**ID Turnover** – Currently, Institute Directors continue to turn over:

**Delaware** – **Joy Jordan**

**Arizona** – **Michelle Hill**

**New México** **Rebecca Martinez** -

**Kansas** – **Jamie Buster**

**Missouri** – **Contemplating a change**

Iris Hill provides substantial support in assisting Dr. Rodriguez with updating Institute Director contact information, as it often changes rapidly. She also helps with the Annual Institute Reports regarding compliance correspondence after review and by updating the IIMC Institute page in collaboration with the IDs and as needed.

### **2025 Conference Grant Applications**

Dr. Jai and Iris Hill helped the IIMC Foundation facilitate 16 Conference Grants. Regions 1, 4, 10, and 11 did not submit any applications. The goal is to grant 2 per region every year.

### **Course Review Process**

Course reviews continue to arrive weekly, and the department works with each association to ensure that high-quality education programs are offered locally. There has also been a noticeable turnover of the state association leadership marked by incorrectly submitted content forms and a general misunderstanding of the process.

**2025 Online Professional Development Program** - The program remains highly successful. If members cannot attend the live session, they can now participate in our online asynchronous program via Captus Press under our Online Learning Opportunities. This year, we have presented twenty-four robust courses with a wide range of topics for the members. Iris Hill, Education Coordinator, manages the entirety of this program exceptionally, and members appreciate her engagement and immediate response to their feedback and needs.

**Education P.L.U.S. Program**—This program was successfully launched in July 2023, and new resources are available on the IIMC website. The first cohort's participation in EPP will be completed on July 31, 2025. The Education team is preparing for these submissions. Dr. Rodriguez shortened the review time from six months to three months, and a new schedule has been posted on the education page of the IIMC website.

**EPP with Dr. Bea and Dr. Jai** — Dr. Rodriguez and Dr. Jai hosted two sessions on April 23, 2025, to address final inquiries from individuals in the first EPP cohort. After feedback and consideration, the Education Department has reduced the application review time for this program from six months to three months. The new and next enrollment date for this program is November 1, 2025.

**Institute Director Liaison—Tanner Vario**, the Institute Director from Southern Utah University, has been very active in participating in meetings with the Education and Professional Development Committee and has brought the Institute Directors' perspective, comments, and feedback (please see attached ID comments). He continues to be a collaborative partner, colleague and mentor to his peers, making himself available while continuing to operate his institute.

### **Committee Work**

**Education and Professional Development Committee** - The Education and Professional Development (EPD) Committee members met on October 15, 2024, and introduced Tanner Vario as the newly appointed Institute Director Liaison and discussed his purpose for being present and how he will close the communication gap between the committee, IIMC Education team and Institute Directors. Institute Directors have been requesting a seat at the table for some time now. Dr. Ulrich and Dr. Rodriguez concur that building stronger relationships with Institute

Directors is imperative to the collaborative process as we move forward. We also updated the committee on the previous committee's direction of the points-to-hours proposal with Dr. Jai.

Tanner Vario provided the EPD Committee Chair, Angila Bains, with a letter from the Institute Directors to the EPD commenting on Points versus Contact Hours, EPP Program Participation, and Clerk Membership Requirements. Please refer to the EPD Committee report for further information. Committee members were encouraged to comment on the correspondence, and Dr. Rodriguez agreed to capture those comments via a link sent to each member. Below are the comments of those who used the link. Not all committee members responded to our call for feedback (NOTE: The EPD Committee report may reflect more or less):

**Tracy Borst, MMC Member** [tborst@thetfordvt.gov](mailto:tborst@thetfordvt.gov)

"Hi everyone, I certainly have thoughts on this topic. Points vs Contact Hours will be a blow to institutes, who have been a strong piece for, to, and of IIMC. I have deep respect for the experience of IIMC Directors and hope they are heard. I am very eager to hear the response and look forward to a group discussion."

**Maryanne Girard, MMC Member** [girardm@cityofcrestview.org](mailto:girardm@cityofcrestview.org)

"For context, I earned my Register Municipal Clerk and Certified Municipal Clerk designations from the State of Illinois in 2001, followed by my Master Municipal Clerk designation in 2007. These credentials, overseen by IIMC, were recognized as strong professional standards by my colleagues. The designations were based on a clearly structured point system, leaving no room for ambiguity. Gaining points through participation in the local Institute was not only educationally valuable but also provided invaluable networking opportunities. I was a strong advocate for a post-MMC program, though I envisioned it being structured around continuing education units. This approach would ensure that municipal clerks continue to derive value from attending conferences. I am a strong proponent to life-long learning. I also believe that maintaining requirements for full membership, particularly in at least four of the core responsibilities, is essential to preserving our professional standards. Quality should always be prioritized over quantity.

**Krystal Gonchar, CMC Member** [kgonchar@uaoh.net](mailto:kgonchar@uaoh.net)

"I disagree with the mandate that a percentage of points/contact hours must be earned from local institutes. When looking at requirements for other types of certifications, I am not finding examples where this is done, and do not see the value in it. For example, check out American Planning Association's structure. Also, arguments can be made against the idea that clerks would opt to attend institutes outside of their local region, thereby reducing attendance in their own. Many clerks have limited professional development funds to cover costs of travel, etc. I would guess that reason alone would limit how often and how far they can travel. But even if they do, if a clerk is searching for opportunities to earn points towards their certification, they should have the freedom to take courses wherever they are able. If IIMC moves to a different points structure, I would rather see a difference in the number of points based on topics. For example, if a clerk attends a 2 hour training on HR matters, such as writing employee performance evaluations, which is directly related to our job, then that should receive 2 credits. If a clerk attends a 2 hour training on yoga in the workplace, that may be helpful as a worker but not related to the clerk role, then that should receive 1 credit. Other certifications, such as fiscal officers, attorneys, city planners, must maintain their certification by attending continuing education. I am not opposed to the idea of CMC and MMC holders

maintaining certification by attending X number of hours within X amount of time, but that number should be reasonable, like other organizations." I appreciate the opportunity to share these thoughts and believe you're doing an excellent job in fostering dialogue around these important issues."

**Aimee Nemer [aimee.nemer@cor.gov](mailto:aimee.nemer@cor.gov) 03/20/2025**

"I don't know if I have a strong opinion in favor or opposed to contact hours, but a percentage model seems like a good compromise. Regarding the EPP program, I was very much in favor of some form of a continuing education program after the MMC when this discussion was originally started. However, I don't know that there has been much focus, information, or publicity about the program rolled out. I apologize if I have missed it, which is entirely possible. If the program is not meeting expectations, I agree that a review is needed - but it could just be that more communication and explanation about the program is needed. I prefer to keep the core duty requirements for membership as stated currently. Thank you for the opportunity for feedback - and creating this format!"

**Ida M Fierro [ifierro@tobnm.gov](mailto:ifierro@tobnm.gov) 03/20/2025**

"I prefer the point system. EPP is great for those that would like to further their education. Clerk Membership should continue to be a requirement. "

**Elizabeth Garcia Beckford [beckford05@gmail.com](mailto:beckford05@gmail.com) 03/24/25**

"I agree that maintaining connection to institutes is critical. I am in favor of maintaining a continued professional level of education and development that includes a point system earned by participation with a local institute and attending conferences. Membership should be a component. I do think that there is also value in contact hours that can be included but limited in the percentage/ amount of hours that can be applied towards credit. Perhaps, Clerks that have earned their MMC designation should be automatically enrolled in the EPP program when they sign up to attend conferences. Also, moving forward, new members or those members that have not earned their designations can have enrollment in the certification programs automatically included towards achieving the different levels of designations, (CMC, MMC, EPP,) as part of their membership to maintain a professional standard. I agree that reconsidering the current requirements for Full Membership needs review especially if the member holds the title of ""City Clerk/ Town Clerk"" and they can provide a letter from their respective municipality attesting to their position/ role. "

**Marne McGrath [clerk@islamorada.fl.us](mailto:clerk@islamorada.fl.us) 03/21/25**

"Moving to a contact hours system could cause clerks to choose their educational opportunities based on number of hours rather than the content of the program. This could reduce participation in state institutes in favor of 'more bang for your buck' at IIMC conferences. As the point system requires proof of comprehension in the form of post-attendance quizzes and essays, a contact hours system using that criterion alone could undermine comprehension levels. Given a long enough time frame the level of expertise in the profession could be negatively impacted. With the demands of the profession and the overall lack of understanding of what clerks do, we don't need less education, but more and to be able to demonstrate our knowledge - as we train for under the point system. Another clerk mentioned the idea of automatically enrolling MMCs into the EPP program. I think that may be a good way to promote the program and increase participation. However, unless more institutes offer EPP programming this may not be

feasible. Opening the membership to clerking staff who perform less than four duties is potentially a good way to recruit new members, but at what cost? I do recognize that duty-specific clerks are performing instrumental duties and do contribute to the function of the clerk's office. Perhaps a percentage ranking and a more stringent membership criteria could compensate for less than four duties. If someone has received specialized training that overlaps with clerks who perform the four duties, that could also be taken into consideration."

**No Comment Available:**

Angila Bains – Chair  
Joelle Fockler, Vice Chair  
Amy Bellardo  
Johnathan Bourne  
Dale Forde  
Anastasia Gonstead  
Karen Mowad  
Aimee Nemer  
Teresa Saeed  
Linda Troyan  
Curtis Green  
Elena Hilby

**Management Comments:**

The Department provides support for all things education. In 2024 and continuing in 2025, the Department's online courses have generated much needed revenue toward the projected budgets. Regarding the points vs. hours discussion for Regions I through IX, the research continues with no immediate timeline to launch. IIMC needs to have fully vested participants to formulate a new approach prior to any further discussions with the Board. The recommendation will come after the Department has exhausted all possible progressions to ensure all entities are satisfied with this course of action.

IIMC's Education team has visited several Institutes and Association conferences and will continue to do so throughout the year.

Institutes and Institute Directors continue to be in flux with more and more entities demanding revenue generation to the forefront. IIMC's online courses have positioned the Organization not only toward gaining revenue but has helped members achieve points toward certification.

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Board of Directors  
**From:** Tom van der Hoven  
Region XI Development Consultant  
**Date:** April 14, 2025  
**Subject:** Region XI Consultant Report Development -- 2025/26



The purpose of my report is to inform the Board of the focus of my work as Region XI Development Consultant in 2024/25 and to seek the Board's input and support.

### **Background:**

This is my seventeenth report to the Board and follows on from the background and role explained in previous reports.

### The Role

To work closely with Region XI Directors, IIMC staff and the International Relations Committee.

Key objectives are to:

- Significantly grow membership of IIMC Region XI;
- Generate regular communications between IIMC, Region XI Directors and Region XI members which supplements and complements the material provided by IIMC;
- Commission and create value added material, products and services which members will regard as a member benefit; and
- Organize meetings and events in Region XI both to support the growth and development of region XI and as an additional benefit to IIMC members in region XI and other regions.

### Structure.

The way we work in Region XI is through a Management Board comprised of a representative of each of the associations together with the two Region Directors and myself.

The Board is the main decision-making body in Region XI and acts in the collective interests of IIMC members. We aim to meet at least 3 times per year – the last meeting was held in December 2024. The next meeting will be held in St Louis.

It is at these meetings that associations raise their needs and what they expect from their membership of IIMC but also in working collectively. Saying that, it does not prohibit any association from discussions directly with IIMC on their specific needs or to work with another association.

### Communication

Communication has always been, and will always be, a priority in Region XI. It is a challenge to engender a feeling of unity in a single region amongst associations in different countries and without a common language. The regular newsletter is our vehicle to share experiences and good practice. However, virtual meetings have been easier to organize and for more members to attend. The last newsletter was produced in July 2024 and the next one is scheduled to be published following the annual conference in St Louis.

### Membership

A key objective of my role is to generate membership growth in Region XI. The revised bulk membership scheme agreed by the Board grew IIMC's total Region XI membership and it currently stands at over 5,400 members.

We need to focus on how to retain those members and to provide them with services and products that will serve their needs. The challenge will be in finding out what they expect from their membership as it will differ from association to association – one size does not fit all.

#### Facilitated Zoom Discussions and Interviews

Members will be aware of the facilitated discussions held in 2020 and 2021. Feedback on these sessions were overwhelmingly positive. We hosted a virtual launch of the International Buddy scheme in 2022, and this resulted in a number of new buddy pairs. Further sessions will be held when suitable topics are identified.

#### 2025 IIMC Region XI Symposium and Study Tour

Just to remind members, the Study Abroad Tour and the Symposium are two separate events, The Study Tour is financed entirely by those that register and pay to go on it. There is no sponsorship funding or contributions from IIMC. IIMC however financially supports the two-day Symposium – in 2023 the contribution to the VVG was \$20,000.

The Association of Democratic Services Officers in the UK (ADSO) offered to host the 2025 International Symposium as part of their annual conference in Liverpool, England on September 11 and 12, 2025.

This promises to be another excellent event and an opportunity for our members to share experiences with colleagues from across the world. The draft program is attached. To this report. We are working closely with ADSO on this.

John Austin will step down as Chair of ADSO at the conclusion of their conference at which point Peter Sass from Richmond and Wandsworth Councils will take over.

As has been the practice in 2019 and 2023, Executive Director Shalby and I have put together a study tour that will join the Symposium at the end of the tour. The program is attached at the end of the report. So far 28 members have registered, Although the deadline to register has passed, we hope to register a couple more members at the conference in St Louis.

#### Focus for 2024/25

The Region XI Management Board met in Dec 2024 and at its meeting reviewed the Region XI Strategy – an updated copy is attached to this report.

#### **Recommendation:**

Members of the IIMC Board are invited to comment on the report.

**Management's Comments:** We are very appreciative of Tom's involvement in helping guide the Region. Since we've created this position, Region XI has grown in engagement, membership and the sharing of ideas and networking via the Study Abroad/Symposium Programs as well as the creation of the Region XI Management Board. IIMC's Study Abroad Programs have been in effect since 2008. Since Tom's involvement, we have incorporated the Symposium aspect to them, providing classroom education as well as sharing in the division of responsibilities.



## ADSO Annual Conference and Awards and IIMC International Symposium 2025

**Hilton Liverpool City Centre  
3 Thomas Steers Way, Liverpool, L1 8LW**

**\*Day 1 Programme – Thursday 11 September 2025**

10.45	<b>Arrival, Registration and Meet the Sponsors</b> Refreshments available	Foyer
11:00	<b>Welcome to first time attendees and meet your regional representative</b> John Austin - ADSO Chair & ADSO Regional Representatives	Breakout room
11: 20	<b>Conference welcome</b> John Austin – ADSO Chair	Grace Suite
11.45	<b>Plenary</b> Sue Gray - Baroness Gray of Tottenham	Grace Suite
12:45	<b>Presentation from ADSO's Gold Sponsor</b>	Grace Suite
12:50	<b>Lunch</b>	Foyer
13:50	<b>Workshops</b> 1. Working in a Modern Democracy - Carl Whistlecraft, ADSO Non-Executive Director & Diane Sims, ADSO Director of Communications 2. The new standards framework – Paul Hoey, HoeyAinscough Associates 3. Career Development for Senior DSOs - Rachael Morris, Penna & Susan Biddle, ADSO Director of Training 4. ADSO Team of the Year 2024 – London Borough of Barnet	Breakout rooms

15:00	<b>Refreshments</b>	Foyer
15:30	<b>Plenary - The Liverpool Improvement Story</b> Jacqui McKinlay – Chief Operating Officer – Liverpool City Council	Grace Suite
16:30	<b>Closing Remarks</b> John Austin, ADSO Chair	Grace Suite
18.30	<b>Drinks Reception and raffle</b>	Foyer
19:00 -12:00	<b>Dinner, Awards &amp; Live music (The Cheatles)</b> <i>Imagine area open until early hours with bar &amp; music</i>	Grace Suite <i>/Imagine</i>

**\*Day 2 Programme – Friday 12 September 2025**

9:30	<b>Arrival and tea and coffee</b>	Foyer
10:00	<b>Question Time Panel</b>  <b>Chair: Peter Stanyon, Chief Executive, Association of Electoral Administrators (AEA)</b> 3 panel members	Grace Suite
11.15	<b>Refreshments</b>	Foyer
11.45	<b>Facilitated Discussions</b> <ul style="list-style-type: none"> <li>• Open Surgery: Ask the experts</li> <li>• Citizen Engagement</li> <li>• Future of the Civic function – Tracy Frisby, NACO</li> </ul> Plus 2 other options	Breakout rooms
12:45	<b>Lunch</b>	Foyer
13:30	<b>Workshops</b> <ol style="list-style-type: none"> <li>5. Remote Meetings</li> <li>6. Local Government Reorganisation - Philip McCourt, Bevan Brittan</li> </ol>	Breakout rooms

	7. Artificial Intelligence  8. What has Scrutiny ever done for us? - Mel Stevens, CfGS	
14:45	<b>On the go refreshments</b>	Foyer
15:00	<b>Plenary session – Conference roundup:</b> - Feedback on conference sessions - Conference 2026 - Prize draw of a free 2026 delegate place for those in attendance at this session	Grace Suite
15:30	<b>Closing Remarks &amp; Departure</b> Peter Sass, ADSO Chair	Grace Suite

**\* subject to amendment**

# 2025 IIMC Study Abroad Program and Symposium - England

September 6 – 12, 2025



Windsor



Stratford-Upon-Avon



Liverpool Skyline



# 2025 IIMC Study Abroad Program and Symposium - England

## September 2025 - TENTATIVE SCHEDULE

*CMC Education or MMC Education points with the completion of the required learning assessment will be provided in future updates.*



Windsor



Stratford-Upon-Avon



Chester



Liverpool

The 2025 IIMC Study Abroad Program and Symposium, in conjunction with the Association of Democratic Services Officers (ADSO) offer IIMC members an opportunity to explore iconic English towns – Windsor, Stratford-Upon-Avon, Chester and the City of Liverpool – hometown of the Beatles. It is also an opportunity to network with IIMC's international members. The Symposium will feature renowned speakers and education. It is an excellent opportunity to bring together IIMC's Global Community to share experiences and knowledge.

The tour will begin in Windsor, continue to Stratford-Upon-Avon and conclude at the 2-day Symposium in Liverpool.

**NOTE\*\*\*** Study Abroad Program and Symposium participants will need to make their own travel arrangements to London's Heathrow International Airport and return trip home. Study Abroad Participants' registration will include the 2025 Symposium.

### Study/Symposium Program Five-Day Schedule

- **Saturday** Travel day - Participants will need to arrive at the Hotel in Windsor (20 minutes outside of London) by early afternoon on Saturday.
- **Sunday** Participants explore Windsor and London on their own before returning to Windsor late afternoon.
- **Monday** Participants depart by bus to Stratford-upon-Avon. Explore Stratford followed by a medieval banquet at Warwick Castle.
- **Tuesday** Participants will depart for Liverpool via Chester along the way.
- **Wednesday** Participants will explore Liverpool and environs. More details to follow.
- **Thursday** Symposium
- **Friday** Symposium
- **Saturday** Travel Day if you're returning home or on your own

*The following are brief descriptions of each city. The daily schedule may change slightly.*

### Saturday and Sunday - Windsor

Windsor is a historic town and is widely known as the site of Windsor Castle, one of the official residences of the British Royal Family. The town is situated 21 miles from central London. Participants will meet here on Saturday evening for an informal introductory reception and dinner in the hotel. Some may want to consider attending Evensong in St. George's Chapel at Windsor Castle.

On Sunday explore Windsor/London on own. Meet as a group for dinner.



Windsor Castle

# 2025 IIMC Study Abroad Program and Symposium - England

## Monday – Stratford-Upon-Avon

Stratford-Upon-Avon, a medieval market town in England's West Midlands, is the 16th-century birthplace of William Shakespeare. Possibly the most famous writer in the English language, Shakespeare is known for his sonnets and plays such as 'Romeo and Juliet' and 'Hamlet'. The Royal Shakespeare Company performs his plays in the Royal Shakespeare Theatre and adjacent Swan Theatre on the banks of the River Avon.

Dinner that evening will be a medieval banquet (tbc) at Warwick Castle. Warwick Castle is a medieval castle developed from a wooden fort, originally built by William the Conqueror during 1068



## Tuesday - Chester 11:00 am to 4:00 pm and then Liverpool

Chester is a city in northwest England, founded as a Roman fortress in the 1st century A.D. It's known for its extensive Roman walls made of local red sandstone. In the old city, the Rows is a shopping district distinguished by 2-level covered arcades and Tudor-style half-timber buildings.

Participants will travel to Liverpool and check into hotel in Liverpool. Dinner will be in the hotel (tbc)

## Wednesday – Liverpool

Liverpool is a maritime city in northwest England, where the River Mersey meets the Irish Sea. A key trade and migration port from the 18th to the early 20th centuries, it's also, famously, the hometown of The Beatles.



## Thursday – Liverpool (Symposium)

The Symposium will begin today from 8 am to 5:30 pm. More details to follow.

## Friday – Liverpool

The Symposium concludes today around 4 pm. Participants can stay at the hotel until they depart back home. Dinner on own.

## Saturday – Travel Day

Participants must make their own flight arrangements home. There are several options from Liverpool: Manchester Airport is 36 miles; Birmingham Airport is 110 miles, Heathrow is approximately 110 miles.



## IIMC 2025 Study Abroad Program and Symposium

Windsor • Stratford-upon-Avon • Liverpool

**Deadline: TBD**



**Cost of Study Abroad and Symposium Program Package includes:**

- 2 nights Hotel Accommodations in Windsor
- 1 night hotel accommodations in Stratford-upon-Avon
- 4 nights hotel accommodations in Liverpool
- Cost of Symposium Conference Registration and banquet at Warwick Castle
- 6 Breakfasts – Sunday to Friday
- 2 Lunches at Symposium
- 5 Dinners
- Deluxe transportation
- Admission fees - Program related
- Gratuities and all taxes.

**Costs: \$3,000 US per person – single/double accommodations**

*A minimum of 30 people is required.*

# Shop Until You Drop...

For more information regarding the Study Abroad Program and Symposium, please refer to future E-briefings, News Digests and the IIMC Website at [www.iimc.com](http://www.iimc.com)



## Windsor Royal Shopping

Opposite Windsor Castle, in the Grade II listed Victorian railway station, Windsor Royal Shopping is undoubtedly worth a visit. Not only is the structure itself stunningly unique, but the cultural hub is practically bursting with independent and well-loved shops and eateries.

## Shopping in Chester

On Chester's unique Rows, past meets present - you'll find England's oldest shop front alongside some of the most exciting independent shops, restaurants, cafes and bars on the Chester scene.



Pedestrian Mall in Liverpool shopping area



Association of  
Democratic Services  
Officers





## IIMC REGION XI STRATEGY

Version 2024

### IIMC

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.

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

**IIMC divides its organisation representation into eleven regions.**

### Region XI Members

IIMC members of Region XI (outside North America) includes Australia, Belgium, Bulgaria, Israel, Nepal, The Netherlands, New Zealand, South Africa and the United Kingdom (Bermuda, England, Scotland and Wales).

This is an agreed working document setting out the aims and aspirations for Region XI Members.

Ref	Topic	Timescale	Progress	Revised Timescale	Comment
1	Educational Alignment of International Qualifications	April 2024	December 2023 Progressive and constructive meeting took place between IIMC Education Dept and Region XI Board.  Further discussion to take place between educational representatives.		Top Priority
2	CMC & MMC Certificates	Ongoing	Encourage and enable more Clerks from Region XI to obtain Certificates.		May be dependent on 1 above.  Would be good to try and keep a running total.  Provide more information on these qualifications and promote within the Region
3	Athenium Dialogues outside USA	Sept 2024	VVG has an accredited Facilitator LL with SLLC colleague reviewing options to provide within UK. – could be subject to 1 above.		To enable a UK Facilitator may be dependent on 1 above.  The aim should be to provide these dialogues throughout Region XI.
4	Sharing Knowledge	Ongoing	LL attended VVG Conference 2023, Relating to Civility & Respect. Subsequently Dutch Home Office		

			attended various meetings in UK and SLCC Conference on same topic.		
5	Membership of Region XI  Review opportunities to increase membership from other countries	Ongoing			
6	Symposium 2025	2025	Agreement of IIMC Board to accept the invitation from ADSO to do a joint Symposium/Conference with them in 2025. Location and dates still to be determined by ADSO Board.		The dates have now been agreed by ADSO and the event will take place on 1th and 12 <sup>th</sup> September 2025 in Liverpool, England.
7	Marketing & Promotion	Ongoing	Promote and raise awareness of IIMC and its opportunities to Clerks throughout Region XI		Learn from each other and share what we are doing within our own associations
8	Board XI Region meetings – In Person	Ongoing	Try to arrange at least one in person meeting per year.		
9	International Buddy System	Ongoing	Review and re-promote.		Consider a change of name and online exchanges
10	Personal Resilience and 'self-care'	Ongoing	Share information and how we are supporting our members on this important issue		
11	Review priority of topics	Ongoing			

12	Region XI involvement with international IIMC events	Ongoing	<p>Forward and liaise with IIMC Board about increased involvement of Region XI.</p>		<p>Ideas as per Tine Vervisch email 26.2.24:</p> <p><i>Region XI in the picture</i></p> <ul style="list-style-type: none"> <li>• <i>An item in the IIMC-newsletter about what is happening in Region XI (not only events)</i></li> <li>• <i>Region XI provides a workshop every conference. The workshop is given by members of Region XI. Region XI takes a decision about the topics and speakers.</i></li> </ul> <p><i>IIMC for Region XI</i></p> <ul style="list-style-type: none"> <li>• <i>A study abroad for members of Region XI – in combination with the annual conference</i></li> <li>• <i>Visits (city hall, projects,...) as part of the program of the annual conference (like what was done 10 years ago)</i></li> <li>• <i>A (online) buddy exchange program</i></li> <li>• <i>Online learning is open for members of Region XI (we already talked about this with you)</i></li> </ul> <p><i>IIMC in the picture for members of Region XI</i></p> <ul style="list-style-type: none"> <li>• <i>Articles in the newsletter of Region XI: what can IIMC do for you?</i></li> <li>• <i>A separate newsletter from IIMC for Region XI with interesting articles, videos,...</i></li> </ul>
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13	Attendance of Clerks from developing countries to be involved and attend conferences	Ongoing	Encourage efforts to enable attendance of Clerks from developing countries to be involved and attend conferences		Two grants per region are made available by IIMC to assist with conference registration.
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# INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To: IIMC Board of Directors**

**From: Helen Ingold, Chair**

**Date: March 21, 2025**

**Subject: 2025 Conference Annual Report**

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## **Background:**

The Conference committee is charged with reviewing and recommending conference discussion topics, speakers, sessions, and general session speakers, and work with staff in reviewing the overall conference design and how to improve upon existing formats.

## **2025 Objectives:**

1. Ensure that the educational needs of all IIMC members, considering their varying levels of education, experience, and job responsibilities, are adequately addressed. Any recommendations in this regard will be forwarded to the Education Department as necessary.
2. Recommend education topics and presenters for the Annual Conference to the Education Department by July 1, 2024.
3. Collaborate with the Executive Director in reviewing future conference submissions and providing pertinent information to the Board of Directors.
4. Working with staff, review and revise the current Conference Planning Manual, ensuring it coincides with today's conference planning, fundraising and logistics.

## **Committee Activities**

The committee met twice during the 2024-2025 term and:

- reviewed speaker applications and provided individual rankings to the Education Department, and
- reviewed applications to host the 2028 conference and provided recommendations.

Chair Ingold has been tracking the Conference Planning Manual against the current practices and noting sections to update. The formal review and revise of the Conference Planning Manual will be undertaken by next year's conference committee.

**Financial:** None required.

## **Summary:**

Please note the date to recommend topics and speakers needs to be adjusted as the list for the committee to review isn't sent to the conference committee until after July 1<sup>st</sup>.

## **Management's Comments:**

We appreciate the Committee's participation in helping IIMC's Education Department select the speakers and keynote for the 2025 Conference. We look forward to the Committee working with the Education Department on the 2026 Conference education program as well as helping in the 2029 Conference selection process. Lastly, the Conference Planning Manual needs revisions and we welcome those by the Committee.

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** **Board of Directors**  
**From:** **Angila Bains, CMC, Chair**  
**Date:** **April 1, 2025**  
**Subject:** **2025 Education & Professional Development Annual Report**

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### **Background:**

Please find some comments from the most recent Institute Director exchange meeting for your consideration and to share with the EPD committee and further IIMC Board of Directors. These comments and suggestions come from Institute Directors and provide feedback on three areas that have come up repeatedly for Institute Directors.

### **1. Points vs. Contact Hours**

Many IDs are concerned that moving to a contact hours system could unintentionally devalue Institutes by removing the incentive for clerks to attend their local education programs. This concern has come up before (such as last year in Calgary), but no concrete solutions were proposed and it was more complaining, however, this time there was the following idea proposed:

One idea discussed was incorporating a requirement that a percentage of contact hours must come from a local/regional Institute if one is available. This would ensure continued engagement with Institutes while still accommodating clerks in areas without one (e.g., Nevada and Idaho). While not a perfect solution, it offers a starting point rather than just raising concerns.

There is general recognition among IDs that contact hours make sense from a structural perspective. However, many still feel that maintaining a connection to Institutes is critical, as we have historically been held to a higher standard than other providers—a standard we take pride in and want to uphold to ensure continued clerk excellence. I will note that we understand that the move to contact hours is still just under consideration and is an exploratory phase.

### **2. EPP Program Participation**

So far, only a few IDs have signed up to offer EPP programs, and based on those on our call, none have actually provided offerings yet. The initial intent of the program seemed to be to provide clerks with post-MMC education that would support their continued professional development and help justify ongoing training to their supervisors. However, many states have their own state certifications with renewal requirements, which already serve a similar purpose. While we recognize that shifting CMC or MMC to a recertification model would be a significant change and likely face resistance, it may be worth exploring as an alternative—especially given that many Institutes are either unable or unwilling to offer EPP programming.

### **3. Clerk Membership Requirements**

The board may want to reconsider the current requirements for Full Membership, which mandate that clerks must perform at least four official responsibilities/duties.

In large cities, many clerks work in specialized roles—such as meetings clerks or records clerks—but are still integral to the profession. Because they do not meet the four-duty

requirement, they are unable to become full members. If the membership structure were more accessible, IIMC would likely see growth in membership, allowing duty-specific clerks to engage in professional development and certification opportunities.

**Management's Comments:**

Please refer to IIMC's Education Department's final report for more information on the developments listed above.

**To: IIMC Board of Directors**

**From: Angela Johnson, Acting Chair**

**Date: March 21, 2025**

**Subject: 2025 Futures Group Annual Report**

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**Background:**

The Futures Group met in person on February 20 and 21, 2025 in Rancho Cucamonga, CA. The Group's facilitator was Anne Uecker. The Group was comprised of the following members: Karen Mowad; Doug Barber; Kyna Thomas; Travis Morris; Stacy Bennett; Adrienne Breitfelder; Laura Oakman; Cheryl "Annie" Meredith; Angela Johnson; Tammy Mueller; Brenda Pree; Ruurd Palstra (unable to attend).

**Goals: The goals for the Futures Group should reflect its mission to anticipate and shape the future of municipal governance. Here are some suggested goals:**

1. What are we focusing on that we should no longer be.
2. Conduct comprehensive trend analysis and foresight exercises to identify emerging trends, challenges, and opportunities in municipal clerk governance, technology, demographics, and societal values.
3. Provide strategic planning support to the IIMC Board of Directors and general membership by offering insights, recommendations, and strategic foresight to inform long-term planning and decision-making processes.
4. Explore innovative practices and best-in-class examples from around the world to inspire and inform municipal clerks about future-oriented approaches to governance, administration, and service delivery.
5. Advocate for the importance of foresight, innovation, and future-oriented thinking in positioning IIMC and its members as thought leaders and agents of positive change.
6. Engage with IIMC members, community stakeholders, and the broader public to raise awareness about the Futures Group's work, solicit feedback, and ensure alignment with the evolving needs and aspirations of communities served by municipal clerks.
7. An implementation plan with timeline

**Trends Affecting Local Government and the Municipal Clerk**

- Impact on Local Government and Public Servants
- The New Citizen - expectations
- Challenges for Clerks – today and tomorrow
- Technology in Government (including Artificial Intelligence)
- Training Models and programs for professional development
- People Skills and personal development
- Gender and Cultural Diversity

**Implications for IIMC and its Future – Random Thoughts**

- Will IIMC still be relevant in 5, 10, 15 or more years?
- What skills will be required of Clerks?
- How do we attract new Clerks and make them part of the profession?
- How do we engage IIMC members in making IIMC more relevant?
- Is IIMC's Board of Directors accountable, transparent and attract top leaders?
- Institutes and their future – are they still relevant in their current format?
- International base – how do US members view our international members?

**Miscellaneous**

- General Observations on Change and trends in the profession and the Organization
- Reflections on the profession

The topics below were derived from the Group's meeting. Leading the category was the membership classification in IIMC's Constitution and how restrictive it currently is in bringing in new members. This is one area that will be tackled immediately after the St. Louis Conference. Future meetings will be virtual.

## IIMC

- Leader in Best Practices
- Be the “Go To” Organization- Sought After
- The Household Name for Clerks/Education
- Honored to be part of certification
- Onboarding Took Kit
- Foundation of Rules of Board
- Easier Access to Training
- Relevant to Current- What are the trends? i.e. Technology, Succession Planning, Education
- Pre-Recorded Videos- Benefits of IIMC- President, Executive Director, Education Committee, Membership,
- Availability
- Welcoming – Gracious Space
- Understand the Value of the Members

### **What do people say about IIMC?**

- Don’t have time.
- Cost/Expensive- Don’t have budget
- Role of IIMC-closing doors- need to open doors
- Doesn’t Apply to me
- Don’t need IIMC
- No feedback – get all training from their own associations.

### **#1 Relevancy**

- Certification
- Accreditation- Provide Higher Level of Education
- Already in Position- Continued Education
- Already have a Degree- Build Upon
- Need to MARKET-
  - Resources
  - Relevancy
  - Value of IIMC
  - Life Long Learning
  - Self Value/Self Worth- Internal Drive/Desire

### **How do we make IIMC more Global?**

1. Relevance- Role of Government- Elevate the Role- Accreditation, Expand Higher Education Online Opportunities
2. State Association- Participation, Pathway, Affiliate Agreement
3. Broaden Existence of Profession- Marketing, empowering Local, create awareness, gracious space, approachable
4. Thought Groups- Think Tank
5. Higher Level Role- Elevate
6. Promote & Reconnect
7. Initial Welcome- Explanation
  - a. Appreciated- Part of the Group
  - b. Membership Engagement
8. Process- Application- Quality of Education- Understanding the Audience
9. Mentor-Mentee- Networking Mentors
10. Elevate- CMC Requirement

### **IIMC Profession- Sought After Organization**

1. Networking
2. Technology
3. Justification
4. Resources
5. Efficiency

6. Tools
7. Embracing Changes
8. Building Trust

### **IIMC**

1. Accreditation- Education
2. Scholarship- Scheme
3. Mentorship
4. Marketing- website, communication
5. Region Director Role- More defined and uniform
6. **Affiliate Promotion Material-IIMC QR Codes, Information Access, News Alerts**
7. IT Initiatives Advocacy
8. Lobbying Legislators-Legislative Advocacy
9. Engagement- Average Community size, Mid-sized Communities- Partnerships- Creating Moments
10. Real World Solutions- People Work
11. Membership
  - a. Overhaul Criteria
  - b. Internal Conflict
  - c. Overhaul Constitution- Bulk Membership Scheme????
12. Promoting Profession
13. Committee Purpose
14. Committee Videos- Video marketing
15. Use of Technology
16. Creating Moments
17. Trainings- onboarding took kits-roles and responsibilities, Membership, Committee Members, Board Members, EC
18. Solid IIMC Description- Stand way of doing things
19. Code of Ethics

### **IIMC Changes**

1. Technology Changes- How are they viewed
  - a. Neutral
  - b. Positive
  - c. Negative
2. Directed Planned Change
  - a. Core Function of IIMC
    - i. Past
    - ii. Present
    - iii. Future
3. Managed Change
  - a. Offerings
  - b. Education
  - c. Resources
  - d. Demographic Changes
4. IIMC Core Duties
  - a. Past
  - b. Present
  - c. Future
    - i. Are the Core Duties growing or changing
5. Membership
  - a. Full Member
  - b. Additional Full Member
  - c. Affiliate Member
  - d. Bulk Membership
  - e. Other Member
  - f. Do we open up membership criteria
  - g. Retain/Recruit-
  - h. **How do we fill the gap?- Survey Membership- What does the Future of IIMC look like?- Where are we going.**
6. Understand the Audience

- a. Now
- b. New

7. Education

- a. Accreditation
- b. Macro Credentialling
  - i. Certified Parliamentarian
  - ii. Certified Records Management

### **Futures Group- Questions**

- How do we rebuild the trust with members?
- How does this fit into the Strategic Plan?
- Let's start with revisioning the Constitution- Membership- Expansion- County Clerks
- How does IIMC draw an International Membership?
- What is the core mission- Membership, Rights, Education?
- Does IIMC represent the name we need to be- Internation Institute of Clerks?
- How does IIMC engage members, empower members? Welcoming Opportunities, contribution of a team, How to grow new leaders- Emotional Intelligence, Understanding the whole picture
- How does IIMC become a Proactive Association?
- What has changed?
  - Is the membership underserved
  - Is IIMC still relevant- Elevate Education, switch processes
    - Core Education
    - Soft Skills-Deal with the Public, Risk Management
    - Wholistic Skills- Build Trust
    - Facilitators- State Level- Clerk Experts (Experienced Clerks)
  - Do we need to expand to states that don't have Institutes
  - Do we need to make it personal and focus on moments
  - What needs to be changed, modified, enhanced with Marketing and PR
    - Engagement Opportunities-videos, podcasts, challenges, grassroot campaigns, creating moments, authentic encouragement, partnering establishing connections, knowledge management- share knowledge collectively- Members, Committee, Board Members, EC, Conference videos-showing the moments
    - Slogan 'By us for Us'
- Lobby Legislature- Campaign-
- Promote Partnerships- ICMA, APT US & C,
- What Operational Changes would be beneficial – more infrastructure- priorities, mission, education
- How does IIMC Staff need to grow? 3/5 Staff Communications, 1 Education, Open Membership
- Would a ListServ be helpful? Inspiring Questions, Spark Engagement, Understanding to help see the interworking's to create commitment.
- How can IIMC be a change maker to grow and flourish?
- Sharing the Impact IIMC has: past, present, future
- What are the challenges of the role of a clerk? Provide Educational Opportunities to address challenges

### **Management's Comments**

As you can tell from the agenda and the discussions, there is a strong need to continue with the Group until it exhausts all possibilities. The first priority will be to work with IIMC Member Services to review and revise the Membership definitions and categories to help embellish and open the structure that hampers the possibilities of attracting future Clerks.

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** **Board of Directors**

**From:** **Stephanie C. Kelly, MMC, IDEAL Co-Chair**  
**Toya Harrell, CMC, IDEAL Co-Chair**

**Date:** **April 2, 2025**

**Subject:** **2025 IDEAL Committee Task Force Annual Report**

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### **Background:**

Under the leadership of President Lisa Garcia, IIMC announced the creation of The **IDEAL** Committee Task Force in June 2024.

This initiative is a significant step toward fostering a more inclusive, diverse, equitable, and accessible environment within our membership and Clerk community.

The **IDEAL** Committee, standing for "Inclusion, Diversity, Equity, Accessibility and Learning," embodies the organization's commitment to creating a culture that celebrates and respects the unique identities, backgrounds, and perspectives of all members of the IIMC community.

The primary objectives of the **IDEAL** Committee include:

1. Promoting Inclusion: Implementing initiatives and policies that ensure every individual feels valued, respected, and included.
2. Celebrating Diversity: Celebrate the rich diversity of cultures, beliefs, and experiences within our community.
3. Advancing Equity: Identifying and addressing barriers to equity to ensure fair treatment and opportunities for all members.
4. Enhancing Accessibility: Working towards making our conferences, programs and services accessible to all individuals.
5. Fostering Continuous Learning: Providing resources, training, and educational opportunities to promote understanding, empathy and growth in matters of inclusion, diversity, equity, and accessibility.

The **IDEAL** Committee is comprised of thirteen dedicated members who are passionate about creating positive change within IIMC. Together, we aim to build a more vibrant, supportive, and welcoming Clerk community where every member can feel valued, respected and empowered. To provide continuity, the task force structure allows for a 3-year commitment without annual turnover. The Executive Director will provide staff support.

**Discussion:** The Committee has met once. The first virtual meeting was on February 27, 2025. The meeting was very engaging as all members introduced themselves and shared their respective personal motivations for volunteering. The common themes expressed were feeling underrepresented, a desire to improve inclusivity and accessibility at conferences, programs, and in the additional services provided by IIMC.

The initial focus area identified by the Committee was accessibility at IIMC conferences to include the feasibility of providing interpreters, hearing loops, review of room layouts, lighting, acoustics, etc.

**Financial:** The **IDEAL** Committee does not anticipate specific budgetary requests; however, it is important to note some accessibility recommendations are certain to have financial implications, especially at conferences.

**Summary:** The **IDEAL** Committee work plan includes surveying the membership, determining meeting frequency, determining subcommittee structure, and the addition of closed captioning and other accessibility features to task force meetings. Further, the Committee looks forward to taking a deep dive into IIMC policies and practices through the lens of our individual experiences to foster a more welcoming, inclusive, diverse, equitable, and accessible organization for current and prospective members.

**Management's Comments:**

We look forward to supporting this Committee's initiative, especially in conducting thorough reviews of policies and practices to improve the Organization's accessibility, inclusivity and to provide a more equitable environment for all members.

# INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To: IIMC Board of Directors**

**From: Dwayne A. Caines, JP, Chair, International Relations**

**Date: March 26, 2025**

**Subject: 2024 International Relations End-of-Year Report**

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**Background:** The International Institute of Municipal Clerks (IIMC) is committed to promoting professional development and fostering relationships across global regions through its international outreach programs. As Chair for Region XI during the 2024/2025 term, I outlined key objectives aimed at strengthening international connections within the IIMC community. These objectives included managing the IIMC booth at the annual conference, promoting the International Buddy Program, featuring member profiles in the News Digest, and educating members on the value of global membership. Feedback from committee members, including Michael King, Camilla Pitman, and Patricia Bravo-Valdez, was instrumental in refining our strategies to ensure effective execution.

## **Discussion:**

### **1. Booth Management at the IIMC Annual Conference:**

- The booth served as a central engagement point for international members. We enhanced interactivity by showcasing impactful programs, sharing personal stories from Study Abroad participants, and organizing a meet-and-greet session for all members.
- Michael King suggested incorporating dynamic elements to attract delegate attention, while Patricia Bravo-Valdez recommended emphasizing the impact of members and programs. Camilla Pitman proposed integrating Study Abroad 2025 into the booth's décor—all of which were implemented successfully.

### **2. International Buddy Program:**

- This program fosters mentorship and cultural exchange across regions. We introduced clearer guidelines, improved participant matching, and established informal communication platforms (e.g., WhatsApp group) to facilitate interactions.
- Feedback highlighted the need for better administrative support, clear expectations, and ongoing check-ins, which were addressed to ensure meaningful engagements.

### **3. News Digest Profiles:**

- We featured profiles showcasing the achievements of Region XI members in the IIMC News Digest.
- Michael King emphasized the need for longer lead times for candidate participation, while Patricia Bravo-Valdez suggested spotlighting members such as Linda Troyan and Brenda Green, leading to increased member recognition.

### **4. Global Membership Awareness:**

- To encourage broader participation in IIMC's global initiatives, we launched targeted marketing campaigns and educational events, including webinars.
- Camilla Pitman highlighted the need to promote the Athenian Dialogues to Regions X and XI, while Patricia Bravo-Valdez recommended developing a comprehensive campaign to market global membership—both of which led to heightened awareness and engagement.

**Financial:**

The financial impact of these initiatives was minimal and included:

- **Booth Management:**
  - Materials and décor to support Study Abroad promotion and highlight member impact
  - Incentives and promotional items for the meet-and-greet session
- **Buddy Program:**
  - Modest administrative expenses to manage the program and establish communication platforms
- **News Digest Profiles:**
  - No direct financial cost—utilized existing publication resources
- **Global Membership Campaign:**
  - Limited expenditures on digital marketing (e.g., social media, newsletters), and educational webinar support

**Summary:** The International Relations Committee, under my leadership as Chair for Region XI, has made significant progress in advancing its goals for the 2024/2025 term. The four primary objectives—managing the booth at the annual conference, promoting the Buddy Program, featuring member profiles in the News Digest, and raising awareness about global membership—have been successfully implemented with valuable input from committee members. Through a collaborative approach, the committee has enhanced engagement and professional development within the IIMC community. While financial costs were minimal, the success of these initiatives relied on strategic planning, administrative support, and active member participation.

**Management's Comments:** We commend the International Relations Committee for its dedicated efforts, particularly the enhancements made to the booth during the Annual Conference. Staff will continue to provide marketing materials related to the 2025 Study Abroad/Symposium Program. We appreciate the contributions to the News Digest and the ongoing promotion of the International Buddy Program.

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS



**To: IIMC Board of Directors**

**From: Sharon McFadden, Chair**

**Date: March 21, 2025**

**Subject: 2025 Membership & Mentoring Annual Report**

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### **Background: -- 2024/2025 Membership & Mentoring Committee Members**

Julie Barnett, MMC, Board Liaison, Evans, CO; Shawn Campbell, MMC, Vice-Chair, Auburn, WA; Cassandra Candini-Tilton, CMC, Member, Manteca, CA; Janis Daudt, Staff Liaison, Rancho Cucamonga, CA; Megan Eldridge, Member, Clarkson Valley, MO; Stephanie Galarza, Staff Liaison, Ranch Cucamonga, CA; Margaret M. Gray, Board Liaison, South Elgin, IL; Sharon McFadden, MMC, Chair, Mineral Wells, TX; Julie Ogg, MMC, Member, Columbus, OH; Sabrena Ann Reinhardt, MMC, Member, Leland, CO; Brittney Sandoval-Soto, MMC, Member, Tampa, FL; Tammy Storrie, Staff Liaison, Ranch Cucamonga, CA

### **Committee Purpose**

To promote IIMC, communicate with new members and bring together experienced members with less-experienced members for the benefit of both the individuals and the profession.

### **Committee Goals**

- 1) Work with the Member Services Department, focusing on contacting new members each month to welcome them to IIMC and suggest to them how to get the most out of their IIMC membership (including mentoring). Direct them to IIMC Staff with questions.
- 2) Provide a schedule of members to "staff" a "Welcome First Timers" table at the Annual Conference to share information to maximize the benefits of their conference attendance and promote the Mentoring Program.
- 4) Update the current mentors/mentees list.
- 5) Continue to recruit mentors and mentees.

### **Committee Work**

**Welcome & Congratulatory Letters** -- The Committee has welcomed 954 new members and congratulated 319 CMC and 101 MMC designees from the June 2024 – February 2025.

**Mentorship Program** -- The Committee has also identified seven mentees and recommended them to IIMC staff to be paired with a mentor. The Committee received ten inquiries for additional information about IIMC that were referred to the IIMC staff members. Committee members will staff the First-Timers table at Annual Conference

### **Financials:**

The Committee requested funding for the 'First-Timer' lapel pins and M&M chocolate candies to be handed out at the newcomers table at the 2025 annual conference in St. Louis.

### **Summary:**

The Committee will continue accomplishing the goals designated by the Board for the remainder of the year and is looking forward to staffing the 'First-Timers' table, interacting with the newcomers, and distributing lapel pins at the annual conference.

### **Management's Comments:**

IIMC will be happy to procure First-Timer pins at a small cost to the Organization and candy at the First Timers welcome table.

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Board of Directors

**From:** Chad Daggett, CMC (Chair)

**Date:** March 25, 2025

**Subject:** 2025 Public Relations & Marketing Annual Report



**Committee Members:** Chad Daggett, CMC (Chair); Allison May, CMC (Vice-Chair); Fiona Buchanan; Shannon Collins; Kiley Fusco, MMC; Cecilia Good, MMC; Lindsey Grigg-Moak, MMC; Karen Logan, CMC; Diane Pflugfelder, MMC; Lisa Stites, MMC; Tana Ward, CMC; Tory Frink, MMC (Board Liaison); Angela Johnson, MMC (Board Liaison); Karen Lee (IIMC Staff Liaison).

**Discussion:** The committee convened monthly via Zoom and successfully accomplished the goals and objectives set forth by the IIMC Board of Directors for the 2024-2025 term.

### Achievements:

- Assisted the IIMC Elections Committee in subcommittee participation for current IIMC Vice-President elections activities.
- Submitted an article for the IIMC News Digest with an “Athenian Dialogue” theme – several clerks appreciated the article and there has been an uptick in Athenian Dialogue participation since the article was published.
- Had a successful team holiday card exchange, encouraging stronger cohort relationships.
- Boosted the Program Excellence in Governance Award (PEGA) breaking the record with six applicants in 2025; the winner will receive free conference registration.
- Created and brought to life a new IIMC mascot named “Quill” to debut for Professional Municipal Clerks Week in 2025.
- Ending the 2024-25 term by brainstorming ideas for IIMC’s 80<sup>th</sup> Anniversary in 2026.

**Financial:** None.

**Summary:** A special thank you to IIMC’s Karen Lee for her exceptional work. The committee appreciates Karen’s excellent support, organization skills, and knowledge of communications.

### Management’s Comments:

We appreciate this Committee’s work throughout the years. Their recommendation to provide complimentary conference registration to the PEGA and Quill winners attracted an all-time high of six PEGA applications this year. We will continue with this process for 2026. Also, we are looking forward on creating the 80<sup>th</sup> anniversary logo to coincide with the 2026 Conference in Reno, NV. Those designs will wrap up this summer.

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** **Board of Directors**

**From:** **Ariana Cisneros, CMC, Chair**

**Date:** **March 26, 2024 (no update for 5/2025)**

**Subject:** **2025 Records Management Annual Report (Initially filed for May 2024 and the November 2024 midyear Board meeting)**

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### **Update:**

This report was filed for the May 2024 year-end Board meeting. The committee members and Board liaisons were updated for this term.

### **Background:**

The Records Management Committee develops informational resources to assist IIMC members their records management needs.

**Committee Members:** Ariana Cisneros, CMC, Chair; Alicia Richardson, CMC, Vice Chair; Tracy M. Simons, MMC; Rebecca Tompkins, CMC; Sophia McGuire; Madeline Sielu; Tanya Ferguson, CMC; Heather Abraham; and Lucinda Williams, MMC.

**Board Liaisons:** Sherri Gard, MMC, Awilda Hernandez, MMC and Kerri Parker, CMC

**Staff Liaisons:** Janet Pantaleon and Marlena Hernandez

### **Discussion:**

**Meetings:** The Records Management Committee first met via Zoom on June 13, 2023 and agreed to meet monthly. The Committee meet July 11, 2023, August 8, 2023, October 10, 2023, November 14, 2023, January 9, 2024, February 13, 2024, and March 20, 2024. The Committee canceled the September 2023 meeting as it conflicted with the 2023 Granicus City Clerk Virtual Summit, which some committee members attended and the December 2023 meeting due to the winter holidays.

**Goals / Budget Requests:** Committee Members reviewed the 2023-24 Committee Goals and Objectives and Committee deadlines. The Committee did not find need to submit a budget justification request to the Budget and Planning Committee.

**Educational Sessions:** The Committee discussed partnering with ARMA, NAGARA and AIIM to provide educational content for IIMC members. The Committee also suggested inviting state archivists and/or staff from national archives or presidential library archives in the host state to the Annual Conference. The Committee reached out to ARMA multiple times during the year. The ARMA contact was on maternity leave and finally responded in late February 2024, leaving

little time to partner this year. However, ARMA is open to continuing discussions with the 2024-25 Committee.

**Articles:** Committee Members volunteered to write articles for IIMC on records management and set the timing for article submission throughout the year. The Committee submitted articles regarding Historical Records and April Records and Information Management Month.

**Technical Bulletins:** The Committee continues reviewing the IIMC website for records management content, particularly the technical bulletins section, to determine when publications require updating.

**State Retention Schedules:** The Committee continues to gather records retention schedules from each state and member countries to post on the IIMC website. Members forwarded retention schedules to IIMC staff for posting. The Committee also discussed adding local retention schedules to the website as a member resource. Committee Members informed IIMC staff when they found broken web links and made recommendations for website content regarding records management. The Committee recommends annual review of the retention schedules to ensure IIMC has the most current schedules and working links on the website.

**Other issues:** The Committee discussed the following topics during the year: grant funding for records management initiatives, celebrating ARMA Records and Information Month (April) and partnering opportunities with records and information management associations (ARMA, NAGARA, AIIM, etc.).

Having found no grant opportunities for records management projects, the Committee asked the IIMC Foundation if it would create such a grant. The Foundation did not offer records management grants. The Committee will continue to seek grant opportunities in other venues.

The Committee had a difficult time locating the correct ARMA contact as the contact was on maternity leave. The committee and ARMA are now in contact, however, with little time to plan for an April Records and Information Management Month event/s. We hope the 2024-25 Committee will continue with this relationship and plan an April 2025 campaign which could include records management workshops for IIMC members that qualify for certification points, an outline and materials for members to celebrate RIM Month in their organizations and opportunities for IIMC and ARMA to focus on records management in the public sector industry.

The Committee thanks IIMC for the opportunity to serve the membership and wishes the best for the 2024-25 Committee Membership.

#### **Management's Comments:**

The Committee's involvement with recommending education sessions for the Conference is always appreciated and so is their ongoing feedback with new Technical Bulletins. We appreciate the two *News Digest* articles, and we will, most likely, reconnect with ARMA in 2025-2026. At some point, we would like to embark on another grant to create new Technical Bulletins.

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Board of Directors  
**From:** Audra Etzel, MMC - Chair  
Erika D.M. Hammond, CMC - Vice-Chair  
**Date:** March 26, 2025  
**Subject:** 2025 Research & Resource Annual Report

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### Background:

The PURPOSE of the IIMC Research & Resource Committee is: "to assist in surveying the membership on various issues as necessary; and to ensure that members are provided with quick and accurate answers to inquiries through the membership network and resource library."

The 2024/2025 GOALS AND OBJECTIVES are:

1. Dive Deep into in-house publications like Role Call and Language of Local Government, ensuring they reflect the latest insights and development in our field.
2. Collaborate closely in the development and distribution of surveys and questionnaires as requested by the Board of Directors, Committees, and staff, while amplifying the voice of our esteemed members.
3. Swiftly address member inquiries submitted to the IIMC website and staff, providing unparalleled support and guidance.
4. Review and potentially update existing or create new IIMC Technical Bulletins, serving as invaluable resources for our members' professional growth and development

### Members:

Audra Etzel, MMC, Chair, City of Otsego, MN; Erika D.M. Hammond, CMC, Vice Chair, City of Columbia, SC; Wendy Gannon Lionetti, Town Clerk, Town of Ridgefield, CT; Denise Garzaro, CMC, Inland Empire Utilities Agency, Chino, CA; Judi Green, Senior Executive, Deputy Clerk, County of Mathews, VA; Laura Pierce, MMC, City of Auburn Hills, MI; Diane K. Whitbey, MMC, City Clerk/Treasurer, North Little Rock, AR.

### Board Liaisons:

Lori McWilliams, MMC, Village of Tequesta, FL; Colleen Mulvey, MMC, City of Cedar Hills, UT

### IIMC Staff Liaison:

Stephanie Galarza, Member Services Representative; Tammy Storrie, Member Services Representative

On behalf of its members, it is our distinct honor and privilege to have been selected to serve on the Research and Resource Committee and to assist in the implementation of the goals and objectives as established.

**Discussion:** The Committee was provided revamped goals for the 2024/2025 year.

Using our experiences and expertise, the Committee, as of this date, has actively responded to requests relative to the following matters:

Reviewed and provided feedback on the following:

- IIMC Survey Questions for the State of the Clerk's Office.
- Election Committee Survey
- IIMC Member Salary Survey
- IIMC Education Department Survey regarding CMC and MMC in progress
- IIMC Region III Director Voting Ballot
- IIMC Official Voting Ballot 2025

Assisted member with an updated standard job performance evaluation form. Provided a member sample checklists for public notices.

Vice Chair Hammond and I also met with one of IIMC's sponsors to evaluate and comment on the results of a survey that was performed.

**Financial:**

The Committee did not expend any funds for 2024/2025, nor does it anticipate any financial impacts or budget requests through May 2026.

**Summary:**

The Committee will continue to work on the goals and stands ready to assume any task when called upon by the Executive Board, Board of Directors, IIMC Staff, and Members. Presently, the Committee does not have a specific recommendation for the Board of Directors and continues to support its collaborative efforts.

The committee would like to thank IIMC Staff and the Board's Liaisons for their direction and guidance.

**Management's Comments:**

Thank you to the members of this committee who are always ready to answer membership questions regarding city ordinances and more, as well as vetting surveys. We appreciate their expeditious manner in vetting the Region III Director ballot, the VP candidate ballot and the Escribe Survey (IIMC sponsor) on State of the Clerk's Office that was made available in 2025.

# INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** **Board of Directors**  
**From:** **Jannette Goodall, MMC, Election Chair**  
**Sue Haag, MMC, Election VC**  
**Date:** **January 29, 2025**  
**Subject:** **2025 Election Annual Report**

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## **Background:**

The Election Committee is responsible for conducting and supervising all elections. Following the November 2024, IIMC Executive Board Meeting requested the Committee review one additional clause in the Election Policy. That clause was:

Sec 2.20.060 – Election – Region Directors

*“If a state association has more than one qualified candidate vying for an IIMC Board position, it is up to the state association to conduct its own election. If the state association cannot support conducting its own election, it can request IIMC to assist in the process.”*

## **Discussion and Recommendations:**

Following discussion at the January 17, 2025, Election Committee Meeting, the Committee proposed the following recommendation for consideration:

*“If a state in a region’s rotation cycle has more than one qualified candidate vying for an IIMC Board position, IIMC will run an election for the IIMC members from that state.”*

The Committee believes this amendment addresses the concern of disenfranchising IIMC members who are county clerks and not members of a state municipal clerk association, ensures that only IIMC members are voting and maintains that only IIMC members from that state (as opposed to the entire region) are voting. It establishes a standard practice for all Region Director elections consisting of more than one candidate. It honors the rotation practice that many, if not all the Regions, have had for years to allow the selection of a Region Director to rotate among the States within the Region

## **Summary:**

I would like to thank President Garcia and the Board for the opportunity to Chair this great committee. I would also like to thank the Committee Members for their service: Susan Haag (Vice Chair), Laura Cahill, Shelley George, Beth Hickman, Joel H. Hondorp, Stephanie C. Kelley, Bruce Poole, Robin Raines-Bond, Dan Weinrib and Board Liaisons: Kathy Montejo, Trish Gleason and Jamie Newman. Special thanks to Chris Shalby and Janet Pantaleon for their support and guidance. It has been an honor to serve with you all on this committee.

## **Management’s Comments:**

We agree with the Recommendation for paragraph Sec 2.20.060 – Election – Region Directors: *“If a state in a region’s rotation cycle has more than one qualified candidate vying for an IIMC Board position, IIMC will run an election for the IIMC members from that state.”* We thank the committee for their tremendous efforts this past year regarding the Region III Director Election and the IIMC VP Election. Their guidance, experience, fairness and collegiality were a true example of professionalism.

# INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Board of Directors

**From:** Angela Richburg, MMC – Chair  
Dyanne C. Reese, MMC – Vice Chair

**Date:** April 1, 2025

**Subject:** 2025 Policy Review Annual Report

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**Committee Members:** Toya Harrell, CMC; Donna Lobaito, CMC; Peter Sass; Marc Donohue, MMC (Board Liaison); Stephen Huycke, CMC (Board Liaison); Travis Morris, MMC (Board Liaison); Carrie Mugford, MMC (Board Liaison); and, Chris Shalby (Staff Liaison)

**Purpose:** To monitor and provide policy guidance to ensure purpose, consistency, accuracy and fair application. To review policies, positions, and perspectives regularly and recommend appropriate revisions to the IIMC Board of Directors

## Goals and Objectives:

1. Review current Policy Manual and recommend revisions to ensure policies reflect current Board practices as needed.
2. Develop new policies as requested by the Board of Directors.
3. Review policy proposals submitted by the Board of Directors.
4. Perform annual review of the minutes of the Board of Directors meeting to ensure policy changes are codified.
5. Provide policy articles of interest for inclusion in the News Digest.
6. Review the IIMC Constitution every five years, beginning with year 2021, 2026, 2031, 2036

## Direction from the Board of Directors:

1. Create an Ethics Policy
2. Create a policy to remove of a Board Member
3. Application of the policies: Chair, Vice Chair, Member of a Committee, Board Member – anyone who is in a leadership position

**Discussion:** The Policy Committee approved an Ethics Policy and a Leadership Role Removal policy as follows for review by the Board of Directors:

## Ethical Standards Committee

When required pursuant to Article XII, Section 3 of the Constitution, the IIMC Board will establish, an Ethical Standards Committee (Committee) to investigate a complaint that a Member has violated the Code of Ethics.

### Applicability:

The Committee shall have the authority to accept, review, investigate and make determinations and recommendations for complaints for any member of the Board, Chairs and Co-Chairs of Committees and any other member holding a leadership role in IIMC.

1. To facilitate the formation of the Committee as required, the Executive Director will maintain a roster of full, additional full members, or honorary interested in serving on an Ethical Standards Committee (the “roster”). The roster will be developed during the

annual recruitment of Committee Members. Current Board members shall not be eligible to be members of the Committee.

2. Complaints that a Member has violated the Code of Ethics, shall be made to the Executive Director in writing and shall include any documentation or statements to support the allegation.
3. Upon receipt of a complaint that a Member has violated the Code of Ethics, the Executive Director will notify the President (without revealing the substance of the complaint). The Executive Director will also provide the President with the roster of Members interested in serving on the Ethical Standards Committee, but will not include the names of any Member who is the subject of the complaint, or likely, based on the content of the Complaint, to have information or personal knowledge of the substance of the complaint.
4. The President shall recommend the establishment of the Committee to the Board. The Committee shall be made up of five (5) full, additional full members or Honorary members from various regions of the IIMC in good standing, including a Chair and Vice-chair.
5. To appoint the Committee expeditiously, the Board may concur to the appointment of the Committee electronically. Wherever required, the Board will confirm the appointment of the Committee at its next regular or special Board meeting. The confirmation shall be *nunc pro tunc* to the date the Board approved the appointment electronically.
6. The Executive Director shall transmit the complaint within three (3) business days to the Chair of the Committee once appointed.
7. The Committee shall be empowered to conduct interviews, request documents and any additional action that will enable them to obtain the information that will allow them to make an informed and considered finding including interviewing the subject of the allegation.
8. Within forty-five (45) calendar days of receipt of the complaint, the Committee shall present their findings to the Executive Director. The President can extend the deadline by a maximum of fifteen (15) days.
9. The findings shall include a recommendation of one of the following:
  - a. Unsubstantiated - No action due to the allegations not supported by the information and documentation available to the Committee
  - b. No action due to inability to substantiate the allegations – there is a reasonable finding that the allegations have occurred, but the information available to the Committee is not complete or the Committee was unable to substantiate it to the degree of probable cause
  - c. Substantiated - Official censure – the allegations are supported but do not rise to the level of removal from the Board
  - d. Substantiated - Removal – the Committee makes a finding that the allegations have occurred; and/or may continue to occur; and impacts the perception of the Board.
10. A quorum of members of the Board of Directors shall make the determination of the action to be taken.

11. The determination will be done in Executive Session. Any Board member who violates the rules of Executive Session including sharing (talking, writing, texting, etc.) any information about the allegations, the investigation and the discussion of the Board before, during or after the official findings are presented, shall be subject to immediate removal.
12. If the allegation(s) involves the Executive Committee, the member shall not be present or part of any discussion and shall be excused from the meeting.
13. If the allegation(s) involves a Board member, that member shall not be present or part of any discussion and shall be excused from the meeting.
14. Once the Board votes on the action to be taken, the information will be placed in the annual report from the Ethics Committee for inclusion in the annual report.
  - a. Findings of unsubstantiated shall make a reasonable effort to not disclose the parties involved but will give a high-level overview of the allegations and the findings.

### **IIMC Board Member Removal Policy**

In the ordinary course of business for any nonprofit, members of a Board of Directors will come and go. Sometimes a board member leaves voluntarily, and other times the organization takes action to remove a board member.

Removing a board member generally falls under one of three general circumstances:

#### **Voluntary removal or resignation**

Many times, board members find themselves resigning for any number of personal reasons. This removal is the most straightforward of the three. The director who is stepping down needs to submit their resignation in writing, whether electronic or hard copy. After receiving the resignation, the remaining board members need to ensure the resignation is documented in the minutes at the next board meeting and the written resignation is maintained with the minutes.

#### **Removal by Policy**

Removing a board member by policy happens when your policy dictate that a board member needs to be removed. For example, if there is a limit to the number of terms a board member can serve or missing meetings (current policy), they would be removed by policy. If your bylaws dictate board member removal in such situations, technically, the member would be off the board just by violating the policy. However, the remaining board members should take time at the next meeting to officially remove the member in violation and ensure that action is recorded in the meeting minutes.

#### **Removal for Office**

The third circumstance for board member removal covers situations in which a Board member's conduct warrants action by the Organization. Examples include incidents that decrease trust, accusations of harassment and misconduct, misusing the Organization's funds, or not in compliance with the Organization's Code of Ethics, Conflict of Interest, collusion and making statements that are at odds with the Organization's mission and purpose.

Keep in mind that there is no "right to serve" on the Board of an entity with a membership base. While there are rights attached to employment/staff situations, there are no rights attached to a **voluntary** position. IIMC's policy needs to ensure that a board member can be removed with or without cause by a majority vote of the directors is a best practice and allows IIMC to act quickly when needed.

## **Removal from Office**

As Directors and Officers serve on a voluntary basis, they may be removed from office at any time, upon a 2/3 majority vote of all the Directors present.

**Financial:** There are no budget needs for the current year.

**Summary:** Former Chair Darcie McCracken did a wonderful job in guiding us to a point of progressing with the Ethics Standard Committee and IIMC Board Member Removal Policies for recommendation to the Board of Directors. I'm excited to take that role of Chair to end the 2024 -2025 IIMC Policy Review Committee and proceed as the 2025 -2026 Chair and look forward to continuing to work with the committee members on policies as directed.

## **Management's Comments:**

We agree with the newly created **Removal of Members in a Leadership Role Policy** and recommend that the Board adopt these this important policy.

Regarding the **Ethical Standard Committee**, we would appreciate more time to review and revise, since the Organization already has an existing policy. This policy discussion began with the appointed Chair Darcie McCracken and was, in my opinion, never fully discussed due to McCracken's resignation from her city and, subsequently, the Committee. I believe current Chair Richburg did her best to continue but I believe this still needs revisions.

I've taken the liberty of sharing my Comments with Chair Richburg and Vice Chair Reese. The Committee agrees with my recommendation.

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Board of Directors

**From:** Barbara Blackard, MMC  
Chair

**Date:** March 1, 2025

**Subject:** 2025 Budget & Planning Annual Report (presented at 2024 midyear meeting)

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### **Management's Comments:**

This report was presented at the 2024 November midyear Board meeting. The 2024 YE financials are in this agenda and the 2025 first quarter financials will be a handout.

### **4/14/25 -- 2024-2025 Budget Update**

**Management recommends that the Board approve the 2024 year-end budget.**

### **CALL TO ORDER**

Board Members Present: President Lisa Garcia, MMC; President Elect Dawn Abrahamson, MMC; Vice President Lee Frazier, MMC; Immediate Past President Mary Ann Hess, MMC  
Board Liaison Region V Director Carrie Mugford; Board Liaison Region VIII East Director Angela Johnson, MMC; Budget Chair, Barbara Blackard, MMC; Vice Chair Sheri Pierce; and Member at Large Kimberly Hoesing, CMC

Staff Members Present: Executive Director, Chris Shalby; IIMC CPA, Connie Parker; Finance Specialist, Shannon Kane; and Office Manager, Janet Pantaleon

### **Executive Director Update**

Budget Chair Barbara Blackard asked everyone in attendance to introduce themselves. After brief introductions Chair Blackard then reviewed the committee goals and objectives as well as policies. Chair Blackard then asked for approval of the agenda.

Approved Unanimously

Chair Blackard asked Executive Director Shalby to provide an overview of the management's notes submitted to the Committee with the agenda.

ED Shalby presented the following for discussion and/or action.

**4/14/25 -- Requests #2, 3, 4 and 5 were approved at the 2024 midyear Board meeting.**  
**Request #1 was not approved based on the Elections Committee survey, which proved that the issue was not Survey Monkey, but a lack of interest or not knowing the candidates. The survey's results were issued to the Elections Committee and the Board in January 2025.**

- 1. Elections Committee requesting \$10,000 to hire an election company to conduct IIMC Vice President election.** The Committee did not approve this request, stating they would rather see a membership survey posing specific questions regarding voter turnout. Once those results are final, they will revisit the request, citing that a voting platform may not necessarily produce a larger voter turnout.

2. **Futures Committee:** Management is requesting a \$13,500 budget for this initial year as would be beneficial to have face-to-face discussions.  
**This request was approved unanimously**
3. **Conference: 2025 Conference Registration Fee Increase, St. Louis MO.**  
Proposal to increase delegate conference registration fee \$25. ED Shalby explained that cost of conducting business has been increasing drastically and registration fees have not caught up to the increase in goods, audio visual, space rentals, food and beverage.

Most registration fees only cover classes. Our conference registrants get classes, networking opportunities along with venues and meals. Shalby would like to eliminate the multi attendee discount from the conference. \$25.00 increase is included in the total budget to be presented to the Board.

**The request to increase conference fees by \$25 was approved unanimously**

ED Shalby said staff will delay in posting conference registration until Mid-Year meeting when Board will vote.

#### **4. 2025 Membership Dues**

\$10.00 dues increase was recommended by Director Shalby. Per policy staff is to present a dues increase every other year with 2025 being the year. \$10.00 increase is included in the total budget to be presented to the Board.

**The request to increase membership dues by \$10 was approved unanimously**

#### **5. Staff Salary Increase of 5%**

Director Shalby asked for an increase to staff salaries of 5%.

**The request to increase staff salaries by 5% was approved unanimously.**

# INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Budget & Planning Committee

**From:** Chris Shalby, Executive Director  
Shannon Kane, Finance Specialist

**Date:** March 23, 2025

**Subject:** 2024 Fourth Quarter Notes



The fourth quarter, December 2024 YE reflects a Net Profit of \$39,813. This is \$38,847 over the projected annual budget of \$966. When comparing December 2024 with December 2023, the 2024 net income is \$12,385 less than the 2023 net income.

## Reserve Balance

MMA – Operating	\$ 989,738
MMA – Board Designated Reserves – Cash	\$ 351,866
MMA – Board Designated Reserves – Schwab	<u>\$1,077,697</u>
Total MMA – Board Designated Reserves	\$2,419,301

Please note that \$10,963 of the Schwab balance is the unrecognized gain of the investments as of 12/31/2024.

## SCHWAB ACTIVITY FROM OPENING IN 2023 – 12/31/2024

Schwab Initial Investment	\$ 750,000
CD closed and deposited to Schwab	<u>\$ 239,265</u>
Total funds initially deposited to Schwab	\$ 989,265
Value at 12/31/24	<u>\$1,077,697</u>
Total Increase in value	\$ 88,432
Less Unrealized Gain	<u>\$ 10,963</u>
Income received in interest, dividends, gains	\$ 77,469

## Administrative

- Administrative YE has a net loss of (\$515,401) compared to the budget of (\$566,185).
  - **Income** – Earned \$62,752 more than budgeted.  
Income is more than budgeted due to Schwab activity. Interest income earned \$32,040 more than the budgeted \$50,000. Realized gain and unrealized gains are not budgeted for and ended the year at \$19,748 in realized gains and \$10,963 in unrealized gains.
  - **Expenses** – Expended \$11,968 more than budgeted.

## Building

- Building YE has a net loss of (\$99,368) compared to the budget of (\$60,180).
  - **Income** – Earned the amount budgeted.
  - **Expenses** – Expended \$39,188 more than budgeted. \$7,000 was for roof repairs, \$10,000 was for bathroom repairs and \$35,000 was for non-capitalized air conditioning repairs.

## Committees

- **Executive Committee** – Expended (\$4,438) less than budgeted.
- **Board of Directors** – Expended \$28,350 more than budgeted for the year to date. Legal fees were \$13,251 over budget and Mid-Year meeting was \$23,478 over budget.
- **Other Committees** – Expended \$1,808 more than budgeted. This is a result of Budget & Planning being \$3,733 over budget.

## Conference

- Conference YE has a net loss of (\$103,636) compared to the budget of (\$74,475).
  - **Income** – Earned (\$10,467) less than budgeted. \$10,000 was budgeted for Offsite Education Program which was not offered so the rest of income was on budget.
  - **Expenses** – Expended (\$18,694) more than budgeted. AV expense was \$19,911 over budget so the main factor in total expense being over budget.

## Education

- Education YE has a net loss of (\$67,167) compared to the budget of (\$126,608).
  - **Income** – Earned \$57,996 more than budgeted.
  - **Expenses** – Expended (\$1,445) less than budgeted.

## Marketing

- Marketing YE has a net loss of (\$130,540) compared to the budget of (\$142,036).
  - **Income** – Earned \$1,943 more than budgeted.
  - **Expenses** – Expended (\$9,553) less than budgeted.

## Membership

- Membership YE has a net profit of \$1,171,120 compared to the budget of \$1,159,925.
  - **Income** – Earned \$41,618 more than budgeted.
  - **Expenses** – Expended \$30,423 more than budgeted.

**IIMC Financials**

FISCAL YEAR 2024

December 31, 2024

**Statement of Financial Position**

	Current Year	Prior Year
<b>ASSETS</b>		
Current Assets		
Petty Cash	348	348
General Checking	361,049	729,687
MMA - Operating	989,738	1,107,009
MMA - Reserve Accounts	351,866	195,117
Charles Schwab Investments	1,077,697	770,014
Accounts Receivable	49,847	37,011
Prepaid Expense	95,074	52,003
	<b>2,925,620</b>	<b>2,891,189</b>
	<b>Total Current Assets</b>	
Land	321,408	321,408
Building and Improvements	426,194	408,267
Furniture and Equipment	8,368	12,278
Computer Software	17,847	22,681
Loan Cost	4,414	5,150
	<b>778,232</b>	<b>769,784</b>
	<b>TOTAL ASSETS</b>	
	<b>3,703,852</b>	<b>3,660,974</b>
<b>LIABILITIES AND EQUITY</b>		
<i>Current Liabilities</i>		
Accounts Payables	103,846	87,971
Accrued Expense	96,067	82,309
Deferred Revenue	1,005,195	1,016,144
Grants Payable	841	841
Due to Foundation	2,500	2,825
	<b>1,208,449</b>	<b>1,190,091</b>
<i>Long Term Liabilities</i>		
Tenant - Security Deposit	6,150	6,150
Mortgage Loan	492,900	508,193
	<b>499,050</b>	<b>514,343</b>
<i>EQUITY</i>		
Equity	1,956,540	1,904,342
Net Income/(Loss)	39,813	52,198
	<b>1,996,353</b>	<b>1,956,540</b>
	<b>TOTAL LIABILITIES &amp; EQUITY</b>	
	<b>3,703,852</b>	<b>3,660,974</b>

## IIMC Financials

FISCAL YEAR 2024

SUMMARY TOTALS

December 31, 2024

Department	Prior Yr Actual	Annual Budget	YTD Actual	YTD Budget	YTD Variance	Annual Variance	Annual Projections
INCOME:							
Administration	55,513	50,000	112,752	50,000	62,752	62,752	112,752
Building	63,162	65,987	65,987	65,987	0	0	65,987
Conference	547,505	577,245	566,778	577,245	(467)	(467)	566,778
Education	404,133	245,900	303,896	245,900	57,996	57,996	303,896
Marketing	32,791	28,750	30,693	28,750	1,943	1,943	30,693
Membership	1,439,367	1,455,000	1,496,618	1,455,000	41,618	41,618	1,496,618
Total Income	2,542,472	2,422,882	2,576,725	2,422,882	163,843	163,843	2,576,725
EXPENSES:							
Administration	573,293	616,185	628,153	616,185	(11,968)	(11,968)	628,153
Building	137,937	126,167	165,356	126,167	(39,189)	(39,189)	165,356
Committee - Board of Directors	186,249	140,450	168,800	140,450	(28,350)	(28,350)	168,800
Committee - Executive	21,825	33,400	28,962	33,400	4,438	4,438	28,962
Committees - Other	13,148	15,625	17,433	15,625	(1,808)	(1,808)	17,433
Conference	689,328	651,720	670,414	651,720	(18,694)	(18,694)	670,414
Education	440,559	372,508	371,063	372,508	1,445	1,445	371,063
Marketing	146,108	170,786	161,233	170,786	9,553	9,553	161,233
Membership	281,827	295,075	325,498	295,075	(30,423)	(30,423)	325,498
Total Expense	2,490,274	2,421,916	2,536,912	2,421,916	(114,996)	(114,996)	2,536,912
PROFIT/(LOSS)							
Administration	(517,781)	(566,185)	(515,401)	(566,185)	50,784	50,784	(515,401)
Building	(74,774)	(60,180)	(99,368)	(60,180)	(39,188)	(39,188)	(99,368)
Board of Directors	(186,249)	(140,450)	(168,800)	(140,450)	(28,350)	(28,350)	(168,800)
Committee - Executive	(21,825)	(33,400)	(28,962)	(33,400)	4,438	4,438	(28,962)
Committees - Other	(13,148)	(15,625)	(17,433)	(15,625)	(1,808)	(1,808)	(17,433)
Conference	(141,823)	(74,475)	(103,636)	(74,475)	(29,161)	(29,161)	(103,636)
Education	(36,425)	(126,608)	(67,167)	(126,608)	59,441	59,441	(67,167)
Marketing	(113,316)	(142,036)	(130,540)	(142,036)	11,496	11,496	(130,540)
Membership	1,157,540	1,159,925	1,171,120	1,159,925	11,195	11,195	1,171,120
Net Profit/(Loss)	52,198	966	39,813	966	38,847	38,847	39,813

## IIMC Financials

FISCAL YEAR 2024

Administrative

December 31, 2024

Description	Prior YR Actual	Annual Budget	YTD Actual	YTD Budget	YTD Variance	Annual Variance	Annual Projections
<b>INCOME</b>							
Interest	46,777	50,000	82,040	50,000	32,040	32,040	82,040
Realized Gain or (Loss)	(2,786)	-	19,748	-	19,748	19,748	19,748
Unrealized Gain or (Loss)	11,522	-	10,963	-	10,963	10,963	10,963
Total Income	55,513	50,000	112,752	50,000	62,752	62,752	112,752
<b>EXPENSES</b>							
Personnel Costs	374,614	406,176	406,765	406,176	(589)	(589)	406,765
Other	4,172	2,500	4,646	2,500	(2,146)	(2,146)	4,646
Staff Travel	3,240	8,070	6,934	8,070	1,136	1,136	6,934
Professional Develop/Training	1,013	1,500	599	1,500	901	901	599
Professional Services	60,438	65,350	60,675	65,350	4,675	4,675	60,675
Legal Fees	1,563	2,500	-	2,500	2,500	2,500	-
Computer Costs	65,161	65,000	72,247	65,000	(7,247)	(7,247)	72,247
Office Equipment	9,288	13,056	9,797	13,056	3,259	3,259	9,797
Office Expense	25,082	25,600	29,264	25,600	(3,664)	(3,664)	29,264
Credit Card/Bank Fees	17,916	18,700	25,780	18,700	(7,080)	(7,080)	25,780
Memberships	523	1,000	-	1,000	1,000	1,000	-
Taxes Business	25	500	25	500	475	475	25
Depreciation Furn/Amortization Exp	10,258	6,233	11,421	6,233	(5,188)	(5,188)	11,421
Total Expense	573,293	616,185	628,153	616,185	(11,968)	(11,968)	628,153
Net Profit/Loss	(517,781)	(566,185)	(515,401)	(566,185)	50,784	50,784	(515,401)

## IIMC Financials

FISCAL YEAR 2024

Building

December 31, 2024

Description	Prior YR Actual	Annual Budget	YTD Actual	YTD Budget	YTD Variance	Annual Variance	Annual Projections
<b>INCOME</b>							
Rental Income	63,162	65,987	65,987	65,987	0	0	65,987
Total Income	63,162	65,987	65,987	65,987	0	0	65,987
<b>EXPENSES</b>							
Amortize Loan Costs	736	500	736	500	(236)	(236)	736
Association Fees	2,200	2,220	2,600	2,220	(380)	(380)	2,600
Depreciation Building	24,626	23,500	24,882	23,500	(1,382)	(1,382)	24,882
Insurance Fire/Property	4,252	4,500	4,448	4,500	52	52	4,448
Mortgage Interest	18,634	17,747	18,142	17,747	(395)	(395)	18,142
Property Tax	18,333	19,000	18,718	19,000	282	282	18,718
Building Repairs and Maint	34,148	34,200	78,553	34,200	(44,353)	(44,353)	78,553
Utilities	16,570	16,000	16,677	16,000	(677)	(677)	16,677
Property Manager	6,950	7,500	600	7,500	6,900	6,900	600
Allocation to Bldg Reserve	-	1,000	-	1,000	1,000	1,000	-
Commissions/Appraisals	11,487	-	-	-	-	-	-
Total Expense	137,937	126,167	165,356	126,167	(39,189)	(39,189)	165,356
Net Profit/Loss	(74,774)	(60,180)	(99,368)	(60,180)	(39,188)	(39,188)	(99,368)

## IIMC Financials

FISCAL YEAR 2024

Committees

December 31, 2024

Description	Prior YR Actual	Annual Budget	YTD Actual	YTD Budget	YTD Variance	Annual Variance	Annual Projections
<b>EXECUTIVE COMMITTEE:</b>							
Meeting Expenses	206	100	-	100	100	100	-
Travel	21,618	33,300	28,962	33,300	4,338	4,338	28,962
Total Executive Committee Expense	21,825	33,400	28,962	33,400	4,438	4,438	28,962
<b>BOARD OF DIRECTORS:</b>							
<i>General</i>							
Region XI Consultant	12,793	11,500	9,847	11,500	1,653	1,653	9,847
Region X Consultant	-	3,000	-	3,000	3,000	3,000	-
Insurance Officers & Directors	3,148	3,200	3,164	3,200	36	36	3,164
Legal Fees	-	1,500	14,751	1,500	(13,251)	(13,251)	14,751
Strategic Planning/Board Development	10,736	8,000	11,139	8,000	(3,139)	(3,139)	11,139
Memorials	400	500	-	500	500	500	-
Parliamentarian Expense	9,192	9,200	4,499	9,200	4,701	4,701	4,499
Other Expenses	62	1,050	150	1,050	900	900	150
General	36,332	37,950	43,550	37,950	(5,600)	(5,600)	43,550
<i>Mid-Year</i>							
Travel	92,512	68,500	82,386	68,500	(13,886)	(13,886)	82,386
Meeting Expense	14,109	3,000	12,592	3,000	(9,592)	(9,592)	12,592
Mid-Year	106,621	71,500	94,978	71,500	(23,478)	(23,478)	94,978
<i>Conference</i>							
Travel	10,707	20,000	16,937	20,000	3,063	3,063	16,937
Board Meeting Expense	32,589	11,000	13,335	11,000	(2,335)	(2,335)	13,335
Conference	43,297	31,000	30,272	31,000	728	728	30,272
Total Board of Directors Expense	186,249	140,450	168,800	140,450	(28,350)	(28,350)	168,800
<b>OTHER COMMITTEES</b>							
BUDGET & PLANNING	13,148	13,700	17,433	13,700	(3,733)	(3,733)	17,433
CONFERENCE POLICY	-	25	-	25	25	25	-
EDUCATION / PROFESSIONAL DEVELOPMENT	-	25	-	25	25	25	-
ELECTION	-	25	-	25	25	25	-
INTERNATIONAL RELATIONS	-	25	-	25	25	25	-
POLICY REVIEW	-	25	-	25	25	25	-
MEMBERSHIP	-	200	-	200	200	200	-
PUBLIC RELATIONS	0	25	(0)	25	25	25	-
RECORDS MANAGEMENT	-	1,525	-	1,525	1,525	1,525	-
RESEARCH	-	25	-	25	25	25	-
RESOURCE & INFORMATION	-	25	-	25	25	25	-
Total Other Committees Expense	13,148	15,625	17,433	15,625	(1,808)	(1,808)	17,433
<b>Executive Committee</b>	21,825	33,400	28,962	33,400	4,438	4,438	28,962
<b>Board of Directors</b>	186,249	140,450	168,800	140,450	(28,350)	(28,350)	168,800
<b>Other Committees</b>	13,148	15,625	17,433	15,625	(1,808)	(1,808)	17,433
<b>Total Expense</b>	221,222	189,475	215,195	189,475	(25,720)	(25,720)	215,195
<b>Net Profit/Loss</b>	(221,222)	(189,475)	(215,195)	(189,475)	25,720	25,720	(215,195)

## IIMC Financials

FISCAL YEAR 2024

Conference

December 31, 2024

Description	Prior Yr Actual	Annual Budget	YTD Actual	YTD Budget	YTD Variance	Annual Variance	Annual Projections
<b>INCOME</b>							
Registration Members-Full	337,440	438,750	332,680	438,750	(106,070)	(106,070)	332,680
Registration Discounts	(725)	(71,220)	-	(71,220)	71,220	71,220	-
Registration Guest	7,075	20,650	10,740	20,650	(9,910)	(9,910)	10,740
Donations & Sponsorships	70,231	66,350	66,350	66,350	-	-	66,350
Exhibitor Program	21,000	30,000	22,100	30,000	(7,900)	(7,900)	22,100
Cancellation Fee	3,799	5,000	-	5,000	(5,000)	(5,000)	-
Misc Conference Revenue	65,471	32,000	100,242	32,000	68,242	68,242	100,242
Academy Workshop	28,938	36,695	29,256	36,695	(7,439)	(7,439)	29,256
Athenian Leadership Society	6,955	9,020	5,410	9,020	(3,610)	(3,610)	5,410
Offsite Education Program	4,440	10,000	-	10,000	(10,000)	(10,000)	-
Total Income	547,505	577,245	566,778	577,245	(10,467)	(467)	566,778
<b>EXPENSES</b>							
Conference Planner	109,543	101,270	83,082	101,270	18,188	18,188	83,082
Academy Expenses	21,021	23,650	24,921	23,650	(1,271)	(1,271)	24,921
General/Plenary Speakers Expenses	24,197	34,300	23,292	34,300	11,008	11,008	23,292
Speaker Expenses	36,954	63,000	55,365	63,000	7,635	7,635	55,365
Staff Conference Travel	22,898	26,800	25,764	26,800	1,036	1,036	25,764
VIP Travel	8,864	13,500	14,232	13,500	(732)	(732)	14,232
Conference Events	89,175	61,000	58,396	61,000	2,604	2,604	58,396
Food & Beverage	230,121	175,000	171,576	175,000	3,424	3,424	171,576
Audio/Visual	92,921	80,000	99,911	80,000	(19,911)	(19,911)	99,911
Conference Printing/Design Work	4,877	7,500	4,998	7,500	2,502	2,502	4,998
Conference Expense	48,758	65,700	108,878	65,700	(43,178)	(43,178)	108,878
Total Expense	689,328	651,720	670,414	651,720	(18,694)	(18,694)	670,414
Net Profit/Loss	(141,823)	(74,475)	(103,636)	(74,475)	(29,161)	(29,161)	(103,636)

## IIMC Financials

FISCAL YEAR 2024

Education

December 31, 2024

Description	Prior Yr Actual	Annual Budget	YTD Actual	YTD Budget	YTD Variance	Annual Variance	Annual Projections
<b>INCOME:</b>							
Foundation Contribution/Policy 8	26,999	25,000	43,067	25,000	18,067	18,067	43,067
Fees CMC	56,270	58,000	52,200	58,000	(5,800)	(5,800)	52,200
MMC Fees	58,075	50,000	59,030	50,000	9,030	9,030	59,030
<i>EPP Fees</i>	15,400	-	-	-	-	-	-
Sales Pins and Plaques	5,295	12,600	(2,375)	12,600	(14,975)	(14,975)	(2,375)
Distance Ed Registration	101,028	100,000	151,674	100,000	51,674	51,674	151,674
New Institute Application Fees	300	300	300	300	-	-	300
Region XI Symposium	140,766	-	-	-	-	-	-
Total Income	404,133	245,900	303,896	245,900	57,996	57,996	303,896
<b>EXPENSES:</b>							
Personnel Costs	246,223	296,408	288,830	296,408	7,578	7,578	288,830
Staff Travel	2,207	3,100	1,661	3,100	1,439	1,439	1,661
Professional Develop/Training	1,475	2,000	-	2,000	2,000	2,000	-
MCEF - Region Stipends	8,000	11,000	7,000	11,000	4,000	4,000	7,000
Region XI Symposium	140,787	-	-	-	-	-	-
Distance Ed	12,600	24,000	30,800	24,000	(6,800)	(6,800)	30,800
Pins and Plaques	1,558	9,000	6,264	9,000	2,736	2,736	6,264
Computer/Software Support	4,151	5,000	22,963	5,000	(17,963)	(17,963)	22,963
Office Expenses	15,796	12,000	4,508	12,000	7,492	7,492	4,508
Bank Fees	7,761	10,000	9,037	10,000	963	963	9,037
Total Expense	440,559	372,508	371,063	372,508	1,445	1,445	371,063
Net Profit/Loss	(36,425)	(126,608)	(67,167)	(126,608)	59,441	59,441	(67,167)

## IIMC Financials

FISCAL YEAR 2024

Marketing

December 31, 2024

Description	Prior Yr Actual	Annual Budget	YTD Actual	YTD Budget	YTD Variance	Annual Variance	Annual Projections
<b>INCOME</b>							
Advertising	30,564	27,250	29,496	27,250	2,246	2,246	29,496
Royalty	84	200	-	200	(200)	(200)	-
Mailing Lists	1,750	500	875	500	375	375	875
Publications	393	800	322	800	(478)	(478)	322
Total Income	32,791	28,750	30,693	28,750	1,943	1,943	30,693
<b>EXPENSES</b>							
Personnel	133,837	152,556	152,284	152,556	272	272	152,284
Staff Travel	2,075	2,000	366	2,000	1,634	1,634	366
Professional Development	-	300	-	300	300	300	-
Bank Fees	66	30	130	30	(100)	(100)	130
Awards & Gifts	2,893	3,000	-	3,000	3,000	3,000	-
Design Work (non conference)	-	500	20	500	480	480	20
Postage and Shipping	-	100	-	100	100	100	-
Exhibit/Sponsorship	149	3,500	-	3,500	3,500	3,500	-
Design/News Digest/Misc	7,087	8,500	7,316	8,500	1,184	1,184	7,316
Printing - Publications	-	500	1,116	500	(616)	(616)	1,116
Total Expense	146,108	170,786	161,233	170,786	9,553	9,553	161,233
Net Profit/Loss	(113,316)	(142,036)	(130,540)	(142,036)	11,496	11,496	(130,540)

## IIMC Financials

FISCAL YEAR 2024

Membership

December 31, 2024

Description	Prior Yr Actual	Annual Budget	YTD Actual	YTD Budget	YTD Variance	Annual Variance	Annual Projections
<b>INCOME</b>							
Membership Dues	1,434,492	1,450,000	1,489,888	1,450,000	39,888	39,888	1,489,888
Membership Late Fee	4,875	5,000	6,730	5,000	1,730	1,730	6,730
Total Income	<u>1,439,367</u>	<u>1,455,000</u>	<u>1,496,618</u>	<u>1,455,000</u>	<u>41,618</u>	<u>41,618</u>	<u>1,496,618</u>
<b>EXPENSES</b>							
Personnel	210,464	216,825	257,231	216,825	(40,406)	(40,406)	257,231
Staff Travel	2,005	2,450	3,916	2,450	(1,466)	(1,466)	3,916
Professional Develop/Training	1,260	400	-	400	400	400	-
Membership Drive	7,176	10,500	9,413	10,500	1,087	1,087	9,413
Research Salary Survey Services	1,428	1,500	1,428	1,500	72	72	1,428
Dues Mailing	23,189	23,000	10,547	23,000	12,453	12,453	10,547
Computer/Software Support	8,379	8,200	18,379	8,200	(10,179)	(10,179)	18,379
Office Expense	1,316	1,800	208	1,800	1,592	1,592	208
Bank Fees	26,170	30,000	24,018	30,000	5,982	5,982	24,018
Membership	441	400	359	400	41	41	359
Total Expense	<u>281,827</u>	<u>295,075</u>	<u>325,498</u>	<u>295,075</u>	<u>(30,423)</u>	<u>(30,423)</u>	<u>325,498</u>
Net Profit/Loss	<u>1,157,540</u>	<u>1,159,925</u>	<u>1,171,120</u>	<u>1,159,925</u>	<u>11,195</u>	<u>11,195</u>	<u>1,171,120</u>



Schwab One® Account of

THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CLERKS

Account Number  
9755-7195

Statement Period  
December 1-31, 2024

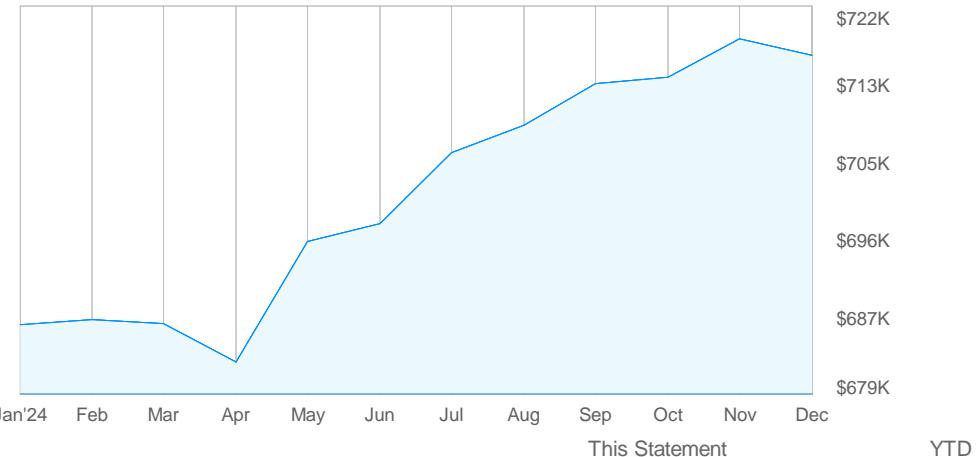
## Account Summary

Ending Account Value as of 12/31

**\$716,719.18**

Beginning Account Value as of 12/01

**\$718,564.68**



Jan'24 Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec  
This Statement YTD

### Your Independent Investment Manager and/or Advisor

URBAN WEALTH MGMT GROUP LLC  
841 APOLLO ST STE 320  
EL SEGUNDO CA 90245-4819  
1 (424) 277-2260

The custodian of your brokerage account is:  
Charles Schwab & Co., Inc. Member SIPC. Your  
independent Investment Advisor is not affiliated  
with or an agent of Schwab and Schwab does not  
supervise or endorse your Advisor.

### Online Assistance

Visit us online at [schwab.com](http://schwab.com)

Visit [schwab.com/stmt](http://schwab.com/stmt) to explore the features  
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MUNICIPAL CLERKS  
8331 UTICA AVE STE 200  
RANCHO CUCAMONGA CA 91730-7600

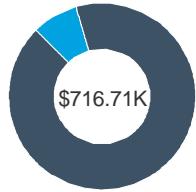
Beginning Value	<b>\$718,564.68</b>	\$506,495.75
Deposits	<b>0.00</b>	239,264.59
Withdrawals	<b>0.00</b>	(60,000.00)
Dividends and Interest	<b>2,251.11</b>	34,933.38
Transfer of Securities	<b>0.00</b>	0.00
Market Appreciation/(Depreciation)	<b>(3,944.45)</b>	(2,105.81)
Expenses	<b>(152.16)</b>	(1,868.73)
<b>Ending Value</b>	<b>\$716,719.18</b>	<b>\$716,719.18</b>

Account Ending Value reflects the market value of your cash and investments. It does not include pending transactions, unpriced securities or assets held outside Schwab's custody.

## Schwab One® Account of

THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CLERKS

## Asset Allocation



## Top Account Holdings This Period

SYMBOL CUSIP	Description	Market Value	% of Accounts
949764NY6	WELLS FARGO BANK,	100,364.10	14%
61768E3T8	MORGAN STANLEY P	100,267.70	14%
	CHARLES SCHWAB BANK	58,784.02	8%
10922NAG8	BRIGHTHOUSE FIN	50,898.40	7%
785931AA4	SAFEHOLD GL HOLDI	50,689.15	7%

## Gain or (Loss) Summary

	Short-Term (ST)		Long-Term (LT)			
	Gain	(Loss)	Net	Gain	(Loss)	Net
This Period	0.00	(366.30)	(366.30) <sup>b</sup>	0.00	0.00	0.00
YTD	0.00	(245.92)	(245.92)	0.00	0.00	0.00

## Unrealized

**\$468.68<sup>b</sup>**

Values may not reflect all of your gains/losses and may be rounded up to the nearest dollar; Schwab has provided accurate gain and loss information wherever possible for most investments. Cost basis may be incomplete or unavailable for some of your holdings and may change or be adjusted in certain cases. Please login to your account at Schwab.com for real-time gain/loss information. Statement information should not be used for tax preparation, instead refer to official tax documents. For additional information refer to Terms and Conditions.

Statement Period

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## Income Summary

Federal Tax Status	This Period		YTD	
	Tax-Exempt	Taxable	Tax-Exempt	Taxable
Bank Sweep Interest	0.00	1.11	0.00	143.80
Corporate Bond and Other Interest	0.00	2,250.00	0.00	19,591.77
Certificate of Deposit Interest	0.00	0.00	0.00	15,197.81
<b>Total Income</b>	<b>\$0.00</b>	<b>\$2,251.11</b>	<b>\$0.00</b>	<b>\$34,933.38</b>
Accrued Interest Paid <sup>4</sup>	0.00	0.00	0.00	(3,989.79)

<sup>4</sup> Certain accrued interest paid on taxable bonds may be deductible; consult your tax advisor



## Schwab One® Account of

THE INTERNATIONAL INSTITUTE OF  
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### A Message About Your Account

#### CALIFORNIA RESIDENTS

If your total payments of interest and interest dividends on federally tax-exempt non-California municipal bonds were \$10 or greater **and** you or your Partnership had a California address as of 12/31, Schwab will report this information to the California Franchise Tax Board each tax year, per state statute. (1223-3LZ0)

### Positions - Summary

Beginning Value as of 12/01	Transfer of Securities(In/Out)	Dividends Reinvested	Cash Activity	Change in Market Value	=	Ending Value as of 12/31	Cost Basis	Unrealized Gain/(Loss)
\$718,564.68	\$0.00	\$0.00	\$2,098.95	(\$3,944.45)	=	\$716,719.18	\$657,466.48	\$468.68 <sup>b</sup>

Values may not reflect all of your gains/losses; Schwab has provided accurate gain and loss information wherever possible for most investments. Cost basis may be incomplete or unavailable for some of your holdings and may change or be adjusted in certain cases. Statement information should not be used for tax preparation, instead refer to official tax documents. For additional information refer to Terms and Conditions.

### Cash and Cash Investments

Type	Symbol	Description	Quantity	Price(\$)	Beginning Balance(\$)	Ending Balance(\$)	Change in Period Balance(\$)	Pending/Unsettled Cash(\$)	Interest/ Yield Rate	% of Acct
Bank Sweep		CHARLES SCHWAB BANK <sup>X,Z</sup>			6,685.07	58,784.02	52,098.95		0.05%	8%
<b>Total Cash and Cash Investments</b>					<b>\$6,685.07</b>	<b>\$58,784.02</b>	<b>\$52,098.95</b>			<b>8%</b>

### Positions - Fixed Income

Symbol/ CUSIP	Description	Maturity Coupon Date	Quantity/Par	Price(\$)	Market Value(\$)	Adj Cost Basis/ Orig Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Yield to Maturity	Est. Annual Income(\$)	Accrued Income(\$)	% of Acct
524901AV7	LEGG MASON, INC. Moody's: A2 S&P: A	4.75% 03/15/26	40,000.0000	99.98470	39,993.88	40,343.20 40,343.20	(349.32)	4.13%	1,900.00	559.44	6%
17290AJA9	CITIGROUP INC. Moody's: A3 S&P: BBB+ CALLABLE 02/15/25 AT 100.00000	5.2% 05/15/26	50,000.0000	100.09050	50,045.25	50,000.00 50,000.00	45.25	5.20%	2,600.00	332.22	7%
665859AW4	NORTHERN TRUST CORP Moody's: A2 S&P: A+ CALLABLE 04/10/27 AT 100.00000	4.0% 05/10/27	40,000.0000	98.46610	39,386.44	40,074.03 40,075.60	(687.59) <sup>b</sup>	3.92%	1,600.00	226.67	5%
06376AHL7	BANK OF MONTREAL 5% Moody's: A2 S&P: NR CALLABLE 02/23/25 AT 100.00000	5.0% 08/23/27	40,000.0000	99.32420	39,729.68	40,112.00 40,112.00	(382.32)	4.89%	2,000.00	711.11	6%



## Schwab One® Account of

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## Positions - Fixed Income (continued)

Symbol/ CUSIP	Description	Maturity Coupon Date	Quantity/Par	Price(\$)	Market Value(\$)	Adj Cost Basis/ Orig Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Yield to Maturity	Est. Annual Income(\$)	Accrued Income(\$)	% of Acct	
55616XAC1	MACY'S INC Moody's: Ba2 S&P: BB+	7.0% 02/15/28	25,000.0000	100.50000	25,125.00	24,736.75 24,736.75	388.25	7.31%	1,750.00	661.11	4%	
13607XP76	CANADIAN IMPERIAL 6% Moody's: A2 S&P: A- CALLABLE 12/08/25 AT 100.00000	6.0% 12/08/28	50,000.0000	100.39890	50,199.45	50,350.55 50,409.50	(151.10) <sup>b</sup>	5.80%	3,000.00	191.67	7%	
10922NAG8	BRIGHTHOUSE FIN Moody's: Baa3 S&P: BBB+ CALLABLE 02/15/30 AT 100.00000	5.625% 05/15/30	50,000.0000	101.79680	50,898.40	50,090.91 50,098.00	807.49 <sup>b</sup>	5.59%	2,812.50	359.38	7%	
06055JGD5	BANK OF AMERICA COR Moody's: A1 S&P: A- CALLABLE 03/19/25 AT 100.00000	5.0% 09/19/30	50,000.0000	97.37300	48,686.50	49,925.00 49,925.00	(1,238.50)	5.03%	2,500.00	708.33	7%	
04686JAG6	ATHENE HOLDING Moody's: Baa1 S&P: A- CALLABLE 10/15/33 AT 100.00000	5.875% 01/15/34	50,000.0000	101.10750	50,553.75	49,775.50 49,775.50	778.25	5.93%	2,937.50	1,354.51	7%	
785931AA4	SAFEHOLD GL HOLDI Moody's: A3 S&P: NR CALLABLE 01/01/34 AT 100.00000	6.1% 04/01/34	50,000.0000	101.37830	50,689.15	49,958.00 49,958.00	731.15	6.11%	3,050.00	762.50	7%	
38150AY33	THE GOLDMAN SACH Moody's: A2 S&P: BBB+ CALLABLE 02/15/25 AT 100.00000	6.25% 02/15/36	12,000.0000	99.96550	11,995.86	12,100.54 12,102.24	(104.68) <sup>b</sup>	6.15%	750.00	283.33	2%	
61768E3T8	MORGAN STANLEY P Moody's: NR S&P: NR	5.15% 05/15/25	100,000.0000	100.26770	100,267.70	100,000.00 100,000.00	267.70	5.15%	N/A	3,259.32	14%	
949764NY6	WELLS FARGO BANK, Moody's: NR S&P: NR	5.3% 05/29/25	100,000.0000	100.36410	100,364.10	100,000.00 100,000.00	364.10	5.30%	N/A	3,150.96	14%	
<b>Total Fixed Income</b>			<b>657,000.0000</b>		<b>\$657,935.16</b>				<b>\$468.68</b>	<b>\$24,900.00</b>	<b>\$12,560.55</b>	<b>92%</b>

Accrued Income represents the interest that would be received if the fixed income investment was sold prior to the coupon payment.

Yield to Maturity is the annualized rate of return earned if held until maturity date.

## Transactions - Summary

Beginning Cash* as of 12/01	+	Deposits	+	Withdrawals	+	Purchases	+	Sales/Redemptions	+	Dividends/Interest	+	Expenses	= Ending Cash* as of 12/31
<b>\$6,685.07</b>		<b>\$0.00</b>		<b>\$0.00</b>		<b>\$0.00</b>		<b>\$50,000.00</b>		<b>\$2,251.11</b>		<b>(\$152.16)</b>	<b>\$58,784.02</b>

Other Activity **\$0.00**

Other activity includes transactions which don't affect the cash balance such as stock transfers, splits, etc.

\*Cash (includes any cash debit balance) held in your account plus the value of any cash invested in a sweep money fund.



## Schwab One® Account of

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### Transaction Details

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share(\$)	Charges/ Interest(\$)	Amount(\$)	Realized Gain/(Loss)(\$)
12/05	Expense	Advisor Fee *		TO ADVISOR				(152.16)	
12/09	Interest	Bond Interest	13607XP76	CANADIAN IMPERIAL 6% 28F				1,500.00	
12/11	Redemption		89114XCP6	THE TORONTO-DOMINI6% 28F **CALLED**				50,000.00	
	Other Activity	Call Redemption	89114XCP6	THE TORONTO-DOMINI6% 28F **CALLED**	(50,000.0000)				
	Interest	Bond Interest	89114XCP6	THE TORONTO-DOMINI6% 28F				750.00	
12/16	Interest	Bank Interest <sup>X,Z</sup>		BANK INT 111624-121524				1.11	
<b>Total Transactions</b>								<b>\$52,098.95</b>	<b>\$0.00</b>

Date column represents the Settlement/Process date for each transaction.

### Bank Sweep Activity

Date	Description	Amount	Date	Description	Amount
12/01	<b>Beginning Balance <sup>X,Z</sup></b>	<b>\$6,685.07</b>	12/15	BANK INTEREST - CHARLES SCHWAB BANK <sup>X,Z</sup>	1.11
12/06	BANK TRANSFER TO BROKERAGE	(152.16)	12/31	<b>Ending Balance <sup>X,Z</sup></b>	<b>\$58,784.02</b>
12/10	BANK CREDIT FROM BROKERAGE <sup>X</sup>	1,500.00	12/31	<b>Interest Rate <sup>*Z</sup></b>	<b>0.05%</b>
12/12	BANK CREDIT FROM BROKERAGE <sup>X</sup>	50,750.00			

\* Your interest period was 11/16/24 - 12/15/24. <sup>Z</sup>

### Endnotes For Your Account

- \* You authorize Schwab to debit your account to pay investment management fees per the authorization you granted in your Account Application. Schwab does not review or monitor these fee payments. Contact your Investment Manager if you have questions.
- b When available, Adjusted Cost Basis values are used in Gain or (Loss) calculations.
- X Bank Sweep deposits are held at FDIC-insured Program Banks, which are listed in the Cash Features Disclosure Statement.

- Z For the Bank Sweep and Bank Sweep for Benefit Plans features, interest is paid for a period that differs from the Statement Period. Balances include interest paid as indicated on your statement by Schwab or one or more of its Program Banks. These balances do not include interest that may have accrued during the Statement Period after interest is paid. The interest paid may include interest that accrued in the prior Statement Period.



## Schwab One® Account of

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MUNICIPAL CLERKS

## Terms and Conditions

**GENERAL INFORMATION AND KEY TERMS:** This Account statement is furnished solely by Charles Schwab & Co., Inc. ("Schwab") for your Account at Schwab ("Account"). Unless otherwise defined herein, capitalized terms have the same meanings as in your Account Agreement. If you receive any other communication from any source other than Schwab which purports to represent your holdings at Schwab (including balances held at a Depository Institution) you should verify its content with this statement.

**Accrued Income:** Accrued Income is the sum of the total accrued interest and/or accrued dividends on positions held in your Account, but the interest and/or dividends have not been received into your Account. Schwab makes no representation that the amounts shown (or any other amount) will be received. Accrued amounts are not covered by SIPC account protection until actually received and held in the Account. **AIP (Automatic Investment Plan) Customers:** Schwab receives remuneration in connection with certain transactions effected through Schwab. If you participate in a systematic investment program through Schwab, the additional information normally detailed on a trade confirmation will be provided upon request.

**Average Daily Balance:** Average daily composite of all cash balances that earn interest and all loans from Schwab that are charged interest. **Bank Sweep and Bank Sweep for Benefit Plans Features:** Schwab acts as your agent and custodian in establishing and maintaining your Deposit Account(s) as a feature of your brokerage Account(s). Deposit accounts held through these bank sweep features constitute direct obligations of one or more FDIC insured banks ("Program Banks") that are not obligations of Schwab. Funds swept to Program Banks are eligible for deposit insurance from the FDIC up to the applicable limits for each bank for funds held in the same insurable capacity. The balance in the Deposit Accounts can be withdrawn on your order and the proceeds returned to your brokerage Account or remitted to you as provided in your Account Agreement. For information on FDIC insurance and its limits, as well as other important disclosures about the bank sweep feature(s) in your Account(s), please refer to the Cash Features Disclosure Statement available online or from a Schwab representative. **Cash:** Any Free Credit Balance owed by us to you payable upon demand which, although accounted for on our books of record, is not segregated and may be used in the conduct of this firm's business. **Dividend Reinvestment Customers:**

Dividend reinvestment transactions were effected by Schwab acting as a principal for its own account, except for the reinvestment of Schwab dividends, for which an independent broker-dealer acted as the buying agent. Further information on these transactions will be furnished upon written request. **Gain (or Loss):** Unrealized Gain or (Loss) and Realized Gain or (Loss) sections ("Gain/Loss Section(s)") contain a gain or a loss summary of your Account. This information has been provided on this statement at the request of your Advisor, if applicable. This information is not a solicitation or a recommendation to buy or sell. **Schwab does not provide tax advice and encourages you to consult with your tax professional. Please view the Cost Basis Disclosure Statement for additional information on how gain (or loss) is calculated and how Schwab reports adjusted cost basis information to the IRS.**

**Interest:** For the Schwab One Interest, Bank Sweep, and Bank Sweep for Benefit Plans features, interest is paid for a period that may differ from the Statement Period. Balances include interest paid as indicated on your statement by Schwab or one or more of its Program Banks. These balances do not include interest that may have accrued during the Statement Period after interest is paid. The interest paid may include interest that accrued in the prior Statement Period. For the Schwab One Interest feature, interest accrues daily from the second-to-last business day of the prior month and is posted on the second-to-last business day of the current month. For the Bank Sweep and Bank Sweep for Benefit Plans features, interest accrues daily from the 16th day of the prior month and is credited/posted on the first business day after the 15th of the current month. If, on any given day, the interest that Schwab calculates for the Free Credit Balances in the Schwab One Interest feature in your brokerage Account is less than \$.005, you will not accrue any interest on that day. For balances held at banks affiliated with Schwab in the Bank Sweep and Bank Sweep for Benefit Plans features, interest will accrue even if the amount is less than \$.005. **Margin Account Customers:** This is a combined statement of your margin account and special memorandum account maintained for you under Section 220.5 of Regulation T issued by the Board of Governors of the Federal Reserve System. The

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December 1-31, 2024

permanent record of the separate account as required by Regulation T is available for your inspection. Securities purchased on margin are Schwab's collateral for the loan to you. It is important that you fully understand the risks involved in trading securities on margin. These risks include: 1) You can lose more funds than you deposit in the margin account; 2) Schwab can force the sale of securities or other assets in any of your account(s) to maintain the required account equity without contacting you; 3) You are not entitled to choose which assets are liquidated nor are you entitled to an extension of time on a margin call; 4) Schwab can increase its "house" maintenance margin requirements at any time without advance written notice to you. **Market Price:** The most recent price evaluation available to Schwab on the last business day of the report period, normally the last trade price or bid as of market close. Unpriced securities denote that no market evaluation update is currently available. Price evaluations are obtained from outside parties. Schwab shall have no responsibility for the accuracy or timeliness of any such valuations. Assets Not Held at Schwab are not held in your Account or covered by the Account's SIPC account protection and are not otherwise in Schwab's custody and are being provided as a courtesy to you. Information on Assets Not Held at Schwab, including but not limited to valuations, is reported solely based on information you provide to Schwab. Schwab can neither validate nor certify the existence of Assets Not Held at Schwab or the accuracy, completeness or timeliness of the information about Assets Not Held at Schwab, whether provided by you or otherwise. Descriptions of Assets Not Held at Schwab may be abbreviated or truncated. Some securities, especially thinly traded equities in the OTC market or foreign markets, may not report the most current price and are indicated as Stale Priced. Certain Limited Partnerships (direct participation programs) and unlisted Real Estate Investment Trust (REIT) securities, for which you may see a value on your monthly Account statement that reflects the issuer's appraised estimated value, are not listed on a national securities exchange, and are generally illiquid. Even if you are able to sell such securities, the price received may be less than the per share appraised estimated value provided in the account statement.

**Market Value:** The Market Value is computed by multiplying the Market Price by the Quantity of Shares. This is the dollar value of your present holdings in your specified Schwab Account or a summary of the Market Value summed over multiple accounts. **Non-Publicly Traded Securities:** All assets shown on this statement, other than certain direct investments which may be held by a third party, are held in your Account. Values of certain Non-Publicly Traded Securities may be furnished by a third party as provided by Schwab's Account Agreement. Schwab shall have no responsibility for the accuracy or timeliness of such valuations. The Securities Investor Protection Corporation (SIPC) does not cover many limited partnership interests.

**Schwab Sweep Money Funds:** Includes the primary money market funds into which Free Credit Balances may be automatically invested pursuant to your Account Agreement. Schwab or an affiliate acts and receives compensation as the Investment Advisor, Shareholder Service Agent and Distributor for the Schwab Sweep Money Funds. The amount of such compensation is disclosed in the prospectus. The yield information for Schwab Sweep Money Funds is the current 7-day yield as of the statement period. Yields vary. If on any given day, the accrued daily dividend for your selected sweep money fund as calculated for your account is less than 1/2 of 1 cent (\$.005), your account will not earn a dividend for that day. In addition, if you do not accrue at least 1 daily dividend of \$.01 during a pay period, you will not receive a money market dividend for that period. Schwab and the Schwab Sweep Money Funds investment advisor may be voluntarily reducing a portion of a Schwab Sweep Money Fund's expenses. Without these reductions, yields would have been lower. **Securities Products and Services:** Securities products and services are offered by Charles Schwab & Co., Inc., Member SIPC. Securities products and services, including unswept intraday funds and net credit balances held in brokerage accounts are not deposits or other obligations of, or guaranteed by, any bank, are not FDIC insured, and are subject to investment risk and may lose value. SIPC does not cover balances held at Program Banks in the Bank Sweep and Bank Sweep for Benefit Plans features. Please see your Cash Feature Disclosure Statement for more information on insurance coverage. **Yield to Maturity:** This is the actual average annual return on a note if held to maturity. **IN CASE OF ERRORS OR DISCREPANCIES:** If you find an error or discrepancy relating to your

## Schwab One® Account of

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## Terms and Conditions (continued)

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**Address Changes:** If you fail to notify Schwab in writing of any change of address or phone number, you may not receive important notifications about your Account, and trading or other restrictions might be placed on your Account. **Additional Information:** We are required by law to report to the Internal Revenue Service adjusted cost basis information (if applicable), certain payments to you and credits to your Account during the calendar year. Retain this statement for income tax purposes. A financial statement for your inspection is available at Schwab's offices or a copy will be mailed to you upon written request. Any third-party trademarks appearing herein are the property of their respective owners. Charles Schwab & Co., Inc., Charles Schwab Bank, Charles Schwab Premier Bank, and Charles Schwab Trust Bank are separate but affiliated companies and subsidiaries of the Charles Schwab Corporation. © 2025 Charles Schwab & Co., Inc. ("Schwab"). All rights reserved. **Member SIPC.** (01CUSTNC) (0822-20UL)

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### Your Independent Investment Manager and/or Advisor

URBAN WEALTH MGMT GROUP LLC  
841 APOLLO ST STE 320  
EL SEGUNDO CA 90245-4819  
1 (424) 277-2260

The custodian of your brokerage account is:  
Charles Schwab & Co., Inc. Member SIPC. Your  
independent Investment Advisor is not affiliated  
with or an agent of Schwab and Schwab does not  
supervise or endorse your Advisor.

### Managed Account Details

**Money Manager**  
Envestnet Asset Management Inc  
**Investment Strategy**  
Envestnet Unified Managed Account

### Online Assistance

Visit us online at [schwab.com](http://schwab.com)

Visit [schwab.com/stmt](http://schwab.com/stmt) to explore the features  
and benefits of this statement.

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8331 UTICA AVE STE 200  
RANCHO CUCAMONGA CA 91730-7600

### Account Summary

Ending Account Value as of 12/31

**\$217,711.59**

Beginning Account Value as of 12/01

**\$224,916.18**



	This Statement	YTD
Beginning Value	<b>\$224,916.18</b>	\$208,445.60
Deposits	<b>0.00</b>	0.00
Withdrawals	<b>0.00</b>	0.00
Dividends and Interest	<b>1,606.02</b>	4,845.85
Transfer of Securities	<b>0.00</b>	0.00
Market Appreciation/(Depreciation)	<b>(8,667.73)</b>	6,089.98
Expenses	<b>(142.88)</b>	(1,669.84)
<b>Ending Value</b>	<b>\$217,711.59</b>	<b>\$217,711.59</b>

Account Ending Value reflects the market value of your cash and investments. It does not include pending transactions, unpriced securities or assets held outside Schwab's custody.



## Schwab One® Account of

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### Asset Allocation



	This Period	Current Allocation
Cash and Cash Investments	6,831.45	3%
Mutual Funds	44,093.90	20%
Exchange Traded Funds	166,786.24	77%
<b>Total</b>	<b>\$217,711.59</b>	<b>100%</b>

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### Income Summary

Federal Tax Status	This Period		YTD	
	Tax-Exempt	Taxable	Tax-Exempt	Taxable
Bank Sweep Interest	0.00	0.54	0.00	21.67
Cash Dividends	0.00	1,605.48	0.00	4,824.18
<b>Total Income</b>	<b>\$0.00</b>	<b>\$1,606.02</b>	<b>\$0.00</b>	<b>\$4,845.85</b>

### Top Account Holdings This Period

SYMBOL CUSIP	Description	Market Value	% of Accounts
NTBIX	NAVIGATOR TACTICAL FIXED ...	44,093.90	20%
SPYG	SPDR S&P 500 GROWTH ETF	25,315.20	12%
DBEF	XTRACKERS MSCI EAFE HDGD	17,636.40	8%
SKYY	FIRST TRUST CLOUD	16,438.56	8%
IWY	ISHARES RUSSELL TOP 200	12,939.85	6%

### Gain or (Loss) Summary

	Short-Term (ST)			Long-Term (LT)		
	Gain	(Loss)	Net	Gain	(Loss)	Net
This Period	2,204.14	(1,474.19)	729.95	0.00	0.00	0.00
YTD	14,495.61	0.00	14,495.61	0.00	0.00	0.00
<b>Unrealized</b>	<b>\$39.53</b>					

Values may not reflect all of your gains/losses and may be rounded up to the nearest dollar; Schwab has provided accurate gain and loss information wherever possible for most investments. Cost basis may be incomplete or unavailable for some of your holdings and may change or be adjusted in certain cases.

Please login to your account at Schwab.com for real-time gain/loss information. Statement information should not be used for tax preparation, instead refer to official tax documents. For additional information refer to Terms and Conditions.



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## A Message About Your Account

### CALIFORNIA RESIDENTS

If your total payments of interest and interest dividends on federally tax-exempt non-California municipal bonds were \$10 or greater **and** you or your Partnership had a California address as of 12/31, Schwab will report this information to the California Franchise Tax Board each tax year, per state statute. (1223-3LZ0)

## Positions - Summary

Beginning Value as of 12/01	Transfer of Securities(In/Out)	Dividends Reinvested	Cash Activity	Change in Market Value	=	Ending Value as of 12/31	Cost Basis	Unrealized Gain/(Loss)
\$224,916.18	\$0.00	(\$926.82)	\$1,463.14	(\$7,740.91)	=	<b>\$217,711.59</b>	\$210,840.61	\$39.53

Values may not reflect all of your gains/losses; Schwab has provided accurate gain and loss information wherever possible for most investments. Cost basis may be incomplete or unavailable for some of your holdings and may change or be adjusted in certain cases. Statement information should not be used for tax preparation, instead refer to official tax documents. For additional information refer to Terms and Conditions.

## Cash and Cash Investments

Type	Symbol	Description	Quantity	Price(\$)	Beginning Balance(\$)	Ending Balance(\$)	Change in Period Balance(\$)	Pending/Unsettled Cash(\$)	Interest/ Yield Rate	% of Acct
Bank Sweep		CHARLES SCHWAB BANK <sup>X,Z</sup>			6,559.43	6,831.45	272.02		0.05%	3%
<b>Total Cash and Cash Investments</b>					<b>\$6,559.43</b>	<b>\$6,831.45</b>	<b>\$272.02</b>			<b>3%</b>

## Positions - Mutual Funds

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	% of Acct	
NTBIX	NAVIGATOR TACTICAL FIXED <sup>◊</sup> INCOME I	4,471.9980	9.86000	44,093.90	43,546.30	547.60	20%	
<b>Total Mutual Funds</b>					<b>\$44,093.90</b>	<b>\$43,546.30</b>	<b>\$547.60</b>	<b>20%</b>

## Positions - Exchange Traded Funds

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Annual Income(\$)	% of Acct
IBUY	AMPLIFY ONLINE RETAIL	113.0000	64.65000	7,305.45	7,811.58	(506.13)	N/A	N/A
ARKK	ARK INNOVATION ETF	199.0000	56.77000	11,297.23	11,339.00	(41.77)	N/A	5%



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## Positions - Exchange Traded Funds (continued)

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Yield	Est. Annual Income(\$)	% of Acct
SKYY	FIRST TRUST CLOUD	138.0000	119.12000	16,438.56	14,826.66	1,611.90	N/A	N/A	8%
FDN	FIRST TRUST INTERNET	21.0000	243.17000	5,106.57	5,243.48	(136.91)	N/A	N/A	2%
SPMO	INVSC S P 500 MOMENTUM	99.0000	95.01000	9,405.99	9,044.62	361.37	0.81%	76.31	4%
IVV	ISHARES CORE S&P 500	18.0000	588.68000	10,596.24	10,689.97	(93.73)	1.45%	153.66	5%
IGV	ISHARES EXPANDED TCH STW	111.0000	100.12000	11,113.32	11,559.25	(445.93)	N/A	N/A	5%
AAXJ	ISHARES MSCI ALL COUNT	92.0000	72.18000	6,640.56	7,026.03	(385.47)	2.97%	197.58	3%
IWY	ISHARES RUSSELL TOP 200	55.0000	235.27000	12,939.85	13,455.69	(515.84)	0.42%	54.91	6%
IAI	ISHRS US BRKR DEALRS	40.0000	144.10000	5,764.00	5,373.39	390.61	1.2%	69.43	3%
SPYG	SPDR S&P 500 GROWTH ETF	288.0000	87.90000	25,315.20	24,807.24	507.96	0.77%	197.40	12%
VCR	VANGUARD CONSUMER	22.0000	375.38000	8,258.36	8,802.47	(544.11)	0.7%	58.06	4%
VFH	VANGUARD FINANCIALS ETF	73.0000	118.07000	8,619.11	7,787.93	831.18	2.22%	191.81	4%
VWO	VANGUARD FTSE EMERGING	235.0000	44.04000	10,349.40	11,606.44	(1,257.04)	9.67%	1,001.66	5%
DBEF	XTRACKERS MSCI EAFE HDGD	426.0000	41.40000	17,636.40	17,920.56	(284.16)	1.43%	253.10	8%
<b>Total Exchange Traded Funds</b>				<b>\$166,786.24</b>	<b>\$167,294.31</b>	<b>(\$508.07)</b>		<b>\$2,253.92</b>	<b>77%</b>

Estimated Annual Income ("EAI") and Estimated Yield ("EY") calculations are for informational purposes only. The actual income and yield might be lower or higher than the estimated amounts. EY is based upon EAI and the current price of the security and will fluctuate. For certain types of securities, the calculations could include a return of principal or capital gains in which case EAI and EY would be overstated. EY and EAI are not promptly updated to reflect when an issuer has missed a regular payment or announced changes to future payments, in which case EAI and EY will continue to display at a prior rate.

## Transactions - Summary

Beginning Cash* as of 12/01	+	Deposits	+	Withdrawals	+	Purchases	+	Sales/Redemptions	+	Dividends/Interest	+	Expenses	=	Ending Cash* as of 12/31
\$6,559.43		\$0.00		\$0.00		(\$63,680.07)		\$62,488.95		\$1,606.02		(\$142.88)		\$6,831.45

Other Activity **\$0.00**

Other activity includes transactions which don't affect the cash balance such as stock transfers, splits, etc.

\*Cash (includes any cash debit balance) held in your account plus the value of any cash invested in a sweep money fund.



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## Transaction Details

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share(\$)	Charges/ Interest(\$)	Amount(\$)	Realized Gain/(Loss)(\$)
12/05	Expense	Advisor Fee *		TO ADVISOR				(142.88)	
12/11	Sale		SPMO	INVSC S P 500 MOMENTUM ETF Exchange Processing Fee \$0.24	(86.0000)	96.5977	0.24	8,307.16	246.07 <sup>(ST)</sup>
	Sale		VIS	VANGUARD INDUSTRIALS ETF Exchange Processing Fee \$0.15	(20.0000)	270.3009	0.15	5,405.87	78.47 <sup>(ST)</sup>
	Purchase		IBUY	AMPLIFY ONLINE RETAIL ETF	113.0000	69.1290		(7,811.58)	
	Purchase		SPYG	SPDR S&P 500 GROWTH ETF	63.0000	89.5178		(5,639.62)	
12/16	Interest	Bank Interest <sup>X,Z</sup>		BANK INT 111624-121524				0.54	
12/17	Sale		IPKW	INVSC INTL BUYBACK ACHIEV ETF Exchange Processing Fee \$0.29	(224.0000)	40.8200	0.29	9,143.39	102.75 <sup>(ST)</sup>
	Sale		MDYV	SPDR S&P 400 MID CAP VALUE ETF Exchange Processing Fee \$0.32	(130.0000)	84.1501	0.32	10,939.19	(425.84) <sup>(ST)</sup>
	Sale		VFH	VANGUARD FINANCIALS ETF Exchange Processing Fee \$0.40	(112.0000)	122.0500	0.40	13,669.20	1,554.25 <sup>(ST)</sup>
	Purchase		IWY	ISHARES RUSSELL TOP 200 GROWTH ETF	55.0000	244.6489		(13,455.69)	
	Purchase		VCR	VANGUARD CONSUMER DISCRETIONARY ETF	22.0000	400.1122		(8,802.47)	
	Purchase		DBEF	XTRACKERS MSCI EAFE HDGD EQY ETF	263.0000	42.2450		(11,110.44)	
12/20	Purchase	Reinvested Shares	NTBIX	NAVIGATOR TACTICAL FIXED INCOME I	93.9980	9.8600		(926.82)	
	Dividend	Cash Dividend	AAXJ	ISHARES MSCI ALL COUNT				98.79	
	Dividend	Cash Dividend	IWY	ISHARES RUSSELL TOP 200				13.73	
	Dividend	Cash Dividend	IAI	ISHRS US BRKR DEALRS				17.36	
	Dividend	Div For Reinvest	NTBIX	NAVIGATOR TACTICAL FIXED				926.82	
	Dividend	Cash Dividend	VCR	VANGUARD CONSUMER				14.52	
	Dividend	Cash Dividend	VFH	VANGUARD FINANCIALS ETF				47.95	



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## Transaction Details (continued)

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share(\$)	Charges/ Interest(\$)	Amount(\$)	Realized Gain/(Loss)(\$)
12/24	Sale		KBE	SPDR S&P BANK ETF IV Exchange Processing Fee \$0.14	(85.0000)	55.4301	0.14	4,711.42	222.60 <sup>(ST)</sup>
	Purchase		FDN	FIRST TRUST INTERNET INDEX CF ETF	21.0000	249.6893		(5,243.48)	
	Dividend	Cash Dividend	VWO	VANGUARD FTSE EMERGING				250.42	
12/26	Dividend	Cash Dividend	KBE	SPDR S&P BANK ETF IV				28.76	
	Dividend	Cash Dividend	SPYG	SPDR S&P 500 GROWTH ETF				49.35	
12/27	Dividend	Cash Dividend	XMMO	INVESCO S & P MIDCAP				12.15	
	Dividend	Cash Dividend	SPMO	INVSC S P 500 MOMENTUM				19.08	
12/30	Dividend	Cash Dividend	DBEF	XTRACKERS MSCI EAFE HDGD				126.55	
12/31	Sale		XMMO	INVESCO S & P MIDCAP MOMENTUM ETF Exchange Processing Fee \$0.30	(83.0000)	124.2532	0.30	10,312.72	(1,048.35) <sup>(ST)</sup>
	Purchase		IVV	ISHARES CORE S&P 500 ETF IV	18.0000	593.8870		(10,689.97)	
<b>Total Transactions</b>								<b>\$272.02</b>	<b>\$729.95</b>

Date column represents the Settlement/Process date for each transaction.

## Bank Sweep Activity

Date	Description	Amount	Date	Description	Amount
12/01	<b>Beginning Balance <sup>x,z</sup></b>	<b>\$6,559.43</b>	12/26	BANK CREDIT FROM BROKERAGE <sup>x</sup>	328.53
12/06	BANK TRANSFER TO BROKERAGE	(142.88)	12/27	BANK CREDIT FROM BROKERAGE <sup>x</sup>	31.23
12/11	BANK CREDIT FROM BROKERAGE <sup>x</sup>	261.83	12/30	BANK CREDIT FROM BROKERAGE <sup>x</sup>	126.55
12/15	BANK INTEREST - CHARLES SCHWAB BANK <sup>x,z</sup>	0.54	12/31	BANK TRANSFER TO BROKERAGE	(377.25)
12/17	BANK CREDIT FROM BROKERAGE <sup>x</sup>	383.18	12/31	<b>Ending Balance <sup>x,z</sup></b>	<b>\$6,831.45</b>
12/20	BANK CREDIT FROM BROKERAGE <sup>x</sup>	192.35	12/31	Interest Rate <sup>*z</sup>	0.05%
12/24	BANK TRANSFER TO BROKERAGE	(532.06)			

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## Bank Sweep Activity (continued)

Date Description

Amount

Date Description

Amount

\* Your interest period was 11/16/24 - 12/15/24. <sup>z</sup>

## Endnotes For Your Account

- ◊ Dividends paid on this security will be automatically reinvested.
- \* You authorize Schwab to debit your account to pay investment management fees per the authorization you granted in your Account Application. Schwab does not review or monitor these fee payments. Contact your Investment Manager if you have questions.
- X Bank Sweep deposits are held at FDIC-insured Program Banks, which are listed in the Cash Features Disclosure Statement.

- Z For the Bank Sweep and Bank Sweep for Benefit Plans features, interest is paid for a period that differs from the Statement Period. Balances include interest paid as indicated on your statement by Schwab or one or more of its Program Banks. These balances do not include interest that may have accrued during the Statement Period after interest is paid. The interest paid may include interest that accrued in the prior Statement Period.

## Terms and Conditions

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**Accrued Income:** Accrued Income is the sum of the total accrued interest and/or accrued dividends on positions held in your Account, but the interest and/or dividends have not been received into your Account. Schwab makes no representation that the amounts shown (or any other amount) will be received. Accrued amounts are not covered by SIPC account protection until actually received and held in the Account. **AIP (Automatic Investment Plan) Customers:** Schwab receives remuneration in connection with certain transactions effected through Schwab. If you participate in a systematic investment program through Schwab, the additional information normally detailed on a trade confirmation will be provided upon request.

**Average Daily Balance:** Average daily composite of all cash balances that earn interest and all loans from Schwab that are charged interest. **Bank Sweep and Bank Sweep for Benefit Plans Features:** Schwab acts as your agent and custodian in establishing and maintaining your Deposit Account(s) as a feature of your brokerage Account(s). Deposit accounts held through these bank sweep features constitute direct obligations of one or more FDIC insured banks ("Program Banks") that are not obligations of Schwab. Funds swept to Program Banks are eligible for deposit insurance from the FDIC up to the applicable limits for each bank for funds held in the same insurable capacity. The balance in the Deposit Accounts can be withdrawn on your order and the proceeds returned to your brokerage Account or remitted to you as provided in your Account Agreement. For information on FDIC insurance and its limits, as well as other important disclosures about the bank sweep feature(s) in your Account(s), please refer to the Cash Features Disclosure Statement available online or from a Schwab representative. **Cash:** Any Free Credit Balance owed by us to you payable upon demand which, although accounted for on our books of record, is not segregated and may be used in the conduct of this firm's business. **Dividend Reinvestment Customers:** Dividend reinvestment transactions were effected by Schwab acting as a principal for its own account, except for the reinvestment of Schwab dividends, for which an independent broker-dealer acted as the buying agent. Further information on these transactions will be furnished upon written request. **Gain (or Loss):** Unrealized Gain or (Loss) and Realized Gain or (Loss) sections ("Gain/Loss Section(s)") contain a gain or a loss summary of your Account. This information has been provided on this statement at the request of your Advisor, if applicable. This information is not a solicitation or a recommendation to buy or sell. **Schwab does not provide tax advice and encourages you to consult with your tax**

**professional. Please view the Cost Basis Disclosure Statement for additional information on how gain (or loss) is calculated and how Schwab reports adjusted cost basis information to the IRS.**

**Interest:** For the Schwab One Interest, Bank Sweep, and Bank Sweep for Benefit Plans features, interest is paid for a period that may differ from the Statement Period. Balances include interest paid as indicated on your statement by Schwab or one or more of its Program Banks. These balances do not include interest that may have accrued during the Statement Period after interest is paid. The interest paid may include interest that accrued in the prior Statement Period. For the Schwab One Interest feature, interest accrues daily from the second-to-last business day of the prior month and is posted on the second-to-last business day of the current month. For the Bank Sweep and Bank Sweep for Benefit Plans features, interest accrues daily from the 16th day of the prior month and is credited/posted on the first business day after the 15th of the current month. If, on any given day, the interest that Schwab calculates for the Free Credit Balances in the Schwab One Interest feature in your brokerage Account is less than \$.005, you will not accrue any interest on that day. For balances held at banks affiliated with Schwab in the Bank Sweep and Bank Sweep for Benefit Plans features, interest will accrue even if the amount is less than \$.005. **Margin Account Customers:** This is a combined statement of your margin account and special memorandum account maintained for you under Section 220.5 of Regulation T issued by the Board of Governors of the Federal Reserve System. The permanent record of the separate account as required by Regulation T is available for your inspection. Securities purchased on margin are Schwab's collateral for the loan to you. It is important that you fully understand the risks involved in trading securities on margin. These risks include: 1) You can lose more funds than you deposit in the margin account; 2) Schwab can force the sale of securities or other assets in any of your account(s) to maintain the required account equity without contacting you; 3) You are not entitled to choose which assets are liquidated nor are you entitled to an extension of time on a margin call; 4) Schwab can increase its "house" maintenance margin requirements at any time without advance written notice to you. **Market Price:** The most recent price evaluation available to Schwab on the last business day of the report period, normally the last trade price or bid as of market close. Unpriced securities denote that no market evaluation update is currently available. Price evaluations are obtained from outside parties. Schwab shall have no responsibility for the accuracy or timeliness of any such valuations. Assets Not Held at Schwab are not held in your Account or covered by the Account's SIPC account protection and are not otherwise in Schwab's custody and are being provided as a courtesy to you. Information on Assets Not Held at Schwab, including but not limited to valuations, is reported solely based on information you provide to Schwab. Schwab can neither validate nor certify the existence of Assets Not Held at Schwab or the accuracy, completeness or timeliness of the information about Assets Not Held at Schwab, whether

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## Terms and Conditions (continued)

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**Market Value:** The Market Value is computed by multiplying the Market Price by the Quantity of Shares. This is the dollar value of your present holdings in your specified Schwab Account or a summary of the Market Value summed over multiple accounts. **Non-Publicly Traded Securities:** All assets shown on this statement, other than certain direct investments which may be held by a third party, are held in your Account. Values of certain Non-Publicly Traded Securities may be furnished by a third party as provided by Schwab's Account Agreement. Schwab shall have no responsibility for the accuracy or timeliness of such valuations. The Securities Investor Protection Corporation (SIPC) does not cover many limited partnership interests.

**Schwab Sweep Money Funds:** Includes the primary money market funds into which Free Credit Balances may be automatically invested pursuant to your Account Agreement. Schwab or an affiliate acts and receives compensation as the Investment Advisor, Shareholder Service Agent and Distributor for the Schwab Sweep Money Funds. The amount of such compensation is disclosed in the prospectus. The yield information for Schwab Sweep Money Funds is the current 7-day yield as of the statement period. Yields vary. If on any given day, the accrued daily dividend for your selected sweep money fund as calculated for your account is less than 1/2 of 1 cent (\$0.005), your account will not earn a dividend for that day. In addition, if you do not accrue at least 1 daily dividend of \$0.01 during a pay period, you will not receive a money market dividend for that period. Schwab and the Schwab Sweep Money Funds investment advisor may be voluntarily reducing a portion of a Schwab Sweep Money Fund's expenses. Without these reductions, yields would have been lower. **Securities Products and Services:** Securities products and services are offered by Charles Schwab & Co., Inc., Member SIPC. **Securities products and services, including unswept intraday funds and net credit balances held in brokerage accounts are not deposits or other obligations of, or guaranteed by, any bank, are not FDIC insured, and are subject to investment risk and may lose**

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## Schwab One® Account of

THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CLERKS  
ENVESTNET APM SRI

Account Number  
5054-7566

Statement Period  
December 1-31, 2024

## Account Summary

Ending Account Value as of 12/31

**\$143,266.21**

Beginning Account Value as of 12/01

**\$144,139.77**



Jan'24 Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

This Statement YTD

Beginning Value	<b>\$144,139.77</b>	\$55,072.68
Deposits	<b>0.00</b>	60,000.00
Withdrawals	<b>0.00</b>	0.00
Dividends and Interest	<b>862.34</b>	2,782.30
Transfer of Securities	<b>0.00</b>	0.00
Market Appreciation/(Depreciation)	<b>(1,644.34)</b>	26,727.57
Expenses	<b>(91.56)</b>	(1,316.34)
<b>Ending Value</b>	<b>\$143,266.21</b>	<b>\$143,266.21</b>

Account Ending Value reflects the market value of your cash and investments. It does not include pending transactions, unpriced securities or assets held outside Schwab's custody.

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8331 UTICA AVE STE 200  
RANCHO CUCAMONGA CA 91730-7600

## Your Independent Investment Manager and/or Advisor

URBAN WEALTH MGMT GROUP LLC  
841 APOLLO ST STE 320  
EL SEGUNDO CA 90245-4819  
1 (424) 277-2260

The custodian of your brokerage account is:  
Charles Schwab & Co., Inc. Member SIPC. Your  
independent Investment Advisor is not affiliated  
with or an agent of Schwab and Schwab does not  
supervise or endorse your Advisor.

## Managed Account Details

**Money Manager**  
Envestnet Asset Management Inc  
**Investment Strategy**  
Envestnet Unified Managed Account

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12/31-83153-AC1093301-160932 \*3 #1-2-3



## Schwab One® Account of

THE INTERNATIONAL INSTITUTE OF  
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ENVESTNET APM SRI

### Asset Allocation



This Period      Current Allocation

Cash and Cash Investments	3,534.05	2%
Equities	71,051.40	50%
Mutual Funds	23,061.13	16%
Exchange Traded Funds	45,619.63	32%
<b>Total</b>	<b>\$143,266.21</b>	<b>100%</b>

Statement Period  
December 1-31, 2024

### Income Summary

Federal Tax Status	This Period		YTD	
	Tax-Exempt	Taxable	Tax-Exempt	Taxable
Schwab One® Interest	0.00	0.22	0.00	11.30
Cash Dividends	0.00	862.12	0.00	2,771.00
<b>Total Income</b>	<b>\$0.00</b>	<b>\$862.34</b>	<b>\$0.00</b>	<b>\$2,782.30</b>

### Top Account Holdings This Period

SYMBOL CUSIP	Description	Market Value	% of Accounts
PCEIX	PIMCO CLIMATE BOND INSTIT...	14,348.87	10%
SUSB	ISHARES ESG AWR 1-5 Y	11,386.70	8%
NVDA	NVIDIA CORP	11,146.07	8%
NUDM	NUVEEN ESG INTER DVLP	10,911.78	8%
NDAQ	NASDAQ INC	10,823.40	8%

### Gain or (Loss) Summary

	Short-Term (ST)			Long-Term (LT)		
	Gain	(Loss)	Net	Gain	(Loss)	Net
This Period	0.00	0.00	0.00	0.00	0.00	0.00
YTD	5,610.82	0.00	5,610.82	6,600.05	0.00	6,600.05
<b>Unrealized</b>	<b>\$19,361.30</b>					

Values may not reflect all of your gains/losses and may be rounded up to the nearest dollar; Schwab has provided accurate gain and loss information wherever possible for most investments. Cost basis may be incomplete or unavailable for some of your holdings and may change or be adjusted in certain cases. Please login to your account at Schwab.com for real-time gain/loss information. Statement information should not be used for tax preparation, instead refer to official tax documents. For additional information refer to Terms and Conditions.



## Schwab One® Account of

THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CLERKS  
ENVESTNET APM SRI

Statement Period

December 1-31, 2024

### A Message About Your Account

#### CALIFORNIA RESIDENTS

If your total payments of interest and interest dividends on federally tax-exempt non-California municipal bonds were \$10 or greater **and** you or your Partnership had a California address as of 12/31, Schwab will report this information to the California Franchise Tax Board each tax year, per state statute. (1223-3LZ0)

### Positions - Summary

Beginning Value as of 12/01	+	Transfer of Securities(In/Out)	+	Dividends Reinvested	+	Cash Activity	+	Change in Market Value	=	Ending Value as of 12/31	Cost Basis	Unrealized Gain/(Loss)
\$144,139.77		\$0.00		(\$248.15)		\$770.78		(\$1,396.19)		\$143,266.21	\$120,370.86	\$19,361.30

Values may not reflect all of your gains/losses; Schwab has provided accurate gain and loss information wherever possible for most investments. Cost basis may be incomplete or unavailable for some of your holdings and may change or be adjusted in certain cases. Statement information should not be used for tax preparation, instead refer to official tax documents. For additional information refer to Terms and Conditions.

### Cash and Cash Investments

Type	Symbol	Description	Quantity	Price(\$)	Beginning Balance(\$)	Ending Balance(\$)	Change in Period Balance(\$)	Pending/Unsettled Cash(\$)	Interest/ Yield Rate	% of Acct
Cash					3,011.42	3,534.05	522.63	(364.62)		2%
<b>Total Cash and Cash Investments</b>					<b>\$3,011.42</b>	<b>\$3,534.05</b>	<b>\$522.63</b>			<b>2%</b>

### Positions - Equities

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Yield	Est. Annual Income(\$)	% of Acct
GOOGL	ALPHABET INC	43.0000	189.30000	8,139.90	5,939.15	2,200.75	0.42%	34.40	6%
AMZN	AMAZON.COM INC	36.0000	219.39000	7,898.04	5,537.45	2,360.59	N/A	0.00	6%
AAPL	APPLE INC	43.0000	250.42000	10,768.06	7,866.83	2,901.23	0.39%	43.00	8%
GS	GOLDMAN SACHS GROUP INC	14.0000	572.62000	8,016.68	8,463.56	(446.88)	0.09%	168.00	6%
MSFT	MICROSOFT CORP	14.0000	421.50000	5,901.00	5,056.68	844.32	0.78%	46.48	4%
NDAQ	NASDAQ INC	140.0000	77.31000	10,823.40	9,752.51	1,070.89	1.24%	134.40	8%
NVDA	NVIDIA CORP	83.0000	134.29000	11,146.07	4,114.61	7,031.46	0.02%	3.32	8%



Schwab One® Account of

THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CLERKS  
ENVESTNET APM SRI

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## Positions - Equities (continued)

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Yield	Est. Annual Income(\$)	% of Acct
CRM	SALESFORCE INC	25.0000	334.33000	8,358.25	5,941.61	2,416.64	0.47%	40.00	6%
<b>Total Equities</b>				<b>\$71,051.40</b>	<b>\$52,672.40</b>	<b>\$18,379.00</b>		<b>\$469.60</b>	<b>50%</b>

## Positions - Mutual Funds

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	% of Acct
AGEYX	AMERICAN BEACON DEVELOPI <sup>◊</sup> NGWLDINCFD-YCL	1,235.7810	7.05000	8,712.26	8,590.11	122.15	6%
PCEIX	PIMCO CLIMATE BOND INSTI <sup>◊</sup> TUTIONAL	1,626.8560	8.82000	14,348.87	14,176.64	172.23	10%
<b>Total Mutual Funds</b>				<b>\$23,061.13</b>	<b>\$22,766.75</b>	<b>\$294.38</b>	<b>16%</b>

## Positions - Exchange Traded Funds

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Yield	Est. Annual Income(\$)	% of Acct
SUSB	ISHARES ESG AWR 1-5 Y	461.0000	24.70000	11,386.70	11,220.94	165.76	4.37%	497.91	8%
IFRA	ISHARES US	166.0000	46.29000	7,684.14	6,729.61	954.53	1.96%	151.00	5%
IYW	ISHARES US TECHNOLOGY	54.0000	159.52000	8,614.08	8,575.71	38.37	0.16%	14.27	6%
NUDM	NUVEEN ESG INTER DVLP	363.0000	30.06000	10,911.78	10,690.40	221.38	3.32%	363.15	8%
SMH	VANECK SEMICONDUCTOR	29.0000	242.17000	7,022.93	7,715.05	(692.12)	0.44%	31.07	5%
<b>Total Exchange Traded Funds</b>				<b>\$45,619.63</b>	<b>\$44,931.71</b>	<b>\$687.92</b>		<b>\$1,057.40</b>	<b>32%</b>

Estimated Annual Income ("EAI") and Estimated Yield ("EY") calculations are for informational purposes only. The actual income and yield might be lower or higher than the estimated amounts. EY is based upon EAI and the current price of the security and will fluctuate. For certain types of securities, the calculations could include a return of principal or capital gains in which case EAI and EY would be overstated. EY and EAI are not promptly updated to reflect when an issuer has missed a regular payment or announced changes to future payments, in which case EAI and EY will continue to display at a prior rate.



## Schwab One® Account of

THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CLERKS  
ENVESTNET APM SRI

Statement Period

December 1-31, 2024

## Transactions - Summary

Beginning Cash* as of 12/01	+	Deposits	+	Withdrawals	+	Purchases	+	Sales/Redemptions	+	Dividends/Interest	+	Expenses	= Ending Cash* as of 12/31
<b>\$3,011.42</b>		<b>\$0.00</b>		<b>\$0.00</b>		<b>(\$248.15)</b>		<b>\$0.00</b>		<b>\$862.34</b>		<b>(\$91.56)</b>	<b>\$3,534.05</b>

Other Activity **\$0.00**

Other activity includes transactions which don't affect the cash balance such as stock transfers, splits, etc.

\*Cash (includes any cash debit balance) held in your account plus the value of any cash invested in a sweep money fund.

## Transaction Details

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share(\$)	Charges/ Interest(\$)	Amount(\$)	Realized Gain/(Loss)(\$)
12/02	Purchase	Reinvested Shares	AGEYX	AMERICAN BEACON DEVELOPINGWLDINCFD-YCL	10.8080	7.0800		(76.52)	
	Dividend	Div For Reinvest	AGEYX	AMERICAN BEACON DEVELOPINGWLDINCFD-YCL				76.52	
12/05	Dividend	Cash Dividend	SUSB	ISHARES ESG AWR 1-5 Y				38.63	
	Expense	Advisor Fee *		TO ADVISOR				(91.56)	
12/12	Dividend	Qual. Dividend	MSFT	MICROSOFT CORP				13.28	
12/16	Dividend	Qual. Dividend	GOOGL	ALPHABET INC				8.60	
12/19	Dividend	Cash Dividend	NUDM	NUVEEN ESG INTER DVLP				363.15	
12/20	Dividend	Cash Dividend	IFRA	ISHARES US				37.75	
	Dividend	Cash Dividend	IYW	ISHARES US TECHNOLOGY				3.57	
	Dividend	Qual. Dividend	NDAQ	NASDAQ INC				33.60	
12/23	Dividend	Cash Dividend	SUSB	ISHARES ESG AWR 1-5 Y				41.49	
12/24	Dividend	Cash Dividend	SMH	VANECK SEMICONDUCTOR				31.07	
12/26	Purchase	Reinvested Shares	PCEIX	PIMCO CLIMATE BOND INSTITUTIONAL	3.2080	8.8100		(28.26)	
	Dividend	Div For Reinvest	PCEIX	PIMCO CLIMATE BOND INSTITUTIONAL				28.26	
12/27	Dividend	Qual. Dividend	NVDA	NVIDIA CORP				0.83	
12/30	Interest	Credit Interest		SCHWAB1 INT 11/27-12/29				0.22	



## Schwab One® Account of

THE INTERNATIONAL INSTITUTE OF  
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ENVESTNET APM SRI

Statement Period

December 1-31, 2024

### Transaction Details (continued)

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share(\$)	Charges/ Interest(\$)	Amount(\$)	Realized Gain/(Loss)(\$)
12/30	Dividend	Qual. Dividend	GS	GOLDMAN SACHS GROUP INC				42.00	
12/31	Purchase	Reinvested Shares	AGEYX	AMERICAN BEACON DEVELOPI NGWLDINCFD-YCL	14.1740	7.0500		(99.93)	
	Purchase	Reinvested Shares	PCEIX	PIMCO CLIMATE BOND INSTI TUTIONAL	4.9250	8.8200		(43.44)	
	Dividend	Div For Reinvest	AGEYX	AMERICAN BEACON DEVELOPI				99.93	
	Dividend	Div For Reinvest	PCEIX	PIMCO CLIMATE BOND INSTI				43.44	
<b>Total Transactions</b>								<b>\$522.63</b>	<b>\$0.00</b>

Date column represents the Settlement/Process date for each transaction.

11/27 through 12/29: \$0.22 based on .099% average Schwab One® interest rate paid on 22 days in which your account had an average daily balance of \$2,983.24.

### Pending / Open Activity

Activity Type	Date	Action	Symbol/ CUSIP	Description	Quantity	Market Price/ Rate per Share(\$)	Limit Price(\$)	Settle/ Payable Date	Expiration Date	Amount(\$)
Pending	12/18	Qual Div	CRM	SALESFORCE INC	25.0000	0.4000		01/09		10.00
	12/31	Sale	GOOGL	ALPHABET INC	5.0000	191.3550		01/02		956.75
		Sale	AMZN	AMAZON.COM INC	3.0000	221.5000		01/02		664.48
		Sale	AAPL	APPLE INC	9.0000	251.9450		01/02		2,267.45
		Purchase	COST	COSTCO WHSL CORP NEW	9.0000	917.6400		01/02		(8,258.76)
		Purchase	GS	GOLDMAN SACHS GROUP INC	1.0000	573.6135		01/02		(573.61)
		Purchase	SUSB	ISHARES ESG AWR 1-5 Y	5.0000	24.7177		01/02		(123.59)
		Sale	IFRA	ISHARES US	42.0000	46.3252		01/02		1,945.60
		Sale	IYW	ISHARES US TECHNOLOGY	9.0000	160.7550		01/02		1,446.76
		Purchase	NDAQ	NASDAQ INC	9.0000	77.4550		01/02		(697.10)
		Purchase	NUDM	NUVEEN ESG INTER DVLP	19.0000	30.1987		01/02		(573.78)
		Sale	NVDA	NVIDIA CORP	9.0000	136.7250		01/02		1,230.50
		Sale	CRM	SALESFORCE INC	4.0000	335.1800		01/02		1,340.68
<b>Total Pending Transactions</b>										<b>(\$364.62)</b>

## Endnotes For Your Account

◊ Dividends paid on this security will be automatically reinvested.

## Terms and Conditions

**GENERAL INFORMATION AND KEY TERMS:** This Account statement is furnished solely by Charles Schwab & Co., Inc. ("Schwab") for your Account at Schwab ("Account"). Unless otherwise defined herein, capitalized terms have the same meanings as in your Account Agreement. If you receive any other communication from any source other than Schwab which purports to represent your holdings at Schwab (including balances held at a Depository Institution) you should verify its content with this statement.

**Accrued Income:** Accrued Income is the sum of the total accrued interest and/or accrued dividends on positions held in your Account, but the interest and/or dividends have not been received into your Account. Schwab makes no representation that the amounts shown (or any other amount) will be received. Accrued amounts are not covered by SIPC account protection until actually received and held in the Account. **AIP (Automatic Investment Plan) Customers:** Schwab receives remuneration in connection with certain transactions effected through Schwab. If you participate in a systematic investment program through Schwab, the additional information normally detailed on a trade confirmation will be provided upon request.

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**Interest:** For the Schwab One Interest, Bank Sweep, and Bank Sweep for Benefit Plans features, interest is paid for a period that may differ from the Statement Period. Balances include interest paid as indicated on your statement by Schwab or one or more of its Program Banks. These balances do not include interest that may have accrued during the Statement Period after interest is paid. The interest paid may include interest that accrued in the prior Statement Period. For the Schwab One Interest feature, interest accrues daily from the second-to-last business day of the prior month and is posted on the second-to-last business day of the current month. For the Bank Sweep and Bank Sweep for Benefit Plans features, interest accrues daily from the 16th day of the prior month and is credited/posted on the first business day after the 15th of the current

\* You authorize Schwab to debit your account to pay investment management fees per the authorization you granted in your Account Application. Schwab does not review or monitor these fee payments. Contact your Investment Manager if you have questions.

month. If, on any given day, the interest that Schwab calculates for the Free Credit Balances in the Schwab One Interest feature in your brokerage Account is less than \$.005, you will not accrue any interest on that day. For balances held at banks affiliated with Schwab in the Bank Sweep and Bank Sweep for Benefit Plans features, interest will accrue even if the amount is less than \$.005. **Margin Account Customers:** This is a combined statement of your margin account and special memorandum account maintained for you under Section 220.5 of Regulation T issued by the Board of Governors of the Federal Reserve System. The permanent record of the separate account as required by Regulation T is available for your inspection. Securities purchased on margin are Schwab's collateral for the loan to you. It is important that you fully understand the risks involved in trading securities on margin. These risks include: 1) You can lose more funds than you deposit in the margin account; 2) Schwab can force the sale of securities or other assets in any of your account(s) to maintain the required account equity without contacting you; 3) You are not entitled to choose which assets are liquidated nor are you entitled to an extension of time on a margin call; 4) Schwab can increase its "house" maintenance margin requirements at any time without advance written notice to you. **Market Price:** The most recent price evaluation available to Schwab on the last business day of the report period, normally the last trade price or bid as of market close. Unpriced securities denote that no market evaluation update is currently available. Price evaluations are obtained from outside parties. Schwab shall have no responsibility for the accuracy or timeliness of any such valuations. **Assets Not Held at Schwab:** Assets Not Held at Schwab are not held in your Account or covered by the Account's SIPC account protection and are not otherwise in Schwab's custody and are being provided as a courtesy to you. Information on Assets Not Held at Schwab, including but not limited to valuations, is reported solely based on information you provide to Schwab. Schwab can neither validate nor certify the existence of Assets Not Held at Schwab or the accuracy, completeness or timeliness of the information about Assets Not Held at Schwab, whether provided by you or otherwise. Descriptions of Assets Not Held at Schwab may be abbreviated or truncated. Some securities, especially thinly traded equities in the OTC market or foreign markets, may not report the most current price and are indicated as Stale Priced. Certain Limited Partnerships (direct participation programs) and unlisted Real Estate Investment Trust (REIT) securities, for which you may see a value on your monthly Account statement that reflects the issuer's appraised estimated value, are not listed on a national securities exchange, and are generally illiquid. Even if you are able to sell such securities, the price received may be less than the per share appraised estimated value provided in the account statement. **Market Value:** The Market Value is computed by multiplying the Market Price by the Quantity of Shares. This is the dollar value of your present holdings in your specified Schwab Account or a summary of the Market Value summed over multiple accounts. **Non-Publicly Traded Securities:** All assets shown on this statement, other than certain direct investments which may be held by a third party, are held in your Account. Values of certain Non-Publicly Traded Securities may be furnished by a third party as provided by Schwab's Account Agreement. Schwab shall have no responsibility for the accuracy or timeliness of such valuations. The Securities Investor Protection Corporation (SIPC) does not cover many limited partnership interests. **Schwab Sweep Money Funds:** Includes the primary money market funds into which Free Credit Balances may be automatically invested pursuant to your Account Agreement. Schwab or an affiliate acts and receives compensation as the Investment Advisor, Shareholder Service Agent and Distributor for the Schwab Sweep Money Funds. The amount of such compensation is disclosed in the prospectus. The yield information for Schwab Sweep Money Funds is the current 7-day yield as of the statement period. Yields vary. If on any given day, the accrued daily dividend for your selected sweep money fund as calculated for your account is

Statement Period

December 1-31, 2024

## Terms and Conditions (continued)

less than 1/2 of 1 cent (\$0.005), your account will not earn a dividend for that day. In addition, if you do not accrue at least 1 daily dividend of \$0.01 during a pay period, you will not receive a money market dividend for that period. Schwab and the Schwab Sweep Money Funds investment advisor may be voluntarily reducing a portion of a Schwab Sweep Money Fund's expenses. Without these reductions, yields would have been lower. **Securities Products and Services:** Securities products and services are offered by Charles Schwab & Co., Inc., Member SIPC. Securities products and services, including unswept intraday funds and net credit balances held in brokerage accounts are not deposits or other obligations of, or guaranteed by, any bank, are not FDIC insured, and are subject to investment risk and may lose value. SIPC does not cover balances held at Program Banks in the Bank Sweep and Bank Sweep for Benefit Plans features. Please see your Cash Feature Disclosure Statement for more information on insurance coverage. **Yield to Maturity:** This is the actual average annual return on a note if held to maturity. **IN CASE OF ERRORS OR DISCREPANCIES:** If you find an error or discrepancy relating to your brokerage activity (other than an electronic fund transfer) you must notify us promptly, but no later than 10 days after this statement is sent or made available to you. If this statement shows that we have mailed or delivered security certificate(s) that you have not received, notify Schwab immediately. You may call us at 800-435-4000. (Outside the U.S., call +1-415-667-8400.) If you're a client of an independent investment advisor, call us at 800-515-2157. Any oral communications should be re-confirmed in writing to further protect your rights, including rights under the

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**Securities Investor Protection Act (SIPA).** If you do not so notify us, you agree that the statement activity and Account balance are correct for all purposes with respect to those brokerage transactions. **IN CASE OF COMPLAINTS:** If you have a complaint regarding your Schwab statement, products or services, please write to Client Service & Support at Charles Schwab & Co., Inc., P.O. Box 982603 El Paso, TX 79998-2603, or call customer service at 800-435-4000. (Outside the U.S., call +1-415-667-8400.) If you're a client of an independent investment advisor, call us at 800-515-2157. **Address Changes:** If you fail to notify Schwab in writing of any change of address or phone number, you may not receive important notifications about your Account, and trading or other restrictions might be placed on your Account. **Additional Information:** We are required by law to report to the Internal Revenue Service adjusted cost basis information (if applicable), certain payments to you and credits to your Account during the calendar year. Retain this statement for income tax purposes. A financial statement for your inspection is available at Schwab's offices or a copy will be mailed to you upon written request. Any third-party trademarks appearing herein are the property of their respective owners. Charles Schwab & Co., Inc., Charles Schwab Bank, Charles Schwab Premier Bank, and Charles Schwab Trust Bank are separate but affiliated companies and subsidiaries of the Charles Schwab Corporation. © 2025 Charles Schwab & Co., Inc. ("Schwab"). All rights reserved. **Member SIPC.** (O1CUSTNC) (0822-20UL)



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

For the Year Ended December 31, 2024  
(Summarized Totals for 2023)

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

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## INDEPENDENT ACCOUNTANT'S COMPILATION REPORT

To the 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 organization), which comprise the statement of financial position as of December 31, 2024, 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' 2023 financial statements and issued a compilation report on those financial statements in our report dated April 29, 2024. The summarized comparative information presented herein as of and for the year ended December 31, 2023, is consistent, in all material respects, with the compiled financial statements from which it has been derived.

*GYL LLP*

GYL LLP  
Ontario, California  
April 24, 2025

### CPAs ■ Advisors

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

**STATEMENTS OF FINANCIAL POSITION**

December 31, 2024  
(Summarized Totals for 2023)

	<b>ASSETS</b>	
	2024	2023
<b>Current Assets</b>		
Cash and cash equivalents	\$ 1,772,151	\$ 2,063,704
Investments	1,008,547	738,472
Accounts receivable	49,847	37,011
Prepaid expenses	28,763	4,661
Conference prepaid expenses	66,313	47,343
<b>Total Current Assets</b>	<u>2,925,621</u>	<u>2,891,191</u>
<b>Property and Equipment, net</b>	<u>773,817</u>	<u>764,635</u>
<b>Total Assets</b>	<u><u>\$ 3,699,438</u></u>	<u><u>\$ 3,655,826</u></u>
<b>LIABILITIES AND NET ASSETS</b>		
<b>Current Liabilities</b>		
Accounts payable	\$ 103,846	\$ 87,971
Accrued liabilities	98,567	85,135
Deferred revenue	1,006,036	1,016,985
Tenant security deposits	6,150	6,150
Mortgage payable - current portion	16,117	15,564
<b>Total Current Liabilities</b>	<u>1,230,716</u>	<u>1,211,805</u>
<b>Long-Term Liabilities</b>		
Mortgage payable	<u>472,369</u>	<u>487,479</u>
<b>Total Liabilities</b>	<u><u>1,703,085</u></u>	<u><u>1,699,284</u></u>
<b>Net Assets</b>		
Without Donor Restrictions		
Undesignated	633,325	583,496
Investment in property and equipment, net of related debt	285,331	261,592
Board designated for operating reserve	1,077,697	1,111,454
<b>Total Net Assets Without Donor Restrictions</b>	<u>1,996,353</u>	<u>1,956,542</u>
<b>Total Liabilities and Net Assets</b>	<u><u>\$ 3,699,438</u></u>	<u><u>\$ 3,655,826</u></u>



See independent accountant's compilation  
report and accompanying notes.

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

**STATEMENTS OF ACTIVITIES**  
For the Year Ended December 31, 2024  
(Summarized Totals for 2023)

	Without Donor	With Donor	Total	
	Restrictions	Restrictions	2024	2023
<b>REVENUES</b>				
Membership dues	\$ 1,496,618	\$ -	\$ 1,496,618	\$ 1,439,367
Conference	566,778	-	566,778	547,505
Education	303,896	-	303,896	404,133
Marketing development and promotion	30,693	-	30,693	32,792
Building rental	65,987	-	65,987	63,162
Investment income	75,534	-	75,534	8,736
Interest income	37,217	-	37,217	46,777
<b>Total Revenues</b>	<b>2,576,723</b>	<b>-</b>	<b>2,576,723</b>	<b>2,542,472</b>
<b>EXPENSES</b>				
Program Services				
Education	386,915	-	386,915	456,161
Conference	670,355	-	670,355	689,328
Member services	337,938	-	337,938	292,973
Marketing development and promotion	165,778	-	165,778	151,681
Building	131,489	-	131,489	103,167
Supporting Services				
General and administration	844,437	-	844,437	796,964
<b>Total Expenses</b>	<b>2,536,912</b>	<b>-</b>	<b>2,536,912</b>	<b>2,490,274</b>
<b>Change in net assets</b>	<b>39,811</b>	<b>-</b>	<b>39,811</b>	<b>52,198</b>
<b>Net assets, beginning of year</b>	<b>1,956,542</b>	<b>-</b>	<b>1,956,542</b>	<b>1,904,344</b>
<b>Net assets, end of year</b>	<b>\$ 1,996,353</b>	<b>\$ -</b>	<b>\$ 1,996,353</b>	<b>\$ 1,956,542</b>



See independent accountant's compilation report and accompanying notes.

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

**STATEMENTS OF FUNCTIONAL EXPENSES**  
For the Year Ended December 31, 2024  
(Summarized Totals for 2023)

EXPENSES	Program Services					Supporting Services			Total	
	Education	Conference	Member Services	Marketing Development & Promotion		Building	General and Administration	2024	2023	
Salaries	\$ 232,306	\$ -	\$ 204,880	\$ 124,444	\$ 9,293	-	\$ 337,171	\$ 898,801	\$ 780,387	
Payroll taxes	19,402	-	17,609	-	-	24,021	70,325	62,788	62,788	
Employee benefits	37,122	-	34,742	18,548	-	45,573	135,985	121,964	121,964	
Consultant and contractor	-	78,234	-	-	-	95,355	173,589	182,489	182,489	
Outside services	-	-	-	-	12,261	-	12,261	12,261	31,801	
Accounting	-	-	-	-	-	12,675	12,675	12,200	12,200	
Dues and subscriptions	-	130	359	-	2,600	-	3,089	3,879	15,256	
Office expense	22,963	-	-	-	2,475	8,359	33,797	15,256	73,540	
Computer expense	-	18,279	-	-	-	72,247	90,626	51,052	51,052	
Bank and credit card fees	9,037	19,269	24,018	130	-	64,416	65	64,481	19,259	
Building maintenance	-	-	-	-	-	-	8,735	8,735	9,223	
Equipment rental	-	-	-	-	-	-	13,721	13,721	10,100	
Telephone	-	-	-	-	-	-	819	22,365	43,442	
Postage and shipping	4,508	6,298	10,740	-	-	-	-	8,447	7,087	
Publishing costs - News Digest	-	-	1,131	7,316	-	-	-	610	14,368	
Publishing costs - printing and media	-	13,392	-	3,666	-	-	-	40,088	20,310	
Certification	37,064	3,024	-	-	-	-	-	124,833	15,524	
Academy workshop expense	-	124,833	-	-	-	-	-	241,452	251,265	
Conference expenses	-	241,452	-	-	-	-	-	107,524	146,668	
Conference food and beverages	-	107,524	-	-	-	-	-	42,164	63,635	
Meetings	-	21,471	-	-	-	-	-	203,974	181,841	
Travel	1,661	44,844	3,916	-	-	152,653	7,612	7,400	112,966	
Insurance	-	-	-	-	4,448	3,164	-	-	-	
Mortgage interest	3,175	-	2,268	1,134	9,071	2,495	18,143	18,634	18,634	
Property tax	3,276	-	2,340	1,170	9,359	2,574	18,719	18,334	18,334	
Depreciation and amortization	6,482	-	4,630	2,315	18,520	5,093	37,040	35,621	35,621	
Utilities	2,919	-	2,085	1,042	8,339	2,293	16,678	16,570	16,570	
Member grants	7,000	-	-	-	-	-	7,000	8,000	8,000	
Membership drive	-	-	9,413	-	-	-	9,413	7,176	7,176	
Exhibit/sponsorship expenses	-	-	-	-	-	-	-	149	149	
Symposium costs	-	9,884	1,428	20	-	-	-	140,787	140,787	
Other	-	-	-	-	-	-	-	17,630	17,630	
<b>Total Expenses</b>	<b>\$ 386,915</b>	<b>\$ 670,355</b>	<b>\$ 337,938</b>	<b>\$ 165,778</b>	<b>\$ 131,489</b>	<b>\$ 844,437</b>	<b>\$ 2,536,912</b>	<b>\$ 2,490,274</b>		

See independent accountant's compilation report and accompanying notes.



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

**STATEMENTS OF CASH FLOWS**  
For the Year Ended December 31, 2024  
(Summarized Totals for 2023)

	<u>2024</u>	<u>2023</u>
<b>Cash Flows from Operating Activities</b>		
Change in net assets	\$ 39,811	\$ 52,198
Adjustments to reconcile change in net assets to net cash provided by (used in) operating activities:		
Depreciation	36,304	34,885
Amortization of loan costs	736	736
Realized and unrealized (gain) loss on investments	(30,712)	(8,736)
(Increase) decrease in operating assets:		
Accounts receivable	(12,836)	9,996
Prepaid expenses	(65,065)	170
Conference prepaid expenses	21,993	9,053
Increase (decrease) in operating liabilities:		
Accounts payable	15,875	37,588
Accrued liabilities	13,432	1,588
Deferred revenue	(10,949)	167,127
<b>Net Cash Provided By Operating Activities</b>	<u>8,589</u>	<u>304,605</u>
<b>Cash Flows from Investing Activities</b>		
Purchase of investments	(1,610,472)	(856,336)
Proceeds from sale of investments	1,371,109	126,600
Purchase of fixed assets	(45,486)	(58,779)
<b>Net Cash Used In Investing Activities</b>	<u>(284,849)</u>	<u>(788,515)</u>
<b>Cash Flows from Financing Activities</b>		
Principal payments on mortgage note	(15,293)	(14,801)
<b>Net Cash Used In Financing Activities</b>	<u>(15,293)</u>	<u>(14,801)</u>
Net increase (decrease) in cash and cash equivalents	(291,553)	(498,711)
Cash and cash equivalents, beginning of year	2,063,704	2,562,415
Cash and cash equivalents, end of year	<u>\$ 1,772,151</u>	<u>\$ 2,063,704</u>
Supplemental disclosures of cash flow information:		
Cash paid in 2024 and 2023 for interest expense is \$18,142 and \$18,634, respectively.		



See independent accountant's compilation report and accompanying notes.

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

**NOTES TO FINANCIAL STATEMENTS**  
December 31, 2024

**Note 1      Nature of Organization**

Nature of Organization – The International Institute of Municipal Clerks (the “Institute”), a not-for-profit corporation, is a professional association of city, town, township, village, borough and county clerks, secretaries and recorders from all U.S. states, Canadian provinces and fifteen other countries. Founded in 1947, the Institute has more than fifty years of experience improving the professionalism of municipal clerks. The Institute has more than 10,000 members representing towns, small municipalities and large urban jurisdictions of more than several million people.

**Note 2      Summary of Significant Accounting Policies**

Basis of Accounting – The Institute prepares its financial statements using the accrual basis of accounting generally accepted in the United States of America (“U.S. GAAP”).

Net Assets – Net assets, revenues, gains, and losses are classified based on the existence or absence of donor or grantor-imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

*Net Assets Without Donor Restrictions* – Net assets available for use in general operations and not subject to donor restrictions. The governing board has designated, from net assets without donor restrictions, net assets for an operating reserve.

*Net Assets With Donor Restrictions* – Net assets subject to donor (or certain grantor) imposed restrictions. Some donor-imposed restrictions are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates that resources be maintained in perpetuity. Donor-imposed restrictions are released when a restriction expires, that is, when the stipulated time has elapsed, when the stipulated purpose for which the resource was restricted has been fulfilled, or both.

Cash and Cash Equivalents – For purposes of the statement of cash flows, management considers all highly liquid investments with a maturity of three months or less to be cash equivalents. The original carrying value of cash and cash equivalents approximates fair value due to the short maturities of those financial instruments.

Accounts Receivable – Accounts receivables are stated at the amount management expects to collect from outstanding balances net of an allowance for credit losses. Balances that are still outstanding after management has used reasonable collection efforts are written off as bad debt expenses.



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

**NOTES TO FINANCIAL STATEMENTS**  
December 31, 2024

**Note 2**

**Summary of Significant Accounting Policies (continued)**

The Institute operates in the nonprofit industry and its account receivables are primarily derived from members. At each balance sheet date, the Institute evaluates any expected allowance for credit losses based on historical losses, current conditions and a reasonable and supportable forecast. This estimate is calculated on a pooled basis where similar risk characteristics exist. Account receivables are evaluated individually when they do not share similar risk characteristics which could exist in circumstances where amounts are considered at risk or uncollectable.

As of December 31, 2024, management evaluated no allowance for credit loss is expected.

The Institute writes off receivables when there is information that indicates the debtor is facing significant financial difficulty and there is no possibility of recovery.

Prepaid Expenses/ Conference Prepaid Expenses – Expense items of a nature which will benefit future periods are charged to deposits and prepaid accounts and are amortized over actual periods benefited.

Property and Equipment – Property and equipment are reported at cost or, if donated, at the approximate fair value at the date of donation. Donations are recorded as unrestricted support unless the donor has restricted the donated asset for a specific purpose. Depreciation is computed using the straight-line method over estimated useful lives. The Institute's policy is to capitalize asset purchases in excess of \$1,000.

Deferred Revenue – This amount represents funds received in excess of earned revenues. These funds are recognized as revenue in the applicable period of service.

Membership Dues and Conference Fees – Pursuant to Accounting Standards Codification (“ASC”) 606 the Institute recognizes revenue when members obtain control of promised services. The Institute records the amount of revenue that reflects the consideration that it expects to receive in exchange for those services. The two major sources of revenues are membership dues and annual conference fees. The Institute applies the following five-step model in order to determine this amount: (i) identification of the promised services in the contract; (ii) determination of whether the promised services are performance obligation, include whether they are distinct in the context of the contract; (iii) measurement of the transaction prices, including the constraint on variable consideration; (iv) allocation of the transaction prices to the performance obligations; and (v) recognition of revenue when (or as) the Institute satisfies each performance obligation.



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

**NOTES TO FINANCIAL STATEMENTS**  
December 31, 2024

**Note 2**

**Summary of Significant Accounting Policies (continued)**

Members are billed annually and have no obligation to pay, thus the recognition of the revenue process begins when dues are received. These amounts are recognized or deferred based on a twelve-month service period.

Annual conference fees are recorded when received, or deferred if received prior to the conference year. Since members are not obligated to attend and fees are received prior to or during the conference, no overlap exists between years.

Members are located throughout the United States and internationally. Membership dues become due throughout the year.

Donated Services – The Institute receives donated services from a variety of unpaid volunteers assisting the Institute at its conference. No amounts have been recognized in the accompanying statement of activities because the criteria for recognition of such volunteer efforts have not been satisfied.

Functional Allocation of Expenses – The cost of providing the Institute's programs and other activities is summarized on a functional basis in the statement of functional expenses. Expenses that can be identified with a specific program or support service are charged directly to that program or support service. Costs common to multiple functions have been allocated among the various functions benefited based on total expenses.

Use of Estimates – The preparation of financial statements in conformity U.S. GAAP requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

Advertising Costs – The Institute's advertising costs are expensed as incurred.

Income Tax Status – The Institute is exempt from federal income tax under Section 501(c)(6) of the Internal Revenue Code ("IRC"). In addition, the Institute qualifies for the charitable contribution deduction under IRC Section 170(b)(1)(a) and has been classified as an organization that is not a private foundation under IRC Section 509(a)(2).

Since the Institute is exempt from federal and state income tax liability, no provision is made for current or deferred income taxes. The Institute uses the same accounting method for tax and financial reporting.



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

**NOTES TO FINANCIAL STATEMENTS**  
December 31, 2024

**Note 2      Summary of Significant Accounting Policies (continued)**

Generally Accepted Accounting Principles provide accounting and disclosure guidance about positions taken by the Institute in its tax returns that might be uncertain. Management has considered its tax positions and believes that all of the positions taken by the Institute in its federal and state exempt organization tax returns are more likely than not to be sustained upon examination. The Institute's returns are subject to examination by federal and state taxing authorities, generally for four years after they are filed.

Summarized Prior Year Information – The financial statements include summarized comparative information from the prior year, which is not presented by net class or include comparative footnotes, and does not include sufficient detail to conform with U.S. GAAP. This information should be read in conjunction with the Institute's financial statements for the year ended December 31, 2023, for which the comparative information was extracted.

Date of Management's Review – Subsequent events have been evaluated through April 24, 2025, which is the date the financial statements were available to be issued.

**Note 3      Concentration of Credit Risk**

The Federal Deposit Insurance Corporation (“FDIC”) insures cash in checking, money market and savings accounts up to \$250,000. The Institute has not experienced any losses in such accounts and believes it is not exposed to any significant credit risk for cash and cash equivalents. As of December 31, 2024, balance in excess of \$250,000 at various banks were \$827,697.

The Institute maintains cash and cash equivalents in bank deposit accounts with a financial institution that provides coverage over the federally insured limits by utilizing a network of other financial institutions. As of December 31, 2024, the balances maintained in these accounts were \$1,438,091.

The Institute has a balance of \$1,077,697 invested as of December 31, 2024. Of this amount, \$69,150 is reflected in the cash and cash equivalents balance on the Statement of Financial Position. The Securities Investor Protection Corporation (“SIPC”) insures investments up to \$500,000 of which \$250,000 may be cash. Insurance protects assets in the case of broker-dealer insolvency and not against decline in the market values.



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

**NOTES TO FINANCIAL STATEMENTS**  
December 31, 2024

**Note 4      Liquidity and Availability**

The Institute strives to maintain liquid financial assets sufficient to cover 90 days of general expenditures. Financial assets in excess of daily cash requirements are invested in certificates of deposit, money market funds and other short-term investments.

The following table reflects the Institute's financial assets as of December 31, 2024, reduced by amounts that are not available to meet general expenditures within one year of the statement of financial position date because of contractual restriction or internal board designations. Amounts not available include a board-designated operating reserve fund that is intended to fund operations as defined in the operating reserve policy. In the event the needs arise to utilize the board-designated funds for liquidity purposes, the reserves could be drawn upon through approval of the budget and planning committee. Amounts not available to meet general expenditures within one year also may include net assets with donor restrictions. There were no assets with donor restrictions at December 31, 2024.

Cash and cash equivalents	\$ 1,772,151
Investments	1,008,547
Accounts receivable	<u>49,847</u>
Total financial assets	<u>2,830,545</u>
Less board-designated for operating reserve	<u>(1,077,697)</u>
Financial assets available to meet cash needs for general expenditures within one year	<u>\$ 1,752,848</u>

**Note 5      Investments and Fair Value Measurements**

The Institute's investments are stated at fair value based on quoted market values and are summarized as follows as of December 31, 2024:

	FMV	Cost
Fixed Income (Level 1)	\$ 657,935	\$ 657,000
Exchange Traded Funds (Level 1)	212,406	212,226
Equities Funds (Level 1)	71,051	52,672
Bond Funds (Level 1)	<u>67,155</u>	<u>66,313</u>
Total Investments	<u>\$ 1,008,547</u>	<u>\$ 988,211</u>



**INTERNATIONAL INSTITUTE OF  
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**NOTES TO FINANCIAL STATEMENTS**  
December 31, 2024

**Note 5 Investments and Fair Value Measurements (continued)**

In accordance with Accounting Standards, levels 1 through 3 have been assigned to the fair value measurement of investment types. The fair value measurement is determined as follows:

Level 1 - quoted prices in an active market for identical assets.

Level 2 - quoted prices for similar assets and market-corroborated inputs.

Level 3 - the Institute's own assumptions about the market participation, including assumptions about risk, developed based on the best information in the circumstances.

Investment income for the year ended December 31, 2024 are as follows:

Realized and unrealized gain (net)	\$ 30,712
Interest and dividends	<u>44,822</u>
Total Investment Income	<u><u>\$ 75,534</u></u>

**Note 6 Property and Equipment**

Property and equipment consist of the following:

	Cost	Useful Lives
Land	\$ 321,408	
Building and improvements	1,135,452	39 years
Furniture	78,969	7 years
Office equipment	19,876	5 years
Computer equipment and software	<u>189,332</u>	5 years
	1,745,037	
Less accumulated depreciation	<u>(971,220)</u>	
Total Property and Equipment	<u><u>\$ 773,817</u></u>	

**Note 7 Accumulated Vacation and Sick Leave**

The Institute offers its employees compensated vacation and sick leave. Under these policies, employees may be compensated for accumulated unused vacation, but not sick leave upon termination of employment. The Institute's liability for such compensated absences is \$48,931 at December 31, 2024 and is included within accrued liabilities.



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**NOTES TO FINANCIAL STATEMENTS**  
December 31, 2024

**Note 7      Accumulated Vacation and Sick Leave (continued)**

Accumulated sick leave benefits are not recognized as liabilities as payment of such benefits is not estimable. Therefore, sick leave benefits are recorded as expenditures in the period sick leave is taken.

**Note 8      Mortgage Payable**

Mortgage payable to Manufacturer's Bank, secured by land and building. The required monthly payment of principal and interest is \$2,786. The note bears interest at FHLB Rate at disbursement date plus 2.25%, but not to exceed 3.5%. The loan matures in January 2031.

	\$      492,900
Less current portion	<u>(16,117)</u>
Long-term mortgage payable	476,783
Unamortized loan costs	<u>(4,414)</u>
Long-term mortgage payable, net of loan costs	<u>\$      472,369</u>

The costs incurred to obtain the mortgage have been capitalized as follows:

	Cost	Useful life
Loan fees	\$      7,358	10 years
Less accumulated amortization	<u>(2,944)</u>	
Total Capitalized Costs	<u>\$      4,414</u>	

Maturities of long-term debt:

Year	Principal
2025	\$      16,117
2026	16,691
2027	17,287
2028	17,899
2029	18,536
Thereafter	<u>406,370</u>
	<u>\$      492,900</u>



**INTERNATIONAL INSTITUTE OF  
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**NOTES TO FINANCIAL STATEMENTS**  
December 31, 2024

**Note 9      Deferred Compensation Plan**

The Institute offers its employees a deferred compensation plan created in accordance with Internal Revenue Code section 457 (“The Plan”). The Plan permits all eligible employees to execute an individual agreement with the Institute for amounts earned by them, to be paid at a future date when certain circumstances are met. These circumstances include termination by reason of retirement, death, disability or other events as provided for in The Plan. Employees may contribute up to 25% of eligible employee compensation into the deferred compensation plan, which is limited to the annual statutory maximum. The Institute contributed \$56,136 during 2024 to The Plan on behalf of the employees.

**Note 10      Commitments and Contingencies**

The Institute entered into a four-year employment contract expiring December 31, 2026. Should employment terminate based on the employee not meeting the adopted performance criteria of the Institute, it is obligated to pay six (6) months remuneration. The estimated obligation pertaining to the service contracts is \$423,296 over the remaining term of the contracts as of December 31, 2024.

**Note 11      Supporting Foundation**

The International Institute of Municipal Clerks Foundation was established in 1984 as a tax-exempt Foundation under Section 501(c)(3) as a nonprofit organization to raise funds for the Institute. All funds provided to the Institute by the Foundation are used to facilitate education services to the Institute’s members. The Institute recognized revenue in the amount of \$43,067 during the year ended December 31, 2024, which is included within education revenue on the statement of activities.



# INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Budget & Planning Committee

**From:** Chris Shalby, Executive Director  
Shannon Kane, Finance Specialist

**Date:** April 22, 2025

**Subject:** 2025 First Quarter Notes



The first quarter, March 2025 reflects a Net Profit of \$624,375. This is \$558,660 over the projected annual budget of \$65,715 and \$74,595 over the first quarter budget of \$549,780. When comparing March 2025 with March 2024, the 2025 net income is \$229,828 more than the March 2024 net income.

## Reserve Balance

MMA – Operating	\$ 997,017
MMA – Board Designated Reserves – Cash	\$ 354,478
MMA – Board Designated Reserves – Schwab	<u>\$1,077,088</u>
Total MMA – Board Designated Reserves	\$2,428,583

Please note that (\$7,021) of the Schwab balance is the unrecognized loss of the investments as of 3/31/2025.

SCHWAB ACTIVITY FROM OPENING IN 2023 – 3/31/2025	
Schwab Initial Investment	\$ 750,000
CD closed and deposited to Schwab	<u>\$ 239,265</u>
Total funds initially deposited to Schwab	\$ 989,265
Value at 3/31/25	<u>\$1,077,088</u>
Total Increase in value	\$ 87,823
Plus Unrealized Loss	<u>\$ 7,021</u>
Income received in interest, dividends, gains	\$ 94,844

## Administrative

- Administrative has a net loss of (\$128,261) compared to the budget of (\$143,284).
  - **Income** – Earned (\$4,380) less than budgeted.  
Income is less than budgeted due to Schwab activity. Interest income earned \$2,890 more than the budget of \$15,000. Realized gain and unrealized gains are not budgeted for and ended the quarter at (\$249) in realized losses and (\$7,021) in unrealized losses.
  - **Expenses** – Expended (\$19,403) less than budgeted.

## Building

- Building has a net loss of (\$11,092) compared to the budget of (\$10,079).
  - **Income** – Earned the amount budgeted.
  - **Expenses** – Expended (\$1,012) less than budgeted.

## Committees

- **Executive Committee** – Expended (\$83) less than budgeted.
- **Board of Directors** – Expended (\$3,788) less than budgeted.
- **Other Committees** – Expended \$11,119 more than budgeted. This is a result of the Futures Task Force.

## Conference

- Conference has a net profit of \$442,465 compared to the budget of \$449,250.
  - **Income** – Earned (\$16,574) less than budgeted. Conference income is recognized as it is paid resulting in a large number for the first quarter.
  - **Expenses** – Expended (\$9,789) less than budgeted. The bulk of conference expenses will not be recognized until the second quarter.

## Education

- Education has a net profit of \$17,763 compared to the budget of \$20,354.
  - **Income** – Earned (\$24,958) less than budgeted. This is due to a shortage of (\$24,880) for the Region XI Symposium.
  - **Expenses** – Expended (\$22,277) less than budgeted. Also related to a timing difference for the Symposium with expenses expected in the second and third quarters.

## Marketing

- Marketing has a net loss of (\$32,477) compared to the budget of (\$35,226).
  - **Income** – Earned \$957 more than budgeted.
  - **Expenses** – Expended (\$1,793) less than budgeted.

## Membership

- Membership has a net profit of \$378,563 compared to the budget of \$304,014.
  - **Income** – Earned \$71,959 more than budgeted.
  - **Expenses** – Expended (\$2,590) less than budgeted.

**IIMC Financials**

**FISCAL YEAR 2025**

**March 31, 2025**

**Statement of Financial Position**

	Current Year	Prior Year
<b>ASSETS</b>		
Current Assets		
Petty Cash	648	348
General Checking	825,239	760,738
MMA - Operating	997,017	1,114,150
MMA - Reserve Accounts	354,478	197,680
Charles Schwab Investments	1,077,088	1,032,856
Accounts Receivable	29,947	24,489
Prepaid Expense	78,045	56,735
	<b>3,362,462</b>	<b>3,186,996</b>
	<b>Total Current Assets</b>	
Land	321,408	321,408
Building and Improvements	419,811	402,273
Furniture and Equipment	8,775	10,830
Computer Software	16,514	21,847
Loan Cost	4,230	4,966
	<b>770,739</b>	<b>761,324</b>
	<b>Total Property and Equipment</b>	
	<b>TOTAL ASSETS</b>	<b>4,133,201</b>
	<b>3,948,321</b>	
<b>LIABILITIES AND EQUITY</b>		
<i>Current Liabilities</i>		
Accounts Payables	18,490	49,002
Accrued Expense	65,414	57,496
Deferred Revenue	931,302	977,074
Grants Payable	-	841
Due to Foundation	2,200	2,325
	<b>1,017,407</b>	<b>1,086,738</b>
	<b>Total Current Liabilities</b>	
<i>Long Term Liabilities</i>		
Tenant - Security Deposit	6,150	6,150
Mortgage Loan	488,917	504,396
	<b>495,067</b>	<b>510,496</b>
	<b>Total Long Term Liabilities</b>	
<i>EQUITY</i>		
Equity	1,996,353	1,956,540
Net Income/(Loss)	624,375	394,547
	<b>2,620,728</b>	<b>2,351,087</b>
	<b>Total Equity</b>	
	<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>4,133,201</b>
	<b>3,948,321</b>	

## IIMC Financials

FISCAL YEAR 2025

SUMMARY TOTALS

March 31, 2025

Department	Prior Yr Actual	Annual Budget	YTD Actual	YTD Budget	YTD Variance	Annual Variance	Annual Projections
INCOME:							
Administration	34,188	60,000	10,620	15,000	(4,380)	(49,380)	60,000
Building	17,203	68,820	17,203	17,205	(2)	(51,617)	68,820
Conference	395,489	630,136	513,926	530,500	(16,574)	(111,210)	630,136
Education	72,704	423,300	139,617	164,575	(24,958)	(283,683)	423,300
Marketing	6,448	29,250	8,269	7,313	957	(20,981)	29,250
Membership	369,111	1,580,000	466,959	395,000	71,959	(1,113,041)	1,580,000
Total Income	895,143	2,791,506	1,156,594	1,129,593	27,001	(1,629,912)	2,791,506
EXPENSES:							
Administration	147,325	651,136	138,881	158,284	19,403	512,256	651,136
Building	28,414	128,134	28,295	27,284	(1,012)	99,839	128,134
Committee - Board of Directors	12,365	138,000	9,237	13,025	3,788	128,763	138,000
Committee - Executive	18,438	33,400	8,267	8,350	83	25,133	33,400
Committees - Other	(0)	30,700	24,994	13,875	(11,119)	5,706	42,219
Conference	114,212	631,941	71,461	81,250	9,789	560,480	631,941
Education	73,515	576,883	121,944	144,221	22,277	454,939	581,883
Marketing	39,161	170,154	40,746	42,539	1,793	129,408	170,154
Membership	67,166	365,443	88,396	90,986	2,590	277,047	365,443
Total Expense	500,596	2,725,791	532,219	579,812	47,593	2,193,572	2,742,310
PROFIT/(LOSS)							
Administration	(113,137)	(591,136)	(128,261)	(143,284)	15,023	462,875	(591,136)
Building	(11,211)	(59,314)	(11,092)	(10,079)	(1,014)	48,222	(59,314)
Board of Directors	(12,365)	(138,000)	(9,237)	(13,025)	3,788	128,763	(138,000)
Committee - Executive	(18,438)	(33,400)	(8,267)	(8,350)	83	25,133	(33,400)
Committees - Other	0	(30,700)	(24,994)	(13,875)	(11,119)	5,706	(42,219)
Conference	281,277	(1,805)	442,465	449,250	(6,785)	444,270	(1,805)
Education	(811)	(153,583)	17,673	20,354	(2,682)	171,256	(158,583)
Marketing	(32,714)	(140,904)	(32,477)	(35,226)	2,749	108,427	(140,904)
Membership	301,945	1,214,557	378,563	304,014	74,549	(835,994)	1,214,557
Net Profit/(Loss)	394,547	65,715	624,375	549,780	74,595	558,660	49,196

## IIMC Financials

FISCAL YEAR 2025

Administrative

March 31, 2025

Description	Prior YR Actual	Annual Budget	YTD Actual	YTD Budget	YTD Variance	Annual Variance	Annual Projections
<b>INCOME</b>							
Interest	14,995	60,000	17,890	15,000	2,890	(42,110)	60,000
Realized Gain or (Loss)	6,207	-	(249)	-	(249)	(249)	-
Unrealized Gain or (Loss)	12,986	-	(7,021)	-	(7,021)	(7,021)	-
Total Income	34,188	60,000	10,620	15,000	(4,380)	(49,380)	60,000
<b>EXPENSES</b>							
Personnel Costs	94,860	420,730	101,550	105,182	3,633	319,180	420,730
Other	773	3,000	517	750	233	2,483	3,000
Staff Travel	1,982	8,070	-	2,018	2,018	8,070	8,070
Professional Develop/Training	-	1,500	-	375	375	1,500	1,500
Professional Services	12,000	66,000	-	12,000	12,000	66,000	66,000
Legal Fees	-	2,500	-	625	625	2,500	2,500
Computer Costs	18,685	65,000	20,673	16,250	(4,423)	44,327	65,000
Office Equipment	3,076	12,636	1,658	3,159	1,501	10,978	12,636
Office Expense	7,345	32,800	4,530	8,200	3,670	28,270	32,800
Credit Card/Bank Fees	5,540	27,400	7,987	6,850	(1,137)	19,413	27,400
Memberships	-	1,000	-	250	250	1,000	1,000
Taxes Business	-	500	-	125	125	500	500
Depreciation Furn/Amortization Exp	3,062	10,000	1,965	2,500	535	8,035	10,000
Total Expense	147,325	651,136	138,881	158,284	19,403	512,256	651,136
Net Profit/Loss	(113,137)	(591,136)	(128,261)	(143,284)	15,023	462,875	(591,136)

## IIMC Financials

FISCAL YEAR 2025

Building

March 31, 2025

Description	Prior YR Actual	Annual Budget	YTD Actual	YTD Budget	YTD Variance	Annual Variance	Annual Projections
<b>INCOME</b>							
Rental Income	17,203	68,820	17,203	17,205	(2)	(51,617)	68,820
Total Income	17,203	68,820	17,203	17,205	(2)	(51,617)	68,820
<b>EXPENSES</b>							
Amortize Loan Costs	184	734	184	184	(0)	550	734
Association Fees	800	2,400	600	600	-	1,800	2,400
Depreciation Building	5,994	26,000	6,383	6,500	117	19,617	26,000
Insurance Fire/Property	1,112	4,500	1,512	1,125	(387)	2,988	4,500
Mortgage Interest	4,562	18,000	4,376	4,500	124	13,624	18,000
Property Tax	-	19,000	-	-	-	19,000	19,000
Building Repairs and Maint	11,161	41,500	10,849	10,375	(474)	30,651	41,500
Utilities	4,001	16,000	4,392	4,000	(392)	11,608	16,000
Property Manager	600	-	-	-	-	-	-
Total Expense	28,414	128,134	28,295	27,284	(1,012)	99,839	128,134
Net Profit/Loss	(11,211)	(59,314)	(11,092)	(10,079)	(1,014)	48,222	(59,314)

## IIMC Financials

FISCAL YEAR 2025

Committees

March 31, 2025

Description	Prior YR Actual	Annual Budget	YTD Actual	YTD Budget	YTD Variance	Annual Variance	Annual Projections
<b>EXECUTIVE COMMITTEE:</b>							
Meeting Expenses	-	100	-	25	25	100	100
Travel	18,438	33,300	8,267	8,325	58	25,033	33,300
Total Executive Committee Expense	18,438	33,400	8,267	8,350	83	25,133	33,400
<b>BOARD OF DIRECTORS:</b>							
<i>General</i>							
Region XI Consultant	5,250	11,500	5,250	5,750	500	6,250	11,500
Region X Consultant	-	1,500	-	375	375	1,500	1,500
Insurance Officers & Directors	3,164	3,200	3,222	3,200	(22)	(22)	3,200
Legal Fees	-	1,500	-	375	375	1,500	1,500
Strategic Planning/Board Development	-	8,000	-	2,000	2,000	8,000	8,000
Memorials	-	500	200	125	(75)	300	500
Parliamentarian Expense	1,500	8,500	-	-	-	8,500	8,500
Other Expenses	-	800	126	200	74	674	800
General	9,914	35,500	8,798	12,025	3,227	26,702	35,500
<i>Mid-Year</i>							
Travel	1,007	68,500	-	-	-	68,500	68,500
Meeting Expense	-	3,000	-	-	-	3,000	3,000
Mid-Year	1,007	71,500	-	-	-	71,500	71,500
<i>Conference</i>							
Travel	1,444	20,000	439	1,000	561	19,561	20,000
Board Meeting Expense	-	11,000	-	-	-	11,000	11,000
Conference	1,444	31,000	439	1,000	561	30,561	31,000
Total Board of Directors Expense	12,365	138,000	9,237	13,025	3,788	128,763	138,000
<b>OTHER COMMITTEES</b>							
BUDGET & PLANNING	(0)	15,700	0	-	(0)	15,700	15,700
RECORDS MANAGEMENT	-	1,500	-	375	375	1,500	1,525
<b>TASK FORCE(S):</b>							
TASK FORCE(S) - EDUCATION	-	13,500	24,994	13,500	(11,494)	(11,494)	24,994
Total Other Committees Expense	(0)	30,700	24,994	13,875	(11,119)	5,706	42,219
<b>Executive Committee</b>	18,438	33,400	8,267	8,350	83	25,133	33,400
<b>Board of Directors</b>	12,365	138,000	9,237	13,025	3,788	128,763	138,000
<b>Other Committees</b>	(0)	30,700	24,994	13,875	(11,119)	5,706	42,219
Total Expense	30,803	202,100	42,497	35,250	(7,247)	159,603	213,619
Net Profit/Loss	(30,803)	(202,100)	(42,497)	(35,250)	7,247	(159,603)	(213,619)

## IIMC Financials

FISCAL YEAR 2025

Conference

March 31, 2025

Description	Prior Yr Actual	Annual Budget	YTD Actual	YTD Budget	YTD Variance	Annual Variance	Annual Projections
<b>INCOME</b>							
Registration Members-Full	326,618	455,000	419,459	445,000	(25,541)	(35,541)	455,000
Registration Discounts	-	(47,270)	-	-	-	47,270	(47,270)
Registration Guest	9,955	6,625	7,519	4,500	3,019	894	6,625
Donations & Sponsorships	15,250	72,450	16,600	15,000	1,600	(55,850)	72,450
Exhibitor Program	8,800	60,000	27,950	30,000	(2,050)	(32,050)	60,000
Cancellation Fee	-	5,000	-	-	-	(5,000)	5,000
Misc Conference Revenue	2,500	25,911	-	-	-	(25,911)	25,911
Academy Workshop	26,871	32,220	36,093	27,000	9,093	3,873	32,220
Athenian Leadership Society	5,495	13,200	6,305	9,000	(2,695)	(6,895)	13,200
Offsite Education Program	-	5,000	-	-	-	(5,000)	5,000
Boutique Sales	-	2,000	-	-	-	(2,000)	2,000
Total Income	395,489	630,136	513,926	530,500	(16,574)	(111,210)	630,136
<b>EXPENSES</b>							
Conference Planner	21,130	96,900	19,962	23,100	3,138	76,938	96,900
Academy Expenses	4,259	23,550	-	-	-	23,550	23,550
General/Plenary Speakers Expenses	10,250	34,300	12,250	15,000	2,750	22,050	34,300
Speaker Expenses	7,688	55,000	2,500	2,500	-	52,500	55,000
Staff Conference Travel	15,445	31,991	9,804	10,500	696	22,187	31,991
VIP Travel	-	13,000	-	-	-	13,000	13,000
Conference Events	-	60,500	57	-	(57)	60,443	60,500
Food & Beverage	33,751	154,500	-	-	-	154,500	154,500
Audio/Visual	-	90,000	-	-	-	90,000	90,000
Conference Printing/Design Work	850	7,500	875	1,000	125	6,625	7,500
Conference Scanning Expense	-	-	-	-	-	-	-
Conference Expense	20,839	64,700	26,014	29,150	3,136	38,686	64,700
Total Expense	114,212	631,941	71,461	81,250	9,789	560,480	631,941
Net Profit/Loss	281,277	(1,805)	442,465	449,250	(6,785)	444,270	(1,805)

## IIMC Financials

FISCAL YEAR 2025

Education

March 31, 2025

Description	Prior Yr Actual	Annual Budget	YTD Actual	YTD Budget	YTD Variance	Annual Variance	Annual Projections
<b>INCOME:</b>							
Foundation Contribution/Policy 8	-	25,000	-	-	-	(25,000)	25,000
Fees CMC	11,900	58,000	18,050	14,500	3,550	(39,950)	58,000
MMC Fees	21,220	50,000	18,515	12,500	6,015	(31,485)	50,000
Sales Pins and Plaques	(665)	-	(320)	-	(320)	(320)	-
Distance Ed Registration	40,249	150,000	28,252	37,500	(9,248)	(121,748)	150,000
New Institute Application Fees	-	300	-	75	(75)	(300)	300
Region XI Symposium	-	140,000	75,120	100,000	(24,880)	(64,880)	140,000
	<b>Total Income</b>	<b>72,704</b>	<b>423,300</b>	<b>139,617</b>	<b>164,575</b>	<b>(24,958)</b>	<b>(283,683)</b>
<b>EXPENSES:</b>							
Personnel Costs	58,417	365,283	88,015	91,321	3,306	277,268	365,283
Staff Travel	-	3,100	754	775	21	2,346	3,100
Professional Develop/Training	-	2,000	300	500	200	1,700	2,000
MCEF - Region Stipends	3,000	12,000	4,000	3,000	(1,000)	8,000	12,000
Region XI Symposium	-	140,000	10,143	35,000	24,857	129,857	140,000
Distance Ed	7,700	24,000	9,700	6,000	(3,700)	14,300	24,000
Pins and Plaques	-	5,000	-	1,250	1,250	5,000	5,000
Computer/Software Support	683	5,000	5,824	1,250	(4,574)	(824)	10,000
Office Expenses	1,510	10,500	1,154	2,625	1,471	9,346	10,500
Bank Fees	2,206	10,000	2,055	2,500	445	7,945	10,000
	<b>Total Expense</b>	<b>73,515</b>	<b>576,883</b>	<b>121,944</b>	<b>144,221</b>	<b>22,277</b>	<b>454,939</b>
	<b>Net Profit/Loss</b>	<b>(811)</b>	<b>(153,583)</b>	<b>17,673</b>	<b>20,354</b>	<b>(2,682)</b>	<b>171,256</b>
							<b>(158,583)</b>

## IIMC Financials

FISCAL YEAR 2025

Marketing

March 31, 2025

Description	Prior Yr Actual	Annual Budget	YTD Actual	YTD Budget	YTD Variance	Annual Variance	Annual Projections
<b>INCOME</b>							
Advertising	6,216	27,250	8,027	6,813	1,214	(19,223)	27,250
Royalty	-	200	28	50	(22)	(172)	200
Mailing Lists	-	500	-	125	(125)	(500)	500
Merchandise	-	500	-	125	(125)	(500)	500
Publications	232	800	214	200	14	(586)	800
Total Income	6,448	29,250	8,269	7,313	957	(20,981)	29,250
<b>EXPENSES</b>							
Personnel	35,893	158,304	38,405	39,576	1,171	119,899	158,304
Staff Travel	(1)	2,000	-	500	500	2,000	2,000
Professional Development	-	300	-	75	75	300	300
Bank Fees	125	150	7	38	30	143	150
Design Work (non conference)	-	500	-	125	125	500	500
Postage and Shipping	-	100	-	25	25	100	100
Design/News Digest/Misc	2,027	8,200	2,293	2,050	(243)	5,907	8,200
Printing - Publications	1,116	500	40	125	85	460	500
Total Expense	39,161	170,154	40,746	42,539	1,793	129,408	170,154
Net Profit/Loss	(32,714)	(140,904)	(32,477)	(35,226)	2,749	108,427	(140,904)

## IIMC Financials

FISCAL YEAR 2025

Membership

March 31, 2025

Description	Prior Yr Actual	Annual Budget	YTD Actual	YTD Budget	YTD Variance	Annual Variance	Annual Projections
<b>INCOME</b>							
Membership Dues	367,221	1,575,000	463,999	393,750	70,249	(1,111,001)	1,575,000
Membership Late Fee	1,890	5,000	2,960	1,250	1,710	(2,040)	5,000
Total Income	<u>369,111</u>	<u>1,580,000</u>	<u>466,959</u>	<u>395,000</u>	<u>71,959</u>	<u>(1,113,041)</u>	<u>1,580,000</u>
<b>EXPENSES</b>							
Personnel	53,774	262,748	58,713	65,687	6,974	204,035	262,748
Staff Travel	907	5,275	426	1,319	893	4,849	5,275
Professional Develop/Training	-	1,170	-	293	293	1,170	1,170
Membership Drive	-	15,100	7,463	3,775	(3,688)	7,637	15,100
Research Salary Survey Services	-	1,500	-	-	-	1,500	1,500
Dues Mailing	(3,886)	19,500	5,170	4,875	(295)	14,330	19,500
Computer/Software Support	8,336	25,000	5,753	6,250	498	19,248	25,000
Office Expense	36	4,750	3	1,188	1,184	4,747	4,750
Bank Fees	7,909	30,000	10,778	7,500	(3,278)	19,222	30,000
Membership	90	400	90	100	10	310	400
Total Expense	<u>67,166</u>	<u>365,443</u>	<u>88,396</u>	<u>90,986</u>	<u>2,590</u>	<u>277,047</u>	<u>365,443</u>
Net Profit/Loss	<u>301,945</u>	<u>1,214,557</u>	<u>378,563</u>	<u>304,014</u>	<u>74,549</u>	<u>(835,994)</u>	<u>1,214,557</u>

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To: IIMC Board of Directors**

**From: Karen Lee, Communications Officer**

**Date: April 1, 2025**

**Subject: IIMC Communications Annual Report**

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The metrics in this report reflect data collected 09/2024 – 03/2025

The IIMC Communications Department continues to increase outreach, strengthen support, and provide IIMC resources and marketing promotions.

### WEBSITE

The Communications Department works to improve the suite of resources on the IIMC website and ease of access for members. The department works closely with Member Services and the Education Department to keep content fresh and accurate.

### 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.

Increased readership and a weekly cleanup of member contact information—removal of expired and expiring email addresses to improve the integrity of the mailing list—yield an *E-Briefing average open rate of 37%*<sup>1</sup>.

On request, a Foundation newsletter was created and was distributed in April 2025.

### REGION NEWSLETTERS, MESSAGES, AND UPDATES

The Communications Department assisted the following IIMC Regions, Leaders, and Departments distribute various mass mail communications and special announcements.

#### Metrics:

- **Region I**
  - 2025 Spring Newsletter open rate: 43%
- **Region II**
  - 2025 Conference Registration open rate: 55%
- **Region III**
  - Fall 2024 Security Announcement, November 1, open rate: 38%
  - Region III 2025 Conference Announcement open rate: 37%
  - Winter 2024/2025 Newsletter open rate: 41%

<sup>1</sup> According to the [Influencer Marketing Hub](#), a good email open rate is between 17% - 28%. (Accessed April 11, 2025)

- Region III 2025 Board Director Election Announcement open rate: 58%
  - Spring 2025 Newsletter open rate: 45%
- **Region IV**
  - Region IV 2025 Conference Announcement open rate: 55%
- **Region V**
  - Region V 2025 Spring Updates: 42%
- **Region VI**
  - Fall 2024 Newsletter open rate: 45%
- **Region VIII East and West**
  - 2025 Conference Survey open rate: 55%
- **Region IX**
  - January 2025 Lunch with Region IX Region Directors event reminder open rate: 44%
- **IIMC President and Executive Director's Joint Updates**
  - February 27: VP Election Update open rate: 39%
  - April 3: VP Election Update open rate: 37%
- **IIMC Member Services**
  - 2025 Professional Municipal Clerks Week Invitation open rate: 54%

## **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 continuing goal is to direct *News Digest* readers to the IIMC websites via direct, one-click links.

## **ONLINE EVENTS**

- January 14, 2025: ***Lunch Time With Region IX***
- January 29, 2025: ***Region I CMC Information Session with Dr. Jai***
- March 13, 2025: ***Region I MMC Information Session with Dr. Jai***

## **SOCIAL MEDIA**

### **Facebook**

Facebook is the predominant social media platform maintained. Below is a comparative chart for each IIMC Facebook group.

<b>Group</b>	<b>March 2025</b>	<b>September 2025</b>
Region I	<b>280</b>	251
Region II	<b>331</b>	322
Region III	<b>803</b>	763
Region IV	<b>278</b>	258
Region V	<b>386</b>	375
Region VI	<b>216</b>	202

Region VII	<b>337</b>	319
Region VIII East	<b>97</b>	79
Region VIII West	<b>86</b>	69
Region IX	<b>329</b>	312
Region X	<b>111</b>	97
Region XI	<b>95</b>	86
EPP Cohort 1	<b>44</b>	44
2025 Annual Conference – St. Louis	<b>235</b>	NA

IIMC staff and members consider the increase in Facebook activity to be a good indication of an uptick in social networking.

### **LinkedIn**

The Education Department continues to post articles and resources on the IIMC LinkedIn page.

## **COMMUNICATIONS AND EDUCATION**

The Department continues to work closely with Education to market its programs and resources. In addition to restructuring and managing education content on the IIMC website, the Communications and Education departments are working to implement the newly acquired Learning Management System, TopClass.

## **COMMUNICATIONS AND FOUNDATION**

The Department attends Foundation mid-year and annual meetings for communications collaboration. Communications attended a consultation and kick-off for the Foundation's website rebuild effort. Also, we collaborated on developing a Foundation newsletter.

## **MILESTONES**

- Development of a best practices system for updating annual and seasonal website information.
- Population of [IIMC 2025 Annual Conference website](#) and implementation of IIMC 2025 Annual Conference resources and tool kit, including preliminary program.
- Population and maintenance of IIMC Board Candidate page at start of and throughout extended election season.
- Development and editing of two versions of VP virtual forum videos.
- Implementation of TopClass Learning Management System which included leading initial training and over 150 hours of webinar video editing.
- Collaboration with Public Relations and Marketing committee to design, develop, and distribute new IIMC mascot, Quill the Hedgehog.

**Management's Comments:** The Department is relied upon internally and from Region Directors. IIMC's communication endeavors continue to be strong as numbers and percentages indicate. The communication regarding the VP Election was expeditious, expressive, and conveyed the Board's direction appropriately. We are working on IIMC's 80<sup>th</sup> anniversary logo, which kicks off the 2026 year. We are also looking at revising the *News Digest*.

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Board of Directors

**From:** **Janis Daudt, Director of Member Services**  
**Tammy Storrie, Assistant Director of Member Services**  
**Stephanie Galarza, Member Services Representative**

**Date:** April 10, 2025

**Subject:** Member Services Year End Report 2024-2025

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The 79<sup>th</sup> IIMC Annual Conference Registration is in full swing for both conference Delegate registration and Exhibitor registration. Our members seem to have acquainted themselves with the online registration process and the Exhibitors are still asking many questions. There is a learning curve for this new process for both IIMC Staff and Exhibitors. Our Exhibit Hall is sold out. We have 718 Delegates and 301 are First Time Attendees. Just as last year in Calgary, a First Time Attendee Pin has been created just for our First Timers.

Our association software (iMIS) has made many improvements for Member Services. The additions to customer service have been:

- 1) online conference registration.
- 2) member packets automatically being sent to new members.
- 3) Member and Ethic Certificates automated for each new member and the ability to automatically send certificates to members who lost their originals.
- 4) Member Anniversary Certificates for 25, 30, 35, 40, 45 and 50-year memberships.

The online conference registration for 2025 has shown improvements such as the first-time attendees automatically receiving their First Time Attendee \$50.00 discount without having to use a discount code. The delegates in Region VII also receive an automatic discount of \$50.00. We did not offer a multi-attendee discount this year and to date, there have been no complaints.

With the new rates for Region X, Full Members pay \$185.00 and Additional and Associate Members pay \$125.00 through 2030. All member applications have been updated online, and pdf copies are able to be downloaded. With these locked in fees, Member Services created new member codes for Canadian Full Members, Additional Full Members and Associate Full Members so they may be billed separately.

IIMC Staff will be training in 2025 for the online staff site on which our software will allow our members to go into their own accounts, pay their dues, and make changes to their contact information.

The IIMC Vice President Election is on hold as of the day of this report. IIMC always receives questions about the ballot not arriving in the members inbox. When this happens and Janis is contacted, a ballot link is created and sent back to the person that did not receive their ballot. For the ballots that bounce back to SurveyMonkey, it is suspected that the municipality firewalls are not allowing the ballots from SurveyMonkey through or to even get to their destination. We have also found members that have "opted out" of receiving anything from SurveyMonkey. When this happens, I send a link for the ballot and a link to "opt in" so next year there should be

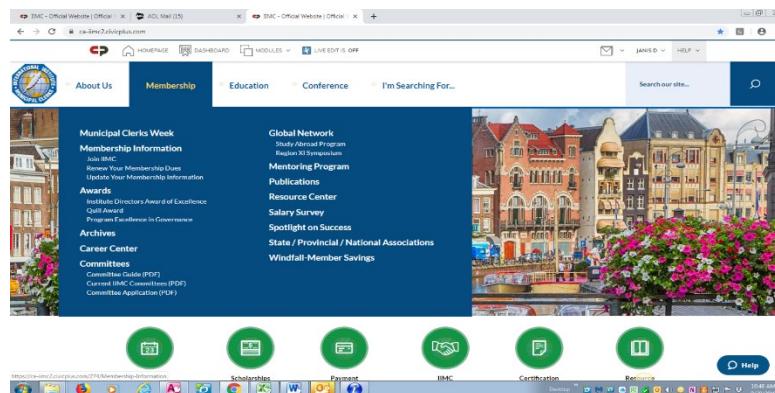
no problems. We have also received requests from people asking for a ballot, but find they are not IIMC Members. Another challenge is that members have not updated their new email address, so the ballot goes to an incorrect email. We verify each request and find that some of our members forget they voted and still request a link.

We are very pleased with the 22-25 Member Drive since starting promotion in late December 2022 and it has brought in 436 new members. Each new member will receive a free Captus Press education course (a \$50.00 savings). The difference from other IIMC member drives is that this drive is perpetual in that we remove municipalities when they join and add municipalities when they cancel.

Our Region Director Challenge brought in 21 new members since May 2024. Congratulations to Tory Frink, MMC with 9 new members, Angela Johnson, MMC with 5, Kathy Montejo, MMC with 4 and Lori McWilliams, MMC and Mark Donohue both with 2. We appreciate all the Region Directors' participation. Tory won two free conference registrations in St. Louis.

IIMC's Membership portion of the website allows our members to locate what they are looking for with ease. Our members may email or call us when in need of member contact information. Members have the convenience to pay their member dues online on our website and update contact information at the same time. We have three buttons under "Membership" on our website that states:

- Join IIMC
- Renew Your Membership Dues
- Update Your Membership Information



We have personal contact with our members daily, making certain we catch those members whose dues are about to expire, answer questions about the conference, dues renewals, membership, member transfers or retirements, and discuss the many job descriptions we receive from prospective new members each week. Tammy Storrie inputs new membership applications daily. We follow up with email and phone calls promptly. Tammy also sends the Month End Report to the Board along with excel reports which make it easy for the Region Directors to send out "Congratulations" and "Welcome to IIMC" letters.

We send out dues renewals as follows:

- First dues renewal by mail
- Reminder notice by mail
- Past Due notice by mail
- Final notice by email, and phone contact

Member Services has continued to aid members who are experiencing problems paying their member dues. Those that we have offered to assist have taken advantage of the IIMC offer.

We update all the State/Provincial/National Association Presidents, Education Chairs and News Editors and their contact information. If we have not been notified of the incoming President, we check the association website to see who the new President is and if the website has not been updated, we call to collect all necessary information.

We have created a “proactive” Retired Member Letter which is being sent to our 15 year or more members making them aware that IIMC has a membership waiting for them when they leave their profession. The letter provides answers to questions they might have when and if they plan to retire soon or years out such as the cost, home contact information needed and why they would wish to remain with IIMC.

Sharing some statistics for the following:

- Region Totals as of April 10, 2025
- Region I – 683
- Region II – 610
- Region III – 1,810
- Region IV – 680
- Region V – 964
- Region VI – 543
- Region VII – 819
- Region VIII East – 744
- Region VIII West - 647
- Region IX – 1,860
- Region X – 254
- Region XI – 5,905
- Grand Total 15,519

- Bulk Members in Region XI are from the following Associations:
  - ADSO United Kingdom – 1,538 members
  - IMASA South Africa – 125 members
  - SLCC United Kingdom – 3,664 members
  - VVG The Netherlands – 578 members

#### **Management’s Comments:**

As stated, the Department is active with membership recruitment while maintaining existing members. They are IIMC’s first point of contact with members, and customer service continues to be exemplary and person-to-person. The Department continues to generate recruitment letters as evident by the new membership numbers. They have automated quite a bit of their internal processes, leaving them to interact with members one-on-one.