



**International Institute of Municipal Clerks  
Board of Directors  
Mid-Year Meeting Agenda  
November 21-22, 2025**

**Hilton Garden Inn, Ontario, California**



**International Institute of Municipal Clerks**  
**Board of Directors ~ Midyear Meeting Agenda**  
**November 21-22, 2025**  
**Hilton Garden Inn, Ontario, California**

1.	Call to order	
2.	Roll call	
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4.	Consent agenda approval	
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	c. Ratify Board E-Vote from October 17, 2025 - Verbal	
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6.	Foundation Report Update – Buster Brown – Verbal	
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# International Institute of Municipal Clerks

## 2025/2026 IIMC Board of Directors Roster

Term: May 21, 2025 through May 20, 2026

### ***PURPOSE:***

### ***2025/2026 Goals & Objectives***

### ***Deadlines:***

<b>July 15, 2025</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, 2025</b>	File a Report with Headquarters for inclusion with agenda materials for the November IIMC Board of Directors Mid-Year Meeting.
<b>March 26, 2026</b>	File the final report with Headquarters for inclusion with the Annual Report.

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**Dawn G. Abrahamson, MMC****President**

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**Lee Frazier, MMC****President Elect**

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**Janice M. Bates, MMC****Vice President**

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**Kerri A. Parker, MMC****Region I Director**

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## 2025/2026 IIMC Board of Directors Roster

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## 2025/2026 IIMC Board of Directors Roster

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**Julie Barnett, MMC****Region VIII Director E**

City Clerk

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City Recorder

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City of Auburn

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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**Stephen Huycke, MMC****Region X Director**

Director, Legislative Services/City Clerk

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CANADA

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Director of Community Services &amp; City Clerk

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CANADA

**Phone:** (705) 360-2602**Fax:****Email:** steph.palmateer@timmins.ca**Linda Larter, MBE****Region XI Director**

Town Clerk

Sevenoaks Town Council

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**International Institute of Municipal Clerks**  
Annual Business Meeting  
St. Louis, MO  
Wednesday, May 21, 2025

**Call to Order**

President Lisa Garcia called to order the Annual Business Meeting at the 79<sup>th</sup> Annual Conference of the International Institute of Municipal Clerks at 7:08 a.m. MDT on Wednesday, May 21, 2025.

**Welcome to Delegates**

The executive committee members seated at the head table were introduced and President Garcia welcomed delegates and thanked them for attending the conference.

**Adoption of Standing Rules**

Without objection, the adoption of the standing rules was approved.

**Approval of Agenda**

Without objection, the agenda was approved as distributed.

**Minutes**

President Garcia explained the minutes of the 2024 annual business meeting were approved by the Board of Directors at their Annual meeting. Stephanie Kelly, MMC, stated her name was spelled incorrectly on page 4. The 2024 Annual Business Meeting minutes were approved with the spelling correction.

**IIMC Year in Review**

President Garcia provided a positive overview of the accomplishments made by IIMC and its members during the past year. She thanked the host committee for an amazing all-conference event and conference.

**IIMC Financial Report**

Budget Committee Chair Barbara Blackard reviewed IIMC financial report for the Year Ended December 31, 2024 which was provided to the delegates at the meeting. It was noted that IIMC had another great financial year.

**Foundation Report**

President Buster Brown introduced IIMC Foundation Board Members. The IIMC Foundation received 140 applications for scholarships with 28 awarded. President Brown noted the closing balance was \$3,260,326.

**2025 Conference Resolutions**

Angie Johnson, MMC, presented the Resolution recognizing the City of St. Louis, Missouri, for the 79<sup>th</sup> Annual Conference of the International Institute of Municipal Clerks to Karen Goodwin, MMC.

Ida Fierro, CMC, presented the Resolution recognizing the Host Clerk for the 79<sup>th</sup> Annual Conference of the International Institute of Municipal Clerk to Karen Goodwin, MMC.

Kathy Montejo, MMC, presented the Resolution recognizing Host State Association for the 79<sup>th</sup> Annual Conference of the International Institute of Municipal Clerks to Brooke Bell, CMC.

### **President's Award of Merit**

President Garcia presented the President's Award of Merit to Patricia Buchanan, Deputy City Clerk, City of Florence, AZ, and to Jannette Goodall, MMC, City Secretary, Ft. Worth, TX.

### **IIMC Chair of Elections Committee**

Jannette Goodall, MMC, stated the committee created four sub-committees to review the policies of the election committee and foster trust within the organization, encourage participation, and transparency.

### **Certificates of Appreciation – Outgoing IIMC 2024-2025 Committee Chairs**

President Garcia presented Certificates of Appreciation to Outgoing IIMC Committee Chairs:

Budget & Planning – Barbara Blackard, MMC

Conference – Helen Ingold, MMC

Education & Professional Development – Angila Bains, CMC

Elections – Jannette Goodall, MMC

Futures Group – Angela Johnson, MMC

IDEAL Committee – Stephanie Kelly, MMC and Toya Harrell, CMC

International Relations – Dwayne A. Caines

Membership/Mentoring – Sharon McFadden

Policy – Angela Richburg, MMC

Public Relations/Marketing – Chad Daggett, CMC

Records Management – Ariana Cisneros, CMC

Research & Resource – Audra Etzel, MMC

### **Certificates of Appreciation – Outgoing Region Directors**

President Garcia presented Certificates of Appreciation to Outgoing IIMC Region Directors:

Region I Director Kathleen Montejo, MMC, Lewiston, ME

Region II Director Travis O. Morris, CMC, Albemarle County, VA

Region III Director Tory Frink, MMC, Alamance County, NC

Region V Director Carrie Mugford, CMC, North Manchester, IN

Region VIII East Director Angela Johnson, MMC, Meeteetse, WY

Region VIII West Director Ida Fierro, CMC, Bernalillo, NM

Region IX Director Jamie Newman, MMC, Wasillo, AK

Region X Director Lana Antony, MMC, Coalvale, Alberta, Canada

Immediate Past President Mary Ann Hess, MMC, Brandon, MS

### **Election Results**

Elections Committee Chair Jannette Goodall, MMC, reported that for the Office of Vice President, 2,111 votes were cast. Janice Bates, MMC, received 776 votes, Travis Morris, MMC,

received 552 votes, Angela Johnson, MMC, received 429 votes, and Stephen Huycke, CMC, received 354 votes. President Garcia declared Janice Bates elected as Vice President.

### **Oath of Office – Incoming Directors**

President Garcia administered the oath of office to the following incoming IIMC Region Directors:

Region I Director Claudia A. Weber, CMC, New Canaan, CT  
Region II Director Stephanie Coulbourne, CMC, Milton, DE  
Region III Director Mark Massey, CMC, Savannah, GA  
Region V Director Joel H. Hondorp, CMC, Grand Rapids, MI  
Region VIII East Director Kellie R. Crowell, CMC, Ravenna, NE  
Region VIII West Director Cheryl Meredith, MMC, Kingman, AZ  
Region IX Director Shawn Campbell, MMC, Auburn, WA  
Region X Director Stephane Palmateer, Timmons, Ontario, Canada

### **Oath of Office – Incoming Executive Committee**

The oath of office was administered to the following executive committee members:

Past President, Lisa Garcia, MMC, by Tine Vervisch and Sophie Hermans.  
Vice President Janice Bates, MMC, by Helen Dunlap and Sonja Tolbert.  
President Elect Lee Fraizer, MMC, by Stephanie Kelly, MMC.  
President Dawn Abrahamson, MMC, by Colleen Nicol, MMC.

### **President's Comments**

President Abrahamson thanked everyone for trusting in her and all the work they do to serve their communities. She noted she is looking forward to the opportunity to strengthen the foundation. She thanked her family for their guidance and support.

### **Other Business**

Vinny Buttiglieri, MMC, noted silent auction winners need to pick up the items.

Stephanie Kelly, MMC, stated the Board of Directors would be meeting later and thanked the board for their transparency and leadership throughout the year. Kelly also asked the Board to create a Succession Plan regarding the Executive Director.

### **Invitation to the 2025 Annual Conference**

A video highlights the City of Reno, Nevada was presented for the 80<sup>th</sup> Annual Conference in 2026 and Dr. LuAnn Holmes, MMC, Las Vegas, Nevada, invited delegates to attend in May 2026 and highlighted the host hotel and All-Conference Event location.

### **Adjournment**

With no further business, the meeting adjourned at 8:28 a.m. CST.

Savanna Burton, CMC  
Deputy City Clerk  
Florissant, MO  
Recorder

INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS  
Virtual Board of Directors Meeting  
August 27, 2025  
Minutes

**CALL TO ORDER**

President Dawn Abrahamson called the meeting to order via Zoom at 9:03 a.m. PDT.

Roll Call taken by Office Manager, Janet Pantaleon

Board Members Present:

President Dawn Abrahamson, MMC

President Elect Lee Frazier, MMC

Vice President Janice Bates, MMC

Immediate Past President Lisa Garcia, MMC

Region I Directors: Kerri A. Parker, MMC; Claudia A. Weber, CMC

Region II Director: Awilda Hernandez, MMC; Stephanie Coulbourne, CMC

Region III Directors: Lori McWilliams, MMC; Mark Massey, CMC

Region IV Director; Sherri E. Gard, MMC; Curtis Greene, CMC

Region V Directors: Kathy J. Walker, MMC; Joel H. Hondorp, MMC

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

Region VII Directors: Leesa Ross, MMC; Sandra Maahs, MMC

Region VIII East Directors: Julie Barnett, MMC; Kellie R. Crowell, CMC

Region VIII West Directors: Colleen A. Mulvey, MMC; Cheryl "Annie" Meredith, MMC

Region IX Directors: Shawn Campbell, MMC

Region X Directors: Steph Palmateer

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

Board Member Absent: Marc A. Donohue, MMC and Stephen Huycke, CMC.

Parliamentarian, Nicole Learson

Staff Members Present:

Executive Director, Chris Shalby

Office Manager, Janet Pantaleon

**Agenda Approval**

President Abrahamson requested a motion to excuse absence Region Directors Marc Donohue and Stephen Huycke.

Region VII Director, Leesa Ross moved to excuse absence of Region Directors Stephen Huycke and Marc Donohue. ***Motion approved Unanimously***

Region XI Directors Linda Larter and Arnout van Kooij inquired regarding the lack of memo attachments for agenda items 9 thru 12. Items to be discussed at May meeting in Reno.

Minor scrivener's errors were corrected in the May 17, 2025, and May 21, 2025 minutes prior to approval.

Region VIII East Director, Julie Barnett motioned to adopt the amended agenda with the addition of adding agenda approval and adjournment. ***Motion approved Unanimously***

#### **Oath of Office**

President Abrahamson administered Oath of Office to new Region VIII West Director, Annie Meredith, MMC and Region VII Director, Sandra Maahs, MMC.

#### **Ranking Order of Policies**

President Abrahamson and Executive Director Chris Shalby discussed the ranking order of policies to reflect the following order:

1. Executive Session Policy
2. Social Media Policy
3. Board Transparency Policy
4. Opening Ceremony Flag Protocols

#### **Revised Policies**

Executive Director Shalby requested an extension on the review of the following two items due to his medical absence. The review of the revised policies was agreed to be moved to the Mid-Year meeting in November.

1. Executive Director Contract Policy – Director Shalby to write a new policy for presentation to Board in May.
2. Attorney Letter of Engagement – Executive Director Shalby explained that there has been no communication with the Board appointed attorney and she has not responded to any attempts to contact her. Current policy requires revisions.

#### **Ratification of E-Vote Board Liaisons**

President Abrahamson presented the ratification to approve the appointment of the two Board Liaisons to the Budget Committee. The two appointees are Region X Director, Stephen Huycke and Region VII Director Leesa Ross.

Region IX Director, Shawn Campbell motioned to ratify the e-vote appointing Region Directors Stephen Huycke and Leesa Ross to the Budget Committee. ***Motion approved Unanimously.***

#### **Ratification of E-Vote Member-at-large**

President Abrahamson presented the ratification to appoint member-at-large to the Budget Committee. Region IX Director, Shawn Campbell motioned to appoint Angela Johnson, MMC to the Budget Committee as Member-at-Large. ***Motion approved Unanimously.***

#### **Affiliation Agreements**

President Abrahamson noted for the record that Region XI Director van Kooij requested memos be provided with future agendas to allow sufficient time to review materials in advance.

President Abrahamson asked Executive Director Shalby and Parliamentarian, Nicole Learson to provide some background on the difference between the Affiliate Agreement and the Bulk Membership Agreements as they are two different agreements.

ED Shalby provided an overview of our six affiliation agreements Region XI outside of North America with the following affiliations; SLCC and ADSO in the United Kingdom, VVG in the Netherlands, IMASA in South Africa, SOLAR in Scotland and Excello.net in Belgium. This agreement is a reciprocal agreement that states invitation to attend each others conferences as well as the exchange of ideas and networking opportunities. These agreements have been working wonderfully and have been in place since 2008-2010.

The Bulk Membership began in 2014/2015 and took four of the six affiliations, SLCC, ADSO, VVG and IMASA to pay approximately \$2,000 each to IIMC and make all 5,000 of their members automatic IIMC members and receive the same benefits as other members of IIMC. IMASA would pay \$250 for the 200 members with full membership status. ED Shalby further explained that the issue to date is that the Membership Committee and Futures Committee is reviewing to see where the Bulk Membership falls within the membership and IIMC Constitution. The agreements have been forwarded to the IIMC attorney, but we have not yet received a response.

Parliamentarian Nicole Learson explained that her review of the two agreements raised the question of where this membership should be placed within the Constitution. This addition would not create a new classification of membership. She clarified that the Affiliation Agreement should be added as a separate article following the Membership section, defining the membership, outlining its benefits, and referencing the specific agreement.

Past President Garcia, Chair of Futures Committee, wanted to add for the record that in full disclosure even though IMASA is listed as a Bulk Membership they have not paid their dues and we have not heard from them for a few years.

Region III Director Mark Massey requested a copy of past minutes regarding Bulk Membership. ED Shalby stated that he would send them to the Board.

A report from the Membership/Mentoring Committee and Futures Committee will be providing recommendations regarding Bulk Membership Agreement at the May conference in Reno.

#### **Succession Plan for Executive Director**

Just for information that a request was made by a past Board Member at the Annual Business Meeting in St. Louis that we revisit the succession plan for review in May 2025. Some recommendations were made for outlining the specified instructions dependent on the amount of time away from the office.

### **Friday Board Letter Discussion**

Executive Director Shalby provided the history on the Friday Letter to the Board which was created to provide open communication with the Board in 2005. A year later the Foundation President was included in the communication for transparency as we had a large loan with them as well as a contract.

In 2014 the Past Presidents were included in the communication. The Foundation and Past Presidents letter did not contain any confidential information. This was not a Board directive and done solely as a means of open communication by Executive Director, Shalby.

ED Shalby noted that it has been his intention to resume sending the letter to the Past Presidents upon his return to the office full time.

President Abrahamson recapped that she is hearing that the Board is not opposed to the Past Presidents receiving the Friday Letter. However, they would like to have some time to disburse to the Past Presidents on a later date. ED Shalby suggested that he can distribute to the Board on Friday and then again on Tuesday to the Past President.

Final determination was to allow ED Shalby to continue doing what he is doing as a matter of goodwill, but if there is sensitive information he will remove that information from the letter as he has been doing from the start.

Region X Director Steph Palmateer requested to be excused from the meeting as he needs to leave for another appointment. President Abrahamson approved his early departure. 10:25am

### **Discussion Regarding Members' Attendance at Virtual Board Meetings**

President Abrahamson informed the Board that we hold two virtual meetings per year. August as well as another in March or April prior to the Annual Conference meeting in May. ED Shalby provided background on the justification of the past Board decision to keep the virtual meetings closed and not open to members to attend. At the time when we held our first virtual meeting we received complaints from Board members regarding us not asking for their consent to record the meeting. This consent would need to be given each time a meeting is to be held. The members would not be allowed to participate in the meetings and would only be allowed to view.

Region VI Director, Elena Hilby, motioned to make our virtual meetings only open to our members as participants to listen. *Motion withdrawn by Director Hilby for later discussion at the Mid Year meeting in November.*

### **Recap 2025 Annual Conference**

ED Shalby provided a brief recap of the 2025 Annual Conference. Conference is projected to be at a loss of \$120,000. This is due to the exorbitant cost of F&B and Audio Visual. Audio Visual alone has increased from \$40,000 in years past to over \$100,000. Attendance in St Louis was 720 delegates. While the attendance was excellent the expenses also increased causing the deficit. The projected loss is due to the following:

1. Food and Beverage Costs
2. Audio Visual

### 3. Planner Fees

Staff is currently reviewing some options to reduce costs for future conferences that will be presented at the Mid-Year meeting in November.

#### **Recap 2026 Annual Conference**

2026 conference will be held in Reno, NV. The host hotel is the Peppermill. Room rates are approximately \$150.00 per night. All meetings and education will be held under one roof. The Peppermill is offering a 10% commission that will be divided between IIMC and YES, our previous conference planner, with IIMC receiving 65% of the commission. Commissions from the Peppermill are \$53,000. This is 100% IIMC revenue. We have no meeting space cost in Reno and it is in close vicinity to one of our largest regions.

Discounts being offered in Reno are:

1. \$50.00 discount to first time and/or Region Discount for those from Region VIII
2. Academy sessions will be offered at \$159 each.
3. Complimentary membership to Nevada clerks that have never been a member of IIMC attending for the first time.

We are looking forward to 80<sup>th</sup> anniversary in Reno, Nevada. We will have more information for you at the Mid-Year conference in November.

President Abrahamson announced Budget Committee meeting dates September 19<sup>th</sup> and 20<sup>th</sup> at the Hilton Garden Inn in Ontario, CA.

#### **Adjournment**

With no further business, the meeting adjourned at 11:15 a.m. PDT.

Janet Pantaleon - Recorder

# INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Board of Directors  
**From:** Chris Shalby, Executive Director  
**Date:** October 1, 2025  
**Subject:** 2025 Executive Director Midyear Report

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## Overview

The following is an overview of Headquarters, Operations and Personnel. 2025 has been a productive year, with enhanced Education programs, increased engagement with members via social media, streamlined membership services, allowing more person-to-person contact, membership dues now being through email by members and a well-attended Annual Conference in St. Louis. **At the end of my report, I have three recommendations that requires Board approval. Management's other recommendations will be part of the Budget Committee report.**

## Staff

We have 10 full-time and one part-time staff. IIMC has three staff members working remotely – Nevada, Florida and Kentucky. The rest of staff continue to work a hybrid schedule at the Rancho Cucamonga, CA, headquarters. Our staff meetings are held virtually each Tuesday. Otherwise, the departments and I meet on an ongoing and as needed basis. All Departments are operating efficiently.

## Administration

Four staff members have been with the Organization for 20 or more years. Staff offers institutional history, knowledge, experience, a belief in IIMC's mission and an affinity toward the membership.

Janet Pantaleon is now the Office Manager and Human Resources Representative. She oversees most areas of Administration, Human Resources and building and tenant maintenance. She will provide backup to finance. Janet will continue to coordinate the Conference's Opening Ceremony. Marlena Hernandez is IIMC's Administrative Coordinator, providing service in many areas including accounts receivables on top of her administrative responsibilities. She will help Janet during the Opening Ceremony at the Annual Conference. Part-time staff Shannon Kane now oversees the Finance Department, including the monthly and quarterly budgets, works with our auditors and everything else in accounting.

In September 2019, we launched an affinity program -- **Windfall** – which provides members from Regions I - X with benefits regarding loyalty shopping programs. There is no revenue stream with this program. It is a value-added service for those members who wish to participate. Their full-page advertisement is published in the monthly *News Digest* and weekly E-briefings.

## 2025 ED Update – Page 2

### **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:** In 2025, we installed and repaired our air conditioning system, repaired the parking lot and provided maintenance where needed.

### **CONFERENCE – 5-Day Conference (full report is part of Budget Committee in this Agenda)**

#### **2026 Conference – Reno, Nevada**

We are projecting 720 Delegates/25 guests for the 2026 Conference and a projected deficit of (\$1,775). The average attendance numbers from Conferences in 2018, 2019, 2022 and 2023 is approximately 666 delegates. St. Louis attracted approximately 730 delegates. Reno is an attraction, with Lake Tahoe less than one hour away. Also, Region 8 East and West have approximately 1,370 members from which to draw.

A large turnout is not necessarily a guarantee in a positive bottom line. Costs continue to increase in the following areas: 1) speakers; food and beverage; and audio visual/technical support; and exhibit halls. Staff will look to find ways of reducing costs prior to and during the conference.

**NOTE: We recommended a \$50 increase to the Delegate registration fee for 2026. An E-vote was conducted from October 1 through 17 with a final tally of 19 – YES and 9 – NO. The increase has been added to the 2026 Conference Registration Fee.**

Airlift is available from anywhere in the world and it is approximately a 15-minute ride from the airport to the host hotel – complimentary shuttle to and from the Peppermill is available. We are in one hotel, the Peppermill which will house attendees and all education sessions, exhibit hall, general sessions, all-conference event, meals and refreshment breaks, Board meetings and annual business. Overflow hotel will be determined if the need arises;

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

The Peppermill Hotel -- \$150/night for single and double; with sales tax (13%) and 70% attrition. We have a total of 3,675 rooms contracted and will need 2,573 accumulative to avoid attrition.

**NOTE: We will block a group of rooms for the Board of Directors, but each Director will need to make his or her own arrangement regarding payments and finalizing his or her travel dates.**

### **Conference Delegate/Guest Registration Fees - 2026**

The current fees are \$750 early bird for Delegates and \$265 for Guests.

**Early Bird Package/Marketing**

**The Early Bird will be through Friday, March 13, 2026, to save \$50 on registration.**

- **After Early Bird** - March 14, 2026 – cost will be \$825. 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.

**Early Bird Package/Marketing for 2026 Conference**

- The preliminary program will be online in 2025;
- The Education program will be part of the online registration process. Delegates will choose their concurrent education sessions (tracks) prior to the conference;
- Hotel online reservations will be available to members in November/December 2025;
- The Conference Grant application period runs from September – November and recipients will need to be selected by the Board in early December; and
- We will promote this conference as an opportunity to earn 12 education points based on completing an assessment for each session attended.

**Rebates/Commissions Maximum**

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

**Total Commissions per occupied room block**

- Peppermill Hotel      \$53,825

**Areas to note for Reno include:**

- Food and beverage can exceed \$200,000 and there is no required minimum. In 2025, we spent more than \$300,000 in F&B.
- It is in a region with approximately 1,300 IIMC members and approximately 100 members in Nevada.
- There is no meeting space cost.

**Recommended Discounts and Savings**

We will offer a flat price (discount included) of \$460US to Region X (Canada). Region XI receives a discounted conference rate of \$395US.

- Academy sessions are \$159 each. Athenian Dialogues at \$110 per Dialogue.
- Offer a \$50 discount for a First Timer and Region VIII – East and West delegates.
- Offer a one-year complimentary membership to Nevada Clerks who have never been IIMC members and that are registering for the conference for the first time.

## **EDUCATION DEPARTMENT**

The Education Department continues to operate efficiently, has consistently met members' educational needs, and has stayed abreast of education guideline improvements, especially in our current environment. Dr. Rodriguez continues to facilitate and create IIMC's Education programs. She has successfully launched the Online Professional Development Program, which is entering its third year, along with the Education PLUS Program and fostered a partnership with the Leadership Development Academy. She has also refined the department's processes critical to certification and granting CMC and MMC designations, Association course reviews, and Institute Annual Reports.

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

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

### **The Education Department's report is part of the Agenda.**

#### **Finance (Full reports are in this Agenda)**

The 2025 Year End projected budget is anticipated to end with a profit of **\$7,871** This is a decrease from our initial projection of **\$65,715**.

Our Board Designated Reserves are invested with the firm of Urban Wealth Management – see attached Charles Schwab statements for month-end October 31, 2025, for reference.

**The 2025 and 2026 projected year-end budget reports with recommendations are in this Agenda as part of the financial update and provide detailed accounts of IIMC's finances.** The Budget Committee's report also provides recommendations regarding next year's finances.

#### **Marketing/Communications**

We continue to sell advertising in the online *News Digest* when possible and seek opportunities for advertisers to promote themselves in ways that also benefit IIMC members (e.g., webinars, articles). Advertising dollars for a magazine that is totally on-line results in bottom-line revenue.

Publishing an on-line *Digest* allows us the flexibility to negotiate advertising costs since IIMC does not incur any significant costs to produce (\$300/month for design) the E-zine.

Advertisers are also featured on the IIMC website in their respective sponsorship levels.

### **The Communications Report and the Live Broadcast Analyiss are in this Agenda.**

**Membership**

We are projecting membership numbers to be \$1,582,000 for 2026. Based on what we will realize for year-end 2025, we believe the 2026 membership projections, with an increase, are still conservative but attainable.

The department has taken measures to ensure continuity of IIMC's 14,980 membership base, primarily by concentrating on personal contact with members who are close to losing their membership, utilizing the IIMC education opportunities through Virtual Institutes and easy access to online learning and continuous promotion to recruit new members. We are acutely aware of budget constraints and we're using our monthly E-Briefings to promote IIMC services, member engagement, education and features. We are also employing the Board in recruiting efforts with the Region Director Challenge.

The Department has made more of a concerted effort to contact members via phone or email to help secure dues and make the members aware of the benefits of their membership. Janis Daudt, Tammy Storrie and Stephanie Galarza continue to be the main points of contact with our members.

**NOTE:** We will continue in 2026 with the Member Drive that we began in 2022, optimistic that we can build on the 500 plus new members acquired in the previous years.

**2025 Membership Dues**

In 2025, IIMC increased membership dues by \$10.00. IIMC Policy states that we are to present member dues increases to the IIMC Board every two years. Therefore, we are not recommending \$10.00 dues increase for 2026.

**The Member Services Report is in this Agenda.**

**Management's Comments/Recommendations -- Board Action Required**

Management's financial recommendations are based in the 2026 Financials with the Budget and Planning Committee report which was accepted during its meeting in September 2025.

**Management's Recommendation:**

1. Hiring a Region X Consultant – see attached
2. Reducing costs at Annual Conferences – see attached
3. Region X and XI Affiliate Agreements and Bulk Membership Scheme as part of the Constitution – see attached

NOTE: The Regions X and XI Affiliate Agreements and the Bulk Membership Scheme are not listed in IIMC's Constitution. We've been operating with signed Affiliations and unsigned Memorandums of Understanding for the Bulk Membership Schemes. Therefore, we recommend creating new amendments to reflect those relationships and to include a statement/description on bulk membership schemes. We also recommend that these amendments along with any other revisions to the Constitution be part of the overall review of the Constitution to be presented at the 2027 annual business meeting.

**INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS**

**To:** IIMC Budget & Planning Committee  
**From:** Chris Shalby, Executive Director  
**Date:** September 10, 2025  
**Subject:** Breakdown of Conference Costs

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IIMC's Annual Conference costs continue to increase with little or no room to negotiate hard costs, such as food and beverage, audio visual and tech support, exhibit hall fees and other miscellaneous areas. Below are the salient areas that affect our bottom line. Speaker costs can be negotiated per our budget. Although we have a required minimum in food and beverage, we have always met the minimum.

	2022 – Little Rock	2023 - Minneapolis	2024 - Calgary	2025 – STL Estimates
Coffee	\$45/5 Gallon	\$55/5 Gallon	\$55/5 Gallon	\$60/5 Gallon
Annual Banquet	\$24,887	\$54,284	\$46,387	\$76,730
Food & Beverage	\$139,213	\$319,296	\$232,065	\$318,000
Audio Visual	\$61,000	\$92,000	\$99,000	\$110,000
Exhibit Hall Fees	\$4,500	\$8,400	\$39,000	\$12,000
Whova APP	\$9,300	\$5,600	\$6,900	\$10,919

Producing an IIMC Conference is a year-round project for staff. Below are what IIMC charges a full-paying Delegate and what it costs to IIMC:

**Full paying Delegate Costs without discounts**

Total cost for an IIMC Delegate to attend a conference in 2025 = \$700. With the Discount Programs, it's fair to estimate that each Delegate paid approximately \$650. The cost of producing an IIMC Conference in 2025 was \$857.00 per person.

**Costs to IIMC to subsidize a Delegate**

Total costs to IIMC for a member to attend the 2025 conference = \$157.00 in addition to the \$700 EB fee.

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Board of Directors  
**From:** Chris Shalby, Executive Director  
**Date:** October 1, 2025  
**Subject:** 2026 and Future Conference Recommendations

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### Overview

Annual Conferences are IIMC's secondary source of revenue. Since 2022, IIMC's conferences, although popular and deliver a premier education program with enhanced networking events, have not delivered the revenue that we would anticipate with such an event.

Attendance hovers around 650 on average with exhibitors, Institute Directors, speakers, etc., the average is closer to 1,000.

And, yes, creating new revenue streams is always on the horizon, albeit it is somewhat vertical in what is offered: IIMC's Education Department continues to develop online courses that are attractive to members. Online courses in 2024 and 2025 have helped a positive bottom line. They are low in cost, popular and provide small rebates. Our major fundraiser – Annual Conferences – generates additional revenue from attendance, sponsors and exhibit programs.

Sponsorships brought in approximately \$100,000 in 2025. The IIMC Foundation receives 10% of all sponsorships (per the IIMC Foundation/IIMC service contract). Another 20% is slotted in Marketing toward News Digest advertising, leaving approximately 70% in the conference revenue budget.

The main concerns moving forward are the consolidations taking place with our Conference sponsors and the extraordinary high cost of doing business. We have seen food and beverage costs and audio visual/technical support continue to increase. We've already witnessed three sponsors who were with us in 2022, no longer in existence with mergers. The consolidations will hurt IIMC's sponsorship revenue since we could be dealing with fewer independent companies. We continue to be in constant negotiations with the existing sponsors, searching for new and creative ways to increase their contributions by providing them with flexible marketing opportunities. In 2025, we had 10 sponsors at our conference. Management has reached out to those 10 sponsors for 2026 and has received verbal commitments from all of them for either the same donations or slightly more. We have secured a new sponsor – Televic- for additional revenue for 2025 and the 2026 conferences.

There are methods to reduce expenses, and Management and the Budget and Planning Committee are recommending the following:

1. Eliminate Board development on Friday at the Annual Conference. Board Development should continue prior to the Midyear Board meetings. Eliminating Board Development prior to the Conference reduces IIMC's obligation to reimburse the Board for Thursday and Friday accommodations. It also reduces one full day of meals and audio-visual costs as well as facilitator costs.
2. Eliminate President's reception on Friday evening.

3. Access to Saturday evening's reception will be by ticket, which allows one complimentary drink for a Director and guest (if applicable). The same will be offered to Foundation Board members and International Guests.
4. Diversify food and beverage options for all meals.

At the 2025 Conference, IIMC spent approximately \$47,000 on Board accommodations, meals and receptions. This also includes funding the IIMC Foundation Donor reception and the International Reception.

#### Future Conferences - 2030

1. Explore the feasibility of holding an annual conference in one city consecutive years or every other year for a 3-year period. This may help with long-term negotiations, considering certain cities may be amenable to this arrangement since they can count on future income from IIMC conferences. If the Board agrees, we can provide a Draft at the May Board meeting of how this arrangement would work

These recommendations may seem extraordinary; however, given that we are dealing with a landscape that embellishes on business costs annually and a demographic that has cost inelasticity, it is time to explore new ways of doing business.



# International Institute of Municipal Clerks

Professionalism in Local Government through Education

## IIMC Region X Development Consultant Services

### **Project**

An independent consultant for the International Institute of Municipal Clerks regarding Region X – Canada

### **Scope**

The Region X Development Consultant will work closely with IIMC's Executive Director, Region X Directors, the IIMC Board, IIMC staff and the International Relations Committee. The consultant will work to increase Region X participation in IIMC and develop and deliver services to IIMC members particularly in the international community.

### **Objectives**

- Significantly grow membership of IIMC Region X;
- Generate regular communications between IIMC, Region X Directors and Region X members which supplements and complements the material provided by IIMC;
- Build relationships with national organizations within Region X
- Market IIMC, facilitate the uptake of IIMC membership within affiliates and among professionals at large;
- Research the creation of Institutes through Universities in Region X
- Create and publish a regular Region X E-journal (Region X Newsletter).
- Provide information to update the Region X pages of the website;
- Commission and create additional value-added products and services for members;
- Facilitate the participation of increasing numbers of Region X members in IIMC annual conference;
- Brief IIMC officers on developments within Region X.
- Liaise with IIMC to support the central evolution and development of IIMC services for all members;
- Support IIMC education staff regarding new education initiatives in Region X; and
- Undertake any other appropriate activities as required.

### **Terms**

The role is home based (Canada).. This is a consultant's position (12 months) that reports to IIMC's Executive Director.

Consultant will receive a stipend of \$5,00.00US/annually and will be reimbursed for working materials and expenses for any pre-approved travel.

- **Contract duration: Open with either party to provide 30-day written notice if they wish to terminate this contract.**

Chris Shalby  
International Institute of Municipal Clerks

## Chapter 2.400

### INDEPENDENT CONSULTANTS/CONTRACTORS

Sections:

2.400.010	Purpose
2.400.020	Scope
2.400.030	Policy

#### **2.400.010      Purpose**

To establish purpose, appointment process, terms and scope of work for IIMC independent consultants/contractors (**May 20, 2017**).

#### **2.400.020      Scope**

Executive Director

#### **2.400.030      Policy**

Independent Consultants/Contractors:

For purposes of this policy, independent consultants/contractors are defined as individuals hired by IIMC to provide either on-going or one-time services in their respective fields. These individuals work with the Executive Director and IIMC staff to carry out specific IIMC responsibilities that are not assigned to IIMC staff. These responsibilities entail and are not limited to education, conference, finances, marketing and communications.

#### **Appointment Process, Term and Payment:**

The Executive Director will provide the Board with a report for the need to hire an individual consultant/contractor. The report will include the costs/stipends/travel associated for services and the overall responsibilities. Depending on the nature of the task, the term and continuation of work shall be at the discretion of the Executive Director.

#### **Recruitment**

With the Board's support, the Executive Director is responsible for recruiting and hiring independent consultants/contractors.

#### **Scope of Work**

Depending on the position and the area of expertise, specific objectives will be created by the Executive Director for each required area.



## Memorandum of Understanding

This agreement made this 23rd<sup>th</sup> day of October 2009, between the International Institute of Municipal Clerks (IIMC), and the Society of Local Council Clerks (SLCC).

Whereas IIMC and SLCC are desirous of developing a partnership for the mutual promotion and benefit of each organization;

AND WHEREAS IIMC and SLCC share a common goal of promoting the professionalism of their members;

### THE PARTIES HERETO AGREE AS FOLLOWS:

1. IIMC and SLCC hereby enter into a formal agreement from the date of signing hereof.
2. IIMC and SLCC shall extend an annual reciprocal invitation for up to two members to attend their respective annual conferences. Said invitation will include:
  - a. Complimentary registration and accommodations for the duration of the Annual Conference;
  - b. The opportunity to conduct education related sessions, and/or address the full membership at general functions or events.
3. IIMC and SLCC agree to place an active link on their respective web sites: [www.iimc.com](http://www.iimc.com) and [www.slcc.co.uk](http://www.slcc.co.uk) to announce this memorandum of understanding.
4. IIMC and SLCC agree to reciprocate receiving regular newsletters and publications
5. IIMC agrees to recognize SLCC as an official affiliate of IIMC on the IIMC web site and in the *IIMC News Digest*. SLCC agrees to recognize IIMC as an official affiliate on the SLCC website and in the publication *The Clerk*.
6. IIMC and SLCC agree to identify programmatic opportunities that are in keeping with the overall goals of each organization.
7. SLCC members may join IIMC for the affiliation Region XI cost, allowing qualified members participation in IIMC and Municipal Clerks Education Foundation (MCEF) education programs, scholarships, grants and other opportunities.
8. Either party may terminate this agreement with six months written notice.

International Institute of Municipal Clerks

A handwritten signature of Mary Lynne Stratta.

Mary Lynne Stratta, MMC  
President

A handwritten signature of Christian G. Shalby.

Christian G. Shalby  
Executive Director

Society of Local Council Clerks

A handwritten signature of Samantha Shippen.

Samantha Shippen  
Chairman

A handwritten signature of Nick Randle.

Nick Randle  
Chief Executive Officer



# International Institute of Municipal Clerks

Professionalism in Local Government through Education

## Memorandum Of Understanding – Region XI Bulk Membership Scheme

### IIMC Board of Directors Approves a Flat Fee of \$2,000US

1. IIMC agrees to appoint the **Society of Local Council Clerks** as its agent for providing IIMC memberships to its members in the United Kingdom.
2. Under this IIMC Board of Directors approved bulk membership scheme, the unit subscription cost for SLCC members to join IIMC is lower than the direct cost for members in IIMC Region XI.
3. IIMC agrees to provide an excel registration template to SLCC to register members.
4. SLCC's membership administrator will register the members and remit the fee to IIMC. They will provide IIMC with member's registration details so that they can be added to the membership database.
5. SLCC agrees to pay a flat rate of \$2,000US for as many members to join IIMC (current members will be included). SLCC may choose to collect this cost from its members or choose to provide IIMC membership as a benefit of being a member of SLCC.
6. IIMC will ensure that members recruited through this scheme receive website access, the monthly online News Digest magazine, online education courses, study abroad programs, weekly E-Briefings, E-membership packet, the Region XI newsletter and all other available IIMC benefits.
7. IIMC undertakes to give 6 months notices of any changes to the scheme or any decision to terminate it.
8. SLCC undertakes to give 6 months notice of withdrawal from the scheme.

Vincent Buttiglieri, MMC  
IIMC President

Chris Shalby  
IIMC Executive Director

Tom Van Der Hoven  
IIMC International Development Consultant

# A DECLARATION OF ASSOCIATION



The International Institute of Municipal Clerks

and

the Vereniging van Griffiers (Association of Griffiers)

## Herewith declare the following:

That as of October 16, 2009, the Vereniging van Griffiers (VvG) will become  
Associated with The International Institute of Municipal Clerks (IIMC)

## The purposes of this association are:

TO COLLABORATE in furthering the professionalism of raadsgriffiers/Municipal Clerks and similar  
positions worldwide.  
29

TO CONFER regularly and exchange information and knowledge relevant to the profession.

TO FOSTER communication, mutual understanding, and respect between the two Organizations and  
their members.

TO PROMOTE personal involvement in IIMC and its mission, and the international exchange of ideas  
and programs of benefit to the raadsgriffiers/Municipal Clerks profession.

Signed on October 16, 2009 in the City of The Hague, The Netherlands

International Institute of Municipal Clerks

Mary Lynne Stratta, MMC  
President

Christian G. Shalby  
Executive Director

Vereniging van Griffiers

Edwin Israel  
Secretary

Vereniging van Griffiers

Het International Institute of Municipal Clerks  
en  
de Vereniging van Griffiers

## Verklaren hierbij het volgende:

Dat de vereniging van Griffiers (VvG) met ingang van 16 oktober 2009 is geassocieerd met het  
International Institute of Municipal Clerks (IIMC).

## De doelen van deze associatie zijn:

OM SAMEN TE WERKEN bij het wereldwijd bevorderen van de professionaliteit van  
raadsgriffiers/municipal clerks en daarmee te vergelijken functies.

Om regelmatig informatie en kennis TE VERSTREKKEN EN UIT TE WISSELEN, welke voor de  
beroeps groep van betekenis is.

Om communicatie, wederzijds begrip en respect AAN TE MOEDIGEN tussen de twee organisaties en  
hun leden.

Om de persoonlijke betrokkenheid bij het IIMC en haar missie TE BEVORDEREN, evenals de  
internationale uitwisseling van ideeën en programma's die van nut zijn voor het beroep van  
raadsgriffier/municipal clerk.

Getekend op 16 oktober 2009 te 's-Gravenhage, Nederland

International Institute of Municipal Clerks

Mary Lynne Stratta, MMC  
Voorzitter  
  
Christian G. Shalby  
Directeur

Vereniging van Griffiers

Edwin Israel  
vice-voorzitter  
Secretaris

# A DECLARATION OF ASSOCIATION



The International Institute of Municipal Clerks  
and  
Association of Democratic Services Officers



Association of  
Democratic  
Services Officers

**Herewith declare the following:**

That as of the 23 March 2010, the Association of Democratic Service Officers (ADSO) will become Associated with The International Institute of Municipal Clerks (IIMC)

**The purposes of this association are:**

TO COLLABORATE in furthering the professionalism of Municipal Clerks and similar positions worldwide.

TO CONFER regularly and exchange information and knowledge relevant to the profession.

TO FOSTER communication, mutual understanding, and respect between the Organizations and their members.

TO PROMOTE personal involvement in IIMC and its mission, and the international exchange of ideas and programs of benefit to the Municipal Clerks profession.

Witnessed this 23<sup>rd</sup> day of March 2010 in the City of London, England

**International Institute of Municipal Clerks**

A handwritten signature of Mary Lynne Stratta.

Mary Lynne Stratta, MMC  
President

A handwritten signature of Christian G. Shalby.

Christian G. Shalby  
Executive Director

**Association of Democratic Services Officers**

A handwritten signature of John Austin.

John Austin  
ADSO Chairman



## Memorandum of Understanding

This agreement made this 22 day of May 2012, between the International Institute of Municipal Clerks (IIMC), and the Association of Municipal Managers, Clerks and Treasurers of Ontario (AMCTO).

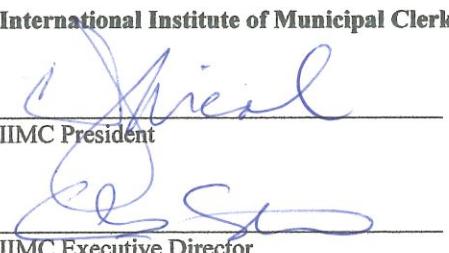
Whereas IIMC and AMCTO are desirous of developing a partnership for the mutual promotion and benefit of each organization;

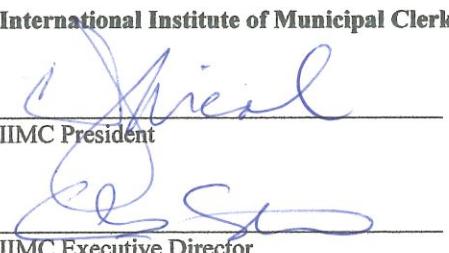
AND WHEREAS IIMC and AMCTO share a common goal of promoting the professionalism of their members;

### THE PARTIES HERETO AGREE AS FOLLOWS:

1. IIMC and AMCTO hereby enter into a formal agreement from the date of signing hereof.
2. IIMC and AMCTO shall extend an annual reciprocal invitation for up to two Board of Directors and/or Staff members to attend their respective annual conferences. Said invitation will include:
  - a. Complimentary registration and accommodations for the duration of the Annual Conference;
  - b. The opportunity to conduct one education related or Association information session.
3. IIMC and AMCTO agree to place an active link on their respective web sites: [www.iimc.com](http://www.iimc.com) and [www.amcto.com](http://www.amcto.com) to announce this memorandum of understanding.
4. IIMC and AMCTO agree to reciprocate receiving regular newsletters and publications.
5. IIMC agrees to recognize AMCTO as an official affiliate of IIMC on the IIMC web site and in the *IIMC News Digest*. AMCTO agrees to recognize IIMC as an official affiliate on the AMCTO website and in the *AMCTO Municipal Monitor*.
6. IIMC and AMCTO agree to identify and explore programmatic partnership opportunities that are in keeping with the overall goals of each organization.
7. Eligible AMCTO members who are not already IIMC members as of the date of this Agreement may join IIMC for the first year at 50% of the applicable IIMC Region X membership rate, allowing qualified members participation in IIMC and Municipal Clerks Education Foundation (MCEF) education programs, scholarships, grants and other opportunities.
8. Eligible IIMC members who are not already AMCTO members as of the date of this Agreement may join AMCTO for the first year at 50% of the applicable AMCTO membership rate, allowing qualified members participation in AMCTO education programs, and other opportunities.
9. IIMC and AMCTO agree to promote the reciprocal membership opportunities set out above to their respective memberships. In exchange for such promotion activities, IIMC will remit to AMCTO and AMCTO will remit to IIMC the sum of \$25.00 for each new member that joins each respective organization under this program.
10. Either party may terminate this agreement with six months written notice.

International Institute of Municipal Clerks

  
IIMC President

  
IIMC Executive Director

Association of Municipal Managers, Clerks and  
Treasurers of Ontario

  
AMCTO President

  
AMCTO Executive Director

## ARTICLE XV Amendments to the Constitution

### Section 1. Proposed amendments

Proposed amendments to the constitution shall be made in writing, setting forth the particular change or changes proposed and shall be filed with the Executive Director.

### Section 2. Membership Notice and Consideration

When filed in accordance with Section 1, the proposed amendment shall be submitted to the membership when filed under the following procedures:

- A. It is determined that if the proposed amendment is adopted, it will not have a negative impact on the Organization, or its finances, as determined by the Board.
- B. A copy of the proposed amendment, authors' names, intent and explanation are filed by February 1 in time to be published in the *March News Digest*.
- C. The proposed amendment's merit is discussed and evaluated with the attendees at the Annual Business Meeting.

### Section 3. Membership Vote

If the proposed amendment is approved by majority vote at the Annual Business Meeting, the proposed amendment will be distributed for a vote by the entire membership. Members will have forty-five (45) days following the Annual Business Meeting to vote on the proposed amendment.

The constitutional amendment shall be adopted if two thirds of the votes cast are in favor of the proposal. The effective date of the amendment will be the 46<sup>th</sup> day following the Annual Business Meeting, unless otherwise specified.

**IIMC Strategic Outline**  
**Summary Performance & Process Objectives**  
**IIMC 2024-2026**

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

**Key Result Area 1 – Image – Internal/External**

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**Performance Objective:**

- Through December 31, 2025, the members' perception of the Board will change from one of elitist to an inclusive Board. IIMC members will indicate that they believe and experience IIMC as an inclusive and diverse Organization that meets and/or exceeds the needs of the individual member. **UPDATE: We have experimented with several events (Banquet seating on stage and VIP dinner) during the conference to alleviate members' perceptions regarding the Board and inclusivity, however, we're unsure as to how this is measured.**

**Process Objectives:**

- **Objective 1** – Ongoing – Through the use of Social Media, news releases, uniformed correspondence, and professional trainers to provide the Board with the tools to encourage them to speak about their profession. **UPDATE: We have produced news releases and our social media is directed by our Communications Director Karen Lee, who has worked with various Region Directors to broadcast the Board's messages.**
- **Objective 2** – Ongoing – Continue to find new methods of enhancing internal structures that will aid IIMC members in serving on Committees and the Board. **UPDATE: The creation of the Futures Group and the IDEAL Committee has provided IIMC with opportunities to select IIMC members who have rarely, if ever, been involved with the Organization. These two Ad Hoc Committees are working on objectives that will have long-range influence on IIMC.**
- **Objective 3** – Ongoing – Produce ways of Board members to recruit members and interact with colleagues, showing that IIMC is an inclusive Organization. **UPDATE: See #2**
- **Objective 4** - Form a committee to review action and procedures to obtain goals so that IIMC's success can be measured. Send out new survey 2025. **UPDATE: We are not sure what this objective entails, since the only committee is the Board who has the ability to review its own actions.**

**Responsibility** – IIMC Board of Directors and Staff

**Present Outcome:** E-briefings keep IIMC's DEI declaration in front of its members.

## **Key Result Area 2 – Communications – Internal/External**

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### **Performance Objective:**

- Ongoing – IIMC presents for Board approval an Online Community/Social Media/Marketing plan that will improve the perception of the Clerk’s value within the municipalities and one that markets IIMC’s value to new, potential and current members, councils and mayors.

### **Process Objectives:**

- **Objective 1** – Integrate the IIMC Brand that encompasses the Clerk’s profession as professional and as a vital career.

### **IIMC Board Strategic Plan – Page 2**

- **Objective 2** – Ongoing - Continue to incorporate the IIMC Brand to support IIMC members, Region Directors, member services, and the IIMC online educational programs.

### **Performance Objective:**

- Design a Region Page for each region that is kept active and updated to contain current information readily available to members.
- Region Directors responsible to keep social media page active and updated.
- Region Directors need to understand roles and goals in social media and member communication

**Responsibility** -- Executive Director/Communications/Staff & PR/MKT Committee.

## **Key Result Area 3 – Organization and Management**

### **Performance Objective:**

- Ongoing – The Board of Directors governs IIMC in an understandable, transparent, rational and effective way, compliant and adhering to established financial and governance policies and the Constitution.

### **Process Objectives:**

- **Objective 1** – Ongoing -- develop inclusive director recruitment protocols, within the Regions, that the Board believes will attract qualified candidates.
- **Objective 2** – Ongoing – provide continued education and training to develop the Board of Directors in the application of their roles and responsibilities.
- **Objective 3** – By December 2025, develop a plan for financial support of advanced Regional Director leadership development for incoming Board.
- **Objective 4** – By December 2025, create a Board succession planning process, ensuring a successful transition for outgoing and incoming Board members.

- **Objective 5** – Ongoing - with the Membership Department's involvement, finalize an outreach marketing plan to attract more Region X members, aiming to increase current membership to 500 plus in this Region.
- **Objective 5A** – By December 2026, fully develop and implement marketing plan to attract more Region X members to increase current membership numbers.

**Responsibility** -- Board of Directors/Executive Director

#### **Key Result Area 4 – Education**

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##### **Performance Objective:**

- Ongoing -- IIMC members will indicate that they believe the educational activities and opportunities offered by IIMC meet and/or exceed the needs of the individual member, and the Municipal Clerk profession. **UPDATE: With the addition of the EPP program, members can receive recognition for their continuing education and dedication to the profession, exceeding the requirements beyond the MMC designation.**
- Ongoing – Create new platforms for learning, taking into consideration IIMC's diverse members to include both face-to-face learning and online programs. **UPDATE: The Education Department recently (August 2025) launched the TopClass Learning Management System (LMS), which is IIMC's own platform for all IIMC education products. The platform is secure for all members, offering a single sign-on feature that directs them to their own portal to track all consumed education, including EPP, IIMC online education, future online education products, and future certifications.**

Ongoing – Continue to explore professional leadership opportunities, nuts and bolts and soft skills courses together with the Education and Professional Development Committee for possible addition to the IIMC website. **UPDATE: In 2025, the Education Department added three exciting new categories to our education portfolio: Police Records Management, City Records & Retention, and Digital Government. The IIMC Online Professional Development Program has 25 new courses scheduled for 2026.**

##### **Process Objectives:**

- **Objective 1** – Ongoing - Research and increase on-line learning education opportunities that are identified by members as adding value to their membership. **UPDATE: The IIMC Online Professional Development Program has 25 new courses scheduled for 2026. Dr. Rodriguez is researching new categories to add to the education portfolio. SHRM and Notary Public.**

**Responsibility** – Education Department/Board of Directors/Professional Development Committee

## Key Result Area 5 – Membership

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### Performance Objective:

- Ongoing - IIMC will retain and maintain a membership base of at least 15,000 or more members. **UPDATE: Currently, IIMC has a membership base of 15,000 plus members, of which 5,000 are part of the Region XI Bulk Membership. As the Futures Group reviews the Bulk program, Member Services will continue to process members from Region XI.**
- IIMC will look to increase its membership by 5% annually through new members. **UPDATE: The Department continues to use the perpetual member drive to increase membership.**
- By December 31, 2025 - IIMC will work to grow Region X membership to 500 members. **UPDATE: As part of the 2024 Calgary Conference promotion, IIMC provide one year's complimentary membership to first-time attendees who have never been IIMC members. That list has dwindled with nearly all members under this promotion have canceled their membership. We are looking at hiring a Region X independent consultant in 2026 to help review how to attract IIMC members in this Region.**
- **By December 31, 2025 - IIMC will have an** upgraded member only section with self-serving access to be phased in incrementally. **UPDATE: The Department has initiated the process (October) of sending members their dues renewal notices via email, allowing them to pay their dues directly through their membership accounts. This began for the dues cycle for December 31, 2025.**
- Responsibility -- Member Services Department/IIMC Board of Directors

## Key Result Area 6 – Finance

### Performance Objective:

- Ongoing - IIMC will maintain a Board Designated Reserves of no less than \$1 million or 6-9 months operating expenses. **UPDATE: We have more than \$1 million in Board designated reserves. The investment continues to gain interest. The investment is monitored by Urban Wealth Management and staff in regards to future investments, per IIMC policy.**
- Ongoing – Continue to explore and acquire additional revenue sources to maintain a financially healthy Organization. **UPDATE: We have had success in additional revenue through the Education Department's online courses. Our Conferences, which should generate extra revenue, will need a thorough review as to how that can be accomplished.**

### Process Objectives:

- **Objective 1 - Ongoing – continue to be vigilant with IIMC budget policies, working with the Budget and Planning Committee, the Board and staff to ascertain that fiscal policies are being followed. UPDATE: Yes, we are cognizant and remain vigilant for all things financial. Our cash flow is monitored weekly and our AR and AP are timely.**

**Responsibility** - Executive Director, Executive Committee, Board of Directors, Staff and Budget and Planning Committee

### **Key Result Area 7 – Conference**

#### **Performance Objective:**

- Ongoing -- To better know the upcoming conference city, the possibility of holding a Mid-Year meeting at one of the upcoming awarded conference cities may help with future proposals regarding attrition and expenses. UPDATE: We began this process last year in St. Louis by holding the 2024 Board midyear meeting in the same city as a future conference (2025). We will continue this objective going into the 2026 midyear for the 2027 Conference and the 2027 midyear for the 2028 conference. IIMC policy states that every three years, the Board midyear meeting needs to be held at IIMC HQ.
- Ongoing -- IIMC to explore conference sponsorship opportunities to reduce conference expenses. UPDATE: This is ongoing and for the 2026 Conference, we have acquired a new sponsor.
- By December 31, 2025 - Explore a virtual conference alternative for those who cannot attend the in-person conference recognizing the contracts currently in place. UPDATE: We have not explored this option and will need more time. We need to explore our current virtual online courses and ascertain that they do not conflict with a virtual conference as well as our own annual in-person conferences. We looked into this during Covid-19 and did not find many members that were interested. We are also concerned that IIMC wouldn't recoup its costs of producing a virtual conference since the investment in resources is similar to the an in-person conference.
- By December 31, 2025 - Develop a plan to increase conference attendance with incentives or other means. UPDATE: We continue to provide discounts for first-timers and members from the Region. We also provide one year's complimentary membership for individuals in the state where the conference is held.

**Process Objectives:** Ongoing – increase sponsorship revenue, keeping in mind consolidation of current companies, evaluate how conference events are utilized, create incentives to attract new and maintain current attendees.

**Responsibility** – Executive Director/Staff/Conference Host Committee/Conference Planning Committee

# 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:** October 10, 2025

**Subject:** Education Department Midyear Report - 2025

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Below is an overview of the Education Department's operations since the Annual Board Meeting held in May 2025.

## 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 **5/15/2025 and 10/8/2025**

REGION	CMCs Awarded	MMCs Awarded	Total Active CMCs YTD	Total Active MMCs YTD	Total Active Members
Region I	17	6	339	106	699
Region II	3	5	268	101	599
Region III	28	9	969	319	1820
Region IV	10	4	300	114	663
Region V	18	9	430	141	940
Region VI	6	3	198	58	518
Region VII	11	6	333	108	817
Region VIII East	13	3	334	87	745
Region VIII West	14	8	323	127	624
Region IX	49	1	1002	310	1873
Region X	2	1	79	14	198
Region XI	0	0	57	15	72

## Athenian Leadership Society

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

Year	<u>Athenian Dialogues Held</u>	<u>Fellows Awarded</u>
2023	83	39
2024	105	53
2025	57 as of 4/2/2025	
2025	50 since 4/2/2025	11

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.

### **Proposal Submitted to the Education and Professional Development Committee**

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.

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 both 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.

### **Progress Since the Prior Update**

- **Phase 3 (Launched):** A targeted survey has been sent to the current **Association Presidents** in IIMC's database to capture organizational perspectives on the certification framework and its operational impacts. Responses are being collected and will be analyzed alongside the candidate survey data.
- **Next Phase (Planned):** The subsequent survey will be distributed to our **Institute Directors** to gather program administration and curriculum-alignment perspectives relevant to any future framework recommendations.

*Next steps include continuing analysis of all collected data and synthesizing findings for the Education and Professional Development Committee's review, prior to any formal recommendations to the Board.*

### **2026 IIMC Conference in Reno, Nevada**

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#### **Conference Update**

We are thrilled to announce that the **2026 IIMC Annual Conference** will be held at the **Peppermill in Reno, Nevada**—and it's our most ambitious educational program yet. In response to prior feedback, we're leveraging an **extra day of education** to deliver a **robust, packed schedule** of sessions throughout the conference. Highlights include an **open Certification Q&A** for all attendees, a **session designed and delivered by Region XI**, a **Large Cities Forum**, and a **Q&A with IIMC Executive Director Chris Shalby and President Dawn Abrahamson**. Our goal is to provide a high-energy, deeply relevant learning experience that meets members where they are and advances the profession together.

## **Conference Content:**

The 2026 Reno Conference program includes:

- 8 Academy sessions (pre-conference)
- 4 Athenian Dialogues (pre-conference)
- 2 General sessions (conference)
- 8 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.**

## **Registration:**

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

## **Tracks:**

Each track offers identical, 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 2026 speaker lineup includes academy instructors, Athenian dialogue facilitators, keynote speakers, and session presenters—each bringing their own dynamic perspective to public service and leadership development.

## **Conference App:**

We are once again using the **Whova app**, which was 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 expanded my presence across several key municipal clerk associations nationwide. On **January 24, 2025**, I delivered the keynote address for the **Virginia Municipal Clerks Association**, titled "*The Triple Path of Leadership: Lead, Follow, Serve.*"

Throughout the year, I contributed to IIMC Municipal Clerk education across the country, including:

- **May 18, 2025 — Taught** an Academy session at the **IIMC Annual Conference**: “*Not Re-Inventing but Re-Imagining the Wheel: ChatGPT for Local Government.*”
- **June 20, 2025 — Presented** the same session for the **Northwest Clerks Institute**.
- **July 14, 2025 — Taught** “*Courageous Leadership for Municipal Clerks*” at the **Ohio Municipal Clerks Association Conference**.
- **August 19, 2025 — Led** “*Aligning Mind, Body, and Spirit for Authentic Leadership in Local Government*” at the **Wisconsin Municipal Clerks Association Conference**.
- **September 2025 — Facilitated** an 8-hour **Region VII** workshop: “*Building and Cultivating Stronger Relationships in Local Government*” and “*Maintaining Mental Health and Wellness.*”
- **October 2025 — Taught** a 4-hour workshop on ChatGPT for Municipal Clerks and **Hosted** an in-person **Certification Q&A** 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

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

**Delaware – Joy Jordan**  
**Arizona – Michelle Hill**  
**New México Rebecca Martinez –**  
**Kansas – Jamie Buster**  
**Missouri – Dr. Karen Goodwin**

## **Course Review Process**

Course reviews continue to be robust, 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. The Department continues to work on guiding new leaders through the process.

**2025 Online Professional Development Program** – This program, now in its fourth and final quarter of the year, remains highly successful. If members cannot attend the live session, they can participate in our online asynchronous program via Captus Press under ‘Online Learning Opportunities’. The Education Department is pleased to announce that 25 new online courses are scheduled for 2026. Iris Hill remains a pillar in this area while she manages the entire program from beginning to end in conjunction with working closely with Dr. Rodriguez in the Education PLUS Program (EPP).

**Education P.L.U.S. Program** – This program was successfully launched in July 2023, and new resources continue to be available on the IIMC website. July 31, 2025, marked the completion of the first cohort’s participation in EPP. The Education team received 45 successful submissions from 75 participants. 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. Again, Iris Hill has consistently taken the initiative to learn the components of this program and the new TopClass platform Learning Management System (LMS). Her learner’s attitude keeps her informed about department issues and at the heart of our department.

**EPP Mentorship Circle** — Dr Rodriguez identified five strong leaders to volunteer their time and assistance to create the EPP Mentorship Circle. They are Kathy Montejo, Alice Holloway, Kathy Walker, Tracy Borst and Shawn Campbell. The Mentors directly impacted the success of participants in submitting their EPP documentation for evaluation successfully. The Education Department wishes to recognize them for their service to their colleagues and to IIMC in pursuit of excellence.

**Institute Director Liaison** – Tanner Vario, Institute Director from Southern Utah University, remains very active in participating in meetings with the Education and Professional Development Committee, bringing the Institute Directors’ perspective, comments, and feedback. He is also working very closely with Dr Rodriguez on the IIMC Institute Director’s monthly newsletter and the Education Summit agenda for the Reno Conference in May 2026.

## **Committee Work**

**Education and Professional Development Committee** – The Education and Professional Development (EPD) Committee members met on July 21, 2025, and continue to meet quarterly. Dr Rodriguez wishes to commend Joelle Fockler, Committee Chair and Karen Mowad, Vice Chair, for their leadership in this area and for keeping the IIMC Education Department informed of their topics and feedback. Please refer to their report further.

### **Management Comments:**

The report is extremely detailed, encompassing all topics related to Education and speaks for itself. One point to note: With the flux in Institutes and Institute Directors, IIMC continues to work with its current group of educators, ensuring them of their value to IIMC members and professional development. There is a growing concern that Institutes are being eliminated due to various reasons.

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Board of Directors  
**From:** Shari Moore, MMC , Chair, Conference  
**Date:** September 25, 2025  
**Subject:** Conference Midyear Report - 2025

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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.

### Discussion:

The IIMC Conference Committee met by Teams on July 29th. There were over 200 proposals for the committee to consider. We provided a spreadsheet of all the speakers with the number of votes each received from committee members so that the IIMC education staff could see which speakers were the most popular, rather than narrow the list down.

The committee will be meeting this fall to review the 2029 conference choices and make a recommendation to the IIMC Board of Directors.

### Financial: N/A

**Summary:** President Abrahamson relayed an outline of goals and objectives for the upcoming year:

1. Evaluate and review the proposed educational sessions of the Annual Conference collaborating with IIMC's Education Department to ensure that the varying levels of education, experience, and job responsibilities of all IIMC members are being met. Forward any recommendations to the Education Department as needed. *This was completed in July.*
2. Recommend Annual Conference education topics and presenters to the Education Department by July 1, 2025. *The timing of this task may need to be moved in the future, as noted by last year's Conference Committee Chair.*
3. Work with the Executive Director to review future conference submissions and provide information to the Board of Directors. *We are expecting to receive the submissions sometime soon after this report is submitted to give our recommendation to the IIMC Board of Directors in time for the November mid-year meeting.*
4. Working with staff, review and revise the current Conference Planning Manual, ensuring it coincides with today's conference planning, fundraising and logistics. *The Committee will review the manual when staff is ready for us to take on this task.*

### Management's Comments:

Nice work as always by this Committee. The 2029 Conference site selection report has been postponed until the May 2026 Conference. The Conference Planning Manual Ad Hoc Committee's report is attached. We thank the Committee for its input regarding Conference speakers and topics.

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Board of Directors

**From:** Joelle Fockler, Chair, Education and Professional Development Committee

**Date:** September 26, 2025

**Subject:** **Education & Professional Development Midyear Report - 2025**

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**Background:** The Education and Professional Development Committee understands IIMC staff's expectations for the Committee for the 2025/26 year are to review information brought to the Committee for feedback and assistance with:

- Recommendations for dynamic keynote speakers for future IIMC Conferences with Clerk specific experience; and
- Ideas for training that IIMC can provide that are unmet needs.

**Discussion:** The IIMC Education and Professional Development Committee developed the following list of potential future trainings:

- Liquor and Marijuana Licensing Inspections
- Matt Lehman, From Conflict to Conversation (keynote speaker)
- Election Certification – like CMC or MMC
- Artificial Intelligence
- Boards and Commissions
- New Councilmember/Mayor Orientation and Onboarding
- Train the Trainer
- Mentor/Coach Training
- Athenian Dialogue Facilitator Stephanie Smith
- Leadership Training/Keynote Speaker Daniel A. Rosemond, former City Manager, 30 years in local government, author of *Death of a Public Servant*
- Records Management & Retention – Matt Daughtry, SML, Inc.
- Roundtable of Clerks from different US and International Affiliates

**Financial:** There is no financial impact.

**Summary:** The list of potential trainings was sent to IIMC staff, and the Committee will meet quarterly unless IIMC staff introduces something for feedback and comment.

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

We appreciate the Committee's input on all things related to IIMC Certification and Education.

# INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Board of Directors  
**From:** Lisa Garcia, MMC, Co-Chair, Futures Group  
**Date:** October 24, 2025  
**Subject:** **Futures Group Midyear Report - 2025**

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## Background

**Reporting Period:** June 1 – November 2025

**Submitted by:** Lisa Garcia Co-Chair on behalf of the members of the Futures Group

## I. Introduction

The IIMC Futures Group was established to evaluate long-term organizational sustainability, membership value, and the evolving role of the Municipal Clerk in a rapidly changing global landscape. Since June 30, 2025, the group has made significant progress in reviewing core membership structures, exploring international engagement, and developing models to strengthen IIMC's business framework for the next decade.

The Futures Group continues to serve as an incubator for innovative ideas that align with IIMC's mission while ensuring the organization remains relevant, inclusive, and financially sound.

## II. Accomplishments Since June 30, 2025

### 1. Membership Type Review and Redesign

- Conducted a comprehensive review of all membership categories, incorporating global representation and clarity of qualification standards.
- Developed a revised Membership Type Framework that simplifies classifications, reinforces professional standards, and eliminates ambiguity regarding Clerk responsibilities.
- Integrated feedback from every Futures Group member to ensure the framework protects the professional integrity of the Municipal Clerk while providing equitable access to membership worldwide.

### 2. Bulk Membership Evaluation

- Completed a comparative analysis of current and past bulk membership agreements to assess both financial and operational impacts.
- Drafted a discussion model for bulk membership using a business-oriented framework that balances value creation with sustainability.
- Reframed the conversation from a transactional membership approach to a value-added model, emphasizing member engagement, education, and professional recognition.

### 3 Collaboration and Communication

- Engaged in multiple work sessions and document reviews between July and October to align concepts on working drafts.
- Distributed discussion materials to the Futures Group, including:
  - Revised Membership Type Concept
  - Bulk Membership Model and Value Framework
  - Polco Survey and Results of survey from members of the Futures Group

- Maintained strong team participation, flexibility, and ongoing correspondence despite time zone challenges and professional workloads.

### **III. Summary**

The Futures Group has remained highly productive and collaborative since June 30. Through collective expertise and constructive dialogue, the group has helped shape foundational changes that will guide IIMC's evolution.

Our work reflects the organization's ongoing commitment to innovation, professional excellence, and inclusive representation of Clerks worldwide. As we move into 2026, the Futures Group will continue to deliver actionable recommendations that honor IIMC's traditions while preparing for its next generation of members. I am very proud to be working with such a talented group.

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

When this Group was created, there was no timeline provided to complete the work encompassed multiple areas of IIMC's membership and future objectives. The Group will meet in person at the Conference in Reno to further their work.

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

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

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

**Date:** **10/28/2025**

**Subject:** **IDEAL Task Force Midyear Report - 2025**

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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 **IDEAL** Committee met on July 8, 2025 virtually. The meeting was very engaging as all members who attended the IIMC annual conference provided input on future conference considerations of the following:

- Having assessable mobile scooters
- Noise sensitivity—some sessions were louder than others
  - Providing a disclaimer that session may be louder than usual
  - Providing close captioning
- Food options for cultural dietary consideration

- Having a single point of contact for the hearing/sight impaired

**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.

**Management 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. 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.

# INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

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

**From:** **Tammy Legacy**  
**International Relations Committee Chair**

**Date:** **August 20, 2025**

**Subject:** **Internatioanl Relations Midyear Report - 2025**

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## Background

The IRC met on July 24, 2025. The majority of the IRC was in attendance. The committee was pleased to welcome President Abrahamson, who joined the meeting for part of the discussion.

## Discussion

The committee reviewed goals for the upcoming year focusing on the following priorities:

1. Expanding membership in Regions X and XI
2. Featuring members from Region X and XI in News Digest inserts
3. Enhancing the Opening Ceremony flag presentation, with particular attention to proper protocol for Regions X and XI.
4. Ways to encourage more interaction between regions
5. Reinvigorating the Buddy Program

**Financial:** The committee discussed potential funding needs for the Buddy Program. Linda Larter will follow-up with Chris Shalby to determine whether a formal funding request should be submitted to the IIMC Board.

## Summary and Next Steps

**The meeting was productive, and several action items were identified:**

- **News Digest:** Linda Larter and Arnout van Kooij will draft articles; Tom Van Der Hoven will contact international members to recruit volunteers.
- **Flag Ceremony:** Linda Larter and Arnout van Kooij will collaborate with Janet Pantaleon to refine music and protocol, including consideration of alternative flags.
- **Buddy Program:** The committee expressed strong enthusiasm and will continue promoting the program.

The IRC intends to meet monthly, or as needed, to advance these initiatives.

## Management's Comments:

We appreciate the work of this Committee. We are always pleased to publish articles in the News Digest. The Buddy Program is on our website and has been promoted in the News Digest. We look forward to a new protocol and process regarding the Flag Ceremony and Region XI anthems.

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Board of Directors

**From:** Camilla G. Pitman, MMC, Chair  
Julie Ogg, MMC, Vice-Chair

**Date:** September 17, 2025

**Subject:** Membership and Mentoring Midyear Report - 2025

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**Committee Members:** Rachael Brinson, Lisa Burd, Stephanie Carrara, Stephen Clough, Cristina Guilford, Jessica Hilts, Susan D. Jackson, Janet LeViner, Melissa Reed, Sabrena Reinhardt; BOD Liaisons Julie Barnett, Shawn Campbell, Stephanie Coulbourne

**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.

**Financial:** A request was made to the Budget Committee for \$1,100 to cover the expense of meeting the goals and objectives for this year.

**Summary:** This Committee met virtually in June and August and is working monthly to meet the goals and expectations assigned to it. Below is a summary of work that is being completed for each of the goals and objectives.

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. Be prepared to provide the new member with IIMC's phone and fax.

**RESPONSE:** The Committee Members have been assigned to an IIMC Region for contacting monthly the new members, new CMC designees, and new MMC designees, welcoming new members and congratulating designees on their achievements while encouraging all to participate in the Mentor/Mentee program and to continue to pursue educational opportunities. The months of May, June, July, and August have been received and distributed as of the date of this report.

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.

**RESPONSE:** This objective will be addressed in early 2026 and will be reported in the 2026 Board of Directors Annual Report in May.

3. Showcase the Mentoring Program and its importance through at least 1 article in the News Digest.

RESPONSE: The Committee is currently working on an article to submit for the January, or first 2026 issue, News Digest.

4. Update the current mentors/mentees list.

RESPONSE: With the assistance of the Members Services Staff, the Mentors/Mentees list is reviewed and updated on a regular basis.

5. Continue to recruit mentors and mentees.

RESPONSE: The Chair issued a challenge for all Committee Members apply to the Mentors/Mentees program so that the Committee can offer 100% percent participation. The objective is for the Committee to affirm support for the program by participating in the program. Currently, 7 out of 10 Committee Members have committed to the program by submitting an application.

The Committee Members have been encouraging participation in the Mentors/Mentees program through monthly contacts with new Members, new CMC designees, and new MMC designees. As of August 26, there were 95 pairs of Mentors/Mentees, 88 Mentor applicants in waiting, and 2 Mentee applicants in waiting.

Survey. In an effort to receive feedback regarding the Mentor/Mentee program, the Committee has developed a survey that is anticipated for distribution in November to the current participants. The survey has been forwarded to the Executive Director with a request for review by the Research and Resource Committee.

6. Priority Objectives.

RESPONSE: This Committee was asked in July to review two items involving Bulk Membership and Constitutional Changes to membership levels. After further conversation, it was determined that both items were still under review by the Futures Committee. The request was later withdrawn until further notice.

RESPONSE: This Committee was asked in September to review two requests for reconsideration as Additional Full Members. Following discussion and debate, the Committee, by a majority, voted (1) to deny both requests based on not meeting the eligibility requirements as outlined in the IIMC Constitution and (2) to retain both members as Associate Members.

**Management's Comments:**

The Committee's survey to improve the member/mentee program has yet to be sent as of this writing. However, we look forward to the results once it's complete in November. We are happy to publish any article in the Digest as well as work with committee members at the Welcome First-Timers table during the 2026 Conference.

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

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

**From:** **Alicia Richardson, CMC, Chair**  
**Cassidy Mueller, CMC, Vice Chair**

**Date:** **October 24, 2025**

**Subject:** **Records Management Midyear Report - 2025**



### Meeting Report Background:

The goal of the Records Management Committee is to educate and engage the membership by providing informative sessions and articles for managing records.

### Discussion:

As a recap, a committee report was provided on August 7, 2025, with the following highlights:

- (3) Record management articles prepared and submitted to Janet for the News Digest
  - Modernizing Municipal Records, A Practical Guide to Digital Records Management, Retention & Responsible Purging, by Heather Abraham
  - Records Digitization-Getting Your Stakeholders on Board, by Toni Cone
  - Tales from the Dark Side of Records Management: A Municipal Clerk's Horror Story, by Lucinda Williams
- Technical Bulletins were assigned at the August 6 meeting for review and comments, if applicable, to Janet/Marlena.
- Ongoing ideas/activities – social media campaign, survey, technical bulletins for new technology (AI), article requesting members to share their best practices for records management, and scholarship/grant opportunities.

Following the August 7<sup>th</sup> report, the committee met twice, and discussion was focused on improving resources available for the membership, new opportunities to engage the membership (social media and sharing tips and tricks/best practices), grouping technical bulletins for novice city clerks, possibility of creating a records management scholarship (funding provided by record management sponsors) for a municipality to implement a records management program that could consist of a grant match by the municipality. The committee understands the various demands on staff; committee members will create graphics for staff to post on social media.

The committee agreed that a survey of the membership would assist not only this committee, but future committees, to determine what our membership would like at the annual conference. The committee inquired about previous surveys following the annual conference and asked staff if they could provide data/information on seminars that were not well attended and record management breakouts that were popular among the membership.

The following questions will be used for the records management survey.

#### **1. Current Training Value**

How valuable have you found the current records management training offered through IIMC or your state association?

(Options: Very Valuable, Somewhat Valuable, Neutral, Not Very Valuable, Not Applicable)

## **2. Preferred Training Formats**

What format of training do you find most effective for learning records management topics?  
(Options: In-person workshops, Virtual live sessions, On-demand/recording training, Written guides/toolkits, Peer-to-peer roundtables)

## **3. Topics of Interest**

Which records management topics would be most useful for your position?  
(Check all that apply: Retention schedules, Electronic records/digital archives, Public Information Act/FOIA compliance, Disaster recovery/business continuity, Records software & technology, Best practices/policies, Other – please specify)

## **4. Skill Confidence**

How confident do you feel in your ability to manage records in compliance with legal and professional standards?

(Options: Very Confident, Somewhat Confident, Neutral, Not Very Confident, Not Confident at All)

## **5. Future Training Needs**

What type of records management training or resources would best support you in your role going forward?

(Options: Retention/Disposition, Emergency Preparedness, AI Technology, Public Information Access/FOIA, Staff Records Management Training, Other Open-ended response)

The committee discussed that learning opportunities should not be limited to the annual conference. Additional record management training could be available online (1-hour zoom calls, webinars, podcasts, etc.).

### **Financial:**

If the Board agrees, future funding for a podcast would be beneficial to the membership.

### **Summary:**

The committee is thinking “outside the box” to identify various opportunities for the membership to engage, share, learn and grow in the world of records management. The committee would like to utilize social media and podcasts to increase awareness of the importance of records management. The committee requests the Board consider an education session where a vendor (Access, Laserfiche, etc.) co-presents with a city clerk at the annual seminar. The committee will provide two (2) additional articles to include in the News Digest.

### **Management’s Comments:**

We look forward to revising the Technical Bulletins. We know the committee, with staff’s help, has started to review the Bulletins. Any article regarding Records Management was published in the October Digest and more will be published in the E-zine as they are submitted. As for Vendor education sessions, we no longer allow those at our conferences -too many attendees complained that they were more of product demonstrations than actual seminars. Sponsors have an opportunity to present webinars, however, there are no education points provided. Staff can help with disseminating surveys, although the benefit would be membership wide as opposed to just the Conference attendees.

# INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Board of Directors  
**From:** Erika Hammond, MMC, Chair  
Laura Pierce, MMC, Vice-Chair  
**Date:** October 20, 2025



**Subject: Research and Resource Midyear Report - 2025**

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## **Background:**

The Research and Resource Committee is to work in concert with the IIMC Education Department to gather information and data on an as-needed basis and provide said information to the IIMC Board of Directors and/or Committees to assist in the decision-making process. This Committee shall also respond to requests for information from IIMC members and suggest new methods for improving the availability and delivery of current and accurate information.

The 2025/2026 goals and objectives are as follows:

1. Review in-house publications (Roll Call and Language of Local Government).
2. Assist in developing and disseminating surveys and questionnaires as requested by the Board of Directors, Committees, and staff.
3. Respond to member questions submitted to the IIMC website and staff.
4. Review and possibly update, current or create new IIMC Technical Bulletins.

The Committee reviewed surveys and contributed valuable input to broader questions from the membership. Topics included: records management training, mentor/mentee program; and retention schedules. These efforts reflect our support of IIMC's data-gathering and decision-making processes.

**Financial:** - None for FY 2025–2026.

**Summary:** The Committee has not yet convened formally to address the broader objectives. As Chair, I acknowledge this delay and take full responsibility. However, I remain committed to re-engaging the committee and making meaningful progress in the months ahead. Planned next steps include:

1. Scheduling a Committee Meeting in November 2025 to revisit objectives.
2. Developing a Work Plan for the remainder of the term.
3. Improving Communication among members to ensure consistent engagement.

This assignment is not taken lightly, and I am fully committed to ensuring that the Committee meets regularly and works collaboratively to address our goals and objectives. I am especially grateful for the support and readiness of Co-Chair Laura Pierce, whose responsiveness and willingness to assist have been invaluable. Her partnership strengthens our ability to move forward with purpose and efficiency. With renewed focus and teamwork, I am confident that we will make meaningful progress and deliver results that support IIMC's mission by April 2026.

**Management's Comments:** Chair Hammond has expressed that the Committee was slow to start but anticipates a fruitful 2026. We look forward to their review of IIMC materials. We also appreciate the Committee's expeditious answers to surveys and member inquiries.

# INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

To: IIMC Board of Directors

From: Lee Frazier, Chair IIMC Ad-Hoc Host Committee Advisory Group

Date: October 8, 2025

Subject: Ad-Hoc Conference Host Committee Advisory Group - 2025



## Purpose

This report provides a consolidated summary of the recommended changes to the IIMC Ad-Hoc Host Committee Manual. Although the recommendations are primarily editorial in nature and focus on clarity and improved wording, they also incorporate insight gained from recent Host Committees and feedback from committee chairs. However, much of the feedback received from committee chairs is not directly reflected in the revisions due to its limited relevance to the core structure and purpose of the manual. The overall intent is to ensure consistency, enhance usability, and strengthen communication among all stakeholders.

## Committee Members

Lee Frazier, Chair and President-Elect, IIMC – Birmingham, AL

Chris Shalby, Executive Director, IIMC

Diane Whitbey, MMC – Little Rock, AR

Linda Rappe, MMC – Kasson, MN

Joel Hondorp, MMC – Grand Rapids, MI

## Discussion

### July 21, 2025:

The Ad-Hoc Host Committee Advisory Group held its initial meeting, which included introductions and an open discussion of past conference experiences. Members shared insight into what worked well and what areas presented challenges. During this meeting, individual chapters of the manual were assigned to committee members for review and markup prior to the next session, with the goal of identifying potential revisions and updates.

### August 18, 2025:

The committee convened its second and final meeting to review and present recommended revisions to the manual based on the members' evaluation of assigned chapters and feedback from the committee's initial discussion.

## Recommendations

The proposed revisions to the Host Committee Manual are reflected in the marked-up version submitted with this report. These changes include suggested edits, clarifications, and additions primarily focused on improving clarity and consistency throughout the document. At this time, it is recommended that the Board defer adoption of these revisions until the Executive Director has completed a final review.

The Ad-Hoc Host Committee recognizes that the Host Committee Manual serves as a working tool for the Executive Director and IIMC Headquarters staff. Therefore, the Committee believes it is essential for the Executive Director to review the document and provide input prior to final approval. His operational perspective and firsthand experience in coordinating Host Committee activities are invaluable to ensuring that the manual remains both practical and aligned with the day-to-day needs of the organization.

In addition to the editorial refinements, the Committee recommends the inclusion of a new **Contingency and Emergency Preparedness** section within the Appendix. This addition stems from recent experiences, including the COVID-19 pandemic, weather-related challenges during the St. Louis conference, and issues encountered during the Calgary conference. The purpose of this section is to establish a clear framework for responding to emergencies such as health crises, severe weather, or other unforeseen incidents that may impact conference operations.

### **Contingency and Emergency Preparedness**

IIMC shall develop a contingency plan to address unexpected events such as health emergencies, natural disasters, extreme weather, or cancellations.

The plan should identify:

- Decision-making authority and communication flow
- Alternative venues or virtual conference options
- Financial procedures for refunds, insurance claims, or rescheduling
- Public messaging protocols and coordination with local authorities

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

Thanks to President-Elect Frazier and the members of the Ad Hoc Group for taking the time to fine tune the Conference Planning Manual. It's been more than 20 years since I created it, and it needed work.

Management has already condensed the bulk of the material from the Conference Manual to a “cheat-sheet” overview and will be using that information with host clerks for future conferences. The overview narrows the scope of the host committee’s responsibilities, thus, creating a more streamlined approach to the committee’s overall roles.

We agree with policies on contingency and emergency plans. For the 2020 conference (originally scheduled for St. Louis but was cancelled due to Covid-19), we managed communications with the Hotel, the Board, Host Committee and delegates. We can rely on notes and the action plan from that time period to create a policy.



# CONFERENCE PLANNING MANUAL

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# CONFERENCE PLANNING MANUAL

## CONFERENCE PLANNING POLICY Chapter 1

### IIMC'S ANNUAL CONFERENCE PHILOSOPHY

The primary purpose of the IIMC Annual Conference is to provide high quality professional development, leadership training, networking, and global engagement opportunities for IIMC members, peers, and partners. The conference also serves as a revenue source to strengthen IIMC programs and services and to introduce new initiatives that directly benefit members.

### CONFERENCE PLANNING MANUAL

The Annual Conference is a premier IIMC event designed for members affiliates, and international partners. This Planning Manual is a best practices guide that will be reviewed and updated periodically to reflect current industry standards and evolving member needs.

### PLANNING/PROGRAM DEVELOPMENT

### CONTRACTS

#### Hotel Assignments/Room Rates:

All contracts for services, goods, or materials financially binding IIMC must be reviewed, approved, and executed by IIMC headquarters. Any rebates, concessions, or incentives associated with the hotel rates or meeting packages must be disclosed and pre-approved in writing by IIMC.

#### Meeting Space Assignments:

### FINANCIAL RESPONSIBILITY

### CANCELLATIONS

The Conference's main purpose is to provide quality education, Athenian and Academy programs, an exhibit hall and a variety of networking opportunities for IIMC members and their colleagues. This event is intended to raise money to supplement IIMC's existing programs, to develop new ones and to implement new products and services to benefit IIMC members.

The Annual Conference is an IIMC program offered to its members and their guests. The Conference Planning Manual is a living document subject to change to allow for Conference growth.

IIMC plans, develops and implements programs, financing, marketing, evaluating and administering activities at its Annual Conferences.

These tasks are carried out in collaboration between IIMC and its partners -- Municipal Clerks from the Host City, State, Province or Country where the Conference is held. IIMC also relies on sponsors, learning institutions and organizations to aid in producing a first-class event.

IIMC approves and signs all contracts for services, goods or materials which are IIMC's financial responsibility.

The Host City and /or CVB cannot add rebates to the sleeping room rates without IIMC's expressed permission.

IIMC is responsible for selecting its Conference Host and Overflow hotels, for assigning space within the hotels and for negotiating concessions and setting group rates.

IIMC is solely responsible for assigning all meeting space within its Conference hotel(s) and convention center.

Financial responsibility for Conferences is shared among IIMC, Host City, Host State, Provincial or Country Associations, and other groups who may benefit or support Conference activities.

Conference costs are recovered in full through Conference registration, individual and group contributions of time and resources, voluntary contributions, and other sources of support, sponsorships, fundraisers and donations - be it monetary or in-kind. IIMC seeks a financial profit from Conference income.

IIMC reserves the right to cancel or postpone its Annual Conference due to circumstances beyond its control in accordance with contractual obligations.



# CONFERENCE PLANNING MANUAL

## CONFERENCE PLANNING POLICY

### Chapter 1 (continued)

#### ASSIGNMENTS

**Fees:**

**Schedules:**

**Duties:**

**Registration:**

**Badges:**

**Office Materials:**

**Receipts:**

**Security:**

IIMC establishes all registration fees, the Conference daily schedule; receives and deposits all monies; maintains Conference records; sends registration acknowledgments and conference updates to Delegates; develops volunteer needs list, hours, duties, etc.; arranges space for registration work area, storage and IIMC office; assigns Host Committee workroom; prepares individual registration envelopes with registration cards, badges, ribbons and event tickets.

IIMC arranges for office materials, controls cash receipts and deposits, oversees Delegate and Guest registration, and arranges security for the area.

#### CONFERENCE EVALUATIONS

IIMC is responsible for creating, administering and processing a Conference evaluation plan. IIMC will analyze and report evaluation results.

#### CONFERENCE TOURS (IF APPLICABLE)

IIMC is responsible for selecting and contracting with the local tour operator to provide pre and post and daily guest/spouse Conference Tours; promoting tours in various publications; and arranging for on site tour operator.

#### HOTEL ACCOMMODATIONS

IIMC arranges hotel accommodations for IIMC staff, IIMC Board, and invited Region X and XI guests in contracted hotel rooms.

#### BOARD MEETINGS

IIMC schedules and arranges meeting space, provides audio visual needs, prepares agendas and materials for IIMC Board meetings (there are two planned meetings).

#### MARKETING/PROMOTION (SEE CHAPTER 8)

IIMC is responsible for the overall Conference marketing, promotion and public relations program. This includes directing the writing, designing and printing of all materials in the *News Digest*, Teaser Program, Conference Program, IIMC web site, E-Briefings and other materials.

#### INVOCATION/PUBLIC PRAYER GUIDELINES

All sit-down, plated meal functions, Annual Business Meeting and Opening Ceremony require an invocator to administer a non-denominational prayer.



## CONFERENCE PLANNING MANUAL

### IIMC SITE VISITS Chapter 2

#### IIMC/HOST COMMITTEE RESPONSIBILITIES

During IIMC's Site Visit, IIMC staff will meet with the Host Committee to discuss the Annual Conference. As part of the Site Visit's goals, IIMC needs to visit and inspect the following venues:

- Conference hotels,
- Convention Center if it will be used,
- Exhibit Hall,
- Breakout rooms for concurrent education sessions,
- All-Conference event venue,
- Opening Reception venue TBD annually
- Annual Banquet venue, and
- Opening Ceremony venue.

IIMC will also need to meet with the following groups:

- Host Committee Chairs,
- All-Conference Event caterers,
- Annual Banquet caterers,
- Luncheon caterers,
- Tour operators, if any,
- CVB personnel assigned to the Conference,
- Transportation providers,
- Hotel management and staff to Conference, and
- Decorators (Exhibit Hall).



# CONFERENCE PLANNING MANUAL

## EXHIBIT PROGRAM Chapter 3

### EXHIBIT HALL PURPOSE

The Exhibit Hall provides a platform for regional, national, and international vendors to showcase innovative products, technologies, and services that support the clerk profession by directly or indirectly enhancing the professional work of Clerks and the overall efficiency of governmental and organization operations.

The purpose of an IIMC Exhibit Hall is to recruit regional, national and international vendors to display their current products or introduce new ones to IIMC Conference attendees. The Exhibit Hall encourages any vendor who deals directly or indirectly with local government units and Municipal Clerks.

### HOST COMMITTEE RESPONSIBILITIES

#### Exhibit Hall Entertainment (TBD):

Provide IIMC with a list of names of local or regional exhibitors who are interested in exhibiting at the Annual Conference. Local exhibitors (not affiliated with IIMC) will receive a discounted rate to exhibit.

Provide IIMC with Exhibit Hall entertainment and assumes financial responsibility, keeping in mind Conference theme and International tastes.

IIMC will develop a promotional package (exhibitor program w/letter and contract) to be mailed no later than January prior to the Conference. IIMC will also:

- Establish the cost of the Exhibit Program;
- Contact IIMC regular and potential exhibitors;
- Market the Exhibit Hall program to all vendors including the prospective vendor list from Host Committee;
- Inform the Host Committee when specific vendors are approached so Host Committee and IIMC can collaborate on follow-up and Exhibit Hall details.
- Contract Exhibit Hall service providers (i.e., decorators, caterers, etc.); and coordinate Exhibit Hall Opening;
- Provide security for exhibit area; and
- All costs associated with Exhibit Hall setup decorations.

IIMC will coordinate these functions with the Host Committee when required.

#### Revenue:

IIMC retains all revenues from the Exhibit Hall.

#### HOST BOOTH:

IIMC will provide Host Committee one complimentary booth at all Annual Conferences beginning with the first Conference after your City has been awarded the bid. IIMC will provide Host City one complimentary double booth at Conference preceding yours.



# CONFERENCE PLANNING MANUAL

## HOST COMMITTEE SPONSORED EVENTS/GIFTS

### CHAPTER 4

#### HOST COMMITTEE RESPONSIBILITIES

##### **Host Committee Meetings:**

The following lists all events, programs, gifts and prizes which require the Host Committee to either provide at its own costs or to acquire sponsorship or funding sources to ensure these items are accomplished.

##### **Host Committee/IIMC Staff Virtual Meetings**

Host Committee

##### **Host Booth:**

All Host Committee meetings prior to the Conference. These Meetings are scheduled by Host Committee Chair/Host Clerk as necessary.

##### **Delegate Bags**

One year prior to Conference, IIMC will conduct monthly virtual meetings with the Host Committee. Times/Dates TBD.

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You must staff your host Booth annually at the Conference beginning with the first Conference after your City has been awarded the bid.

Traditionally, IIMC sponsor will procure the Delegate Bag in conjunction with the Host Committee. Otherwise, this will be the Host Committee's responsibility.

##### **Opening Ceremony:**

Acquiring flag, flag stands and poles for the host city and state. These will remain for the duration of the conference.

##### **Speakers:**

The Host Committee can recommend general and concurrent education speakers. IIMC's Education Department has final approval on all speakers.

##### **Door Prizes/Optional Gifts:**

Door prizes are distributed as part of the Exhibit Program. Optional gifts may also be provided at the Host Committee's discretion. However, if the Host Committee decides to provide delegates with gifts or door prizes, it is their financial responsibility to acquire these items. Host Committee gifts may be included in delegate tote bags.

**Optional.** However, if the Host Committee decides on providing Delegates with gifts or door prizes, then it is their financial responsibility to acquire these items. Door prizes are distributed as part of the Exhibit Program. Host Committee gifts may be included in Delegate tote bags.

IIMC must approve the hanging of any Conference theme banner, display, sponsor placards or use of the IIMC or other logos, etc. prior to the printing of such matter.



## CONFERENCE PLANNING MANUAL

### HOST COMMITTEE SPONSORED EVENTS/GIFTS

#### Chapter 4

#### HOST COMMITTEE RESPONSIBILITIES (CONTINUED)

##### IIMC SITE VISITS

The Host City/CVB must provide IIMC staff complimentary accommodations (includes hotel lodging, transportation around your city, meals and other related expenses) for a "pre-conference site visit" (scheduled for June or July or August).

##### IIMC RESPONSIBILITIES

IIMC will provide the host city with sponsorship guidelines. This will include which companies can be approached for sponsorship and where the hosts can and cannot recognize their sponsors, i.e., banners, printed brochures, programs, etc.



# CONFERENCE PLANNING MANUAL

## FINANCE Chapter 5

### HOST COMMITTEE RESPONSIBILITIES

#### **Host City Conference Planner:**

All costs incurred if it employs its own conference planner or consulting firm. Consultant is bound by all guidelines contained within this Manual.

#### **Host City Sponsorship**

Host Committee's financial obligations are outlined in Chapter 4. IIMC encourages Host Committee to solicit sponsorships from local business to help meet these costs. **entities**

#### **Enhancement Responsibilities**

Host Committee must consult with IIMC staff regarding Conference enhancements.

### IIMC RESPONSIBILITIES

IIMC is responsible for the Conference budget. IIMC also:

- Confirms and preapproves all expenditures incurred by the Host Committee relating to items which are not specific Host Committee responsibilities outlined in Chapter 4;
- Maintains Conference accounts and financial records;
- Contract with hotel(s), convention center, special event facilities and any other related service;
- Arranges insurance to cover event venues;
- Pays for any permit required for any event during conference and reviews all other Conference insurance coverage; and
- Reviews insurance coverage of transportation and tour companies.

#### **IIMC Sponsorship:**

IIMC is responsible for seeking and working with Conference sponsors to help offset Conference expenses.



# CONFERENCE PLANNING MANUAL

## EDUCATION SESSIONS

### Chapter 6

#### HOST COMMITTEE RESPONSIBILITIES

Recommend to IIMC's Education Department special presenters and topics.

#### IIMC RESPONSIBILITIES

- Coordinate and administer all aspects of the education program in collaboration with IIMC's Conference Committee
- Meet with Host Committee.
- IIMC will consult with Committee Chairs, Board of Directors, Institute Directors and others on preferred sessions and speakers.
- Select concurrent sessions, Academy seminars, and Athenian Dialogues, contact proposed presenters and design education programs.
- Confirm presenters, conveners, scanners, sessions, fees and expenses and finalize presenter contracts.
- Schedule speaker housing, session room, audio/visual needs and other accommodations.
- Prepare and maintain individual files on education sessions and presenters.
- Overall conference evaluations.
- Develop master program schedule of education sessions including dates, times, locations, convener information, audio visual requirements and other support information.
- Administer education program on-site.
- Conduct education sessions and Conference evaluations as preferred, and report survey results.
- Coordinate on-site speaker greeting, transportation and hotel arrangements.
- Create and maintain online Conference registration process and Conference APP.



## CONFERENCE PLANNING MANUAL

### GENERAL SESSIONS AND EVENTS

#### Chapter 7

#### HOST COMMITTEE RESPONSIBILITIES

##### Opening Reception:

The Host Committee is responsible for coordinating either all or part of the following events during the Conference week.

The Host Committee may collaborate and assist with obtaining local enhancements to this event that may include adding to the basic food and drink, music, decorations, permits and any other related materials. Any additions to the event that the Host Committee would like to include must be pre-approved by IIMC.

##### Opening Ceremony:

The Opening Ceremony is scheduled for (2 hours). Attendees include all Delegates, Guests, Institute Directors, Exhibitors, Sponsors, IIMC Staff, Host Committee and Volunteers.

The Host Committee assists with:

- Suggesting site (exhibit hall, theater, auditorium, etc.);
- Inviting Mayor, Governor and other dignitaries;
- Obtaining Color Guard for National Anthem;
- Providing host city flavor (entertainment) suggestions;
- Recommending and, upon approval, obtaining emcee, entertainment, keynote;
- Providing volunteers to usher, assist backstage moving chairs or musical instruments on and off stage on cue, assist with flag to pole assembly and distribution during rehearsals and actual ceremony;

##### Meal Events/Invocators:

- IIMC is responsible for selecting invocators. .



## CONFERENCE PLANNING MANUAL

### GENERAL SESSIONS AND EVENTS

#### Chapter 7 (continued)

#### HOST COMMITTEE RESPONSIBILITIES (CONT.)

##### Regional Dinners:

This is an optional evening event to be coordinated by IIMC's Regional Directors. The Host Committee may suggest restaurants.

##### All Conference Event:

The Host Committee will work with IIMC to enhance this event, adding local flavor and touches:

- Suggesting venue (see Site Visit - Chapter 10),
- Coordinating with IIMC to plan and schedule the program,
- Providing food, beverage, entertainment suggestions,
- Providing assistance with acquiring any necessary permits on IIMC's behalf (see Chapter 4),
- Providing volunteers, and
- Assisting with transportation loading.

##### Annual Banquet:

The Annual Banquet is held on the last evening of the Conference. A one-hour No-Host Reception precedes the Banquet. The Host Committee is responsible for:

- Acquiring accompaniment (such as bag pipers) for procession,
- Acquiring centerpieces if possible;
- Acquiring give-away at prior year's banquet;
- Recommending banquet entertainment if needed with IIMC's approval, and
- Providing volunteers to help with badge checking and ticket taking.



## CONFERENCE PLANNING MANUAL

### GENERAL SESSIONS AND EVENTS

#### Chapter 7 (continued)

### IIMC RESPONSIBILITIES

#### **Opening Reception:**

IIMC will work with the Host Committee to coordinate the following events.

#### **Opening Ceremony:**

IIMC will coordinate with the Host Committee the planning of the Opening Reception. IIMC is responsible for financing the event, providing the event is within IIMC's Board approved budget.

IIMC, in collaboration with the Host Committee, is responsible for planning, overseeing and executing the Opening Ceremony program. IIMC is responsible for:

- Incorporating the Conference theme in the Ceremony;
- Approving musical accompaniment and light design;
- Developing "prompt script" from speeches acquired, entertainment and selected music and lighting agreed upon and staging requirements;
- Directing (issue all cues) the show;
- Scheduling production meetings and two rehearsals - technical (light and music technicians and backstage hands) and general rehearsal;
- Confirming speakers and entertainment recommendations from the Host Committee;
- Assigns and instructs volunteers;
- Designing and directing the Parade of Flags;
- Providing national anthems; and flag bearers;
- Confirming speakers (if any) and Invocator
- Budgeting for and discuss room decorations with Host Committee (if necessary);
- Arranging meal space, menus and audio/visual needs;
- Overseeing setup; and
- Preparing event agendas and convener scripts.



## CONFERENCE PLANNING MANUAL

### GENERAL SESSIONS AND EVENTS

#### Chapter 7 (continued)

#### IIMC RESPONSIBILITIES (CONT.)

##### **Regional Dinners:**

IIMC is not involved in coordinating Regional Dinners. However, IIMC will direct questions on restaurants and costs to the Host Committee.

##### **All-Conference Event:**

- Confirm and contact venue, menu and entertainment;
- Arrange and schedule transportation;
- Sign contracts; and
- Provide venue insurance coverage.

##### **Annual Business Meeting**

- Arrange space, menu, and audio/visual;
- Oversee setup of head table;
- Coordinate presentation, oaths of office, outgoing certificates to Board and Committee Chairs; and
- Provide Invocator.

##### **Annual Banquet:**

- Arrange space, menu, audio/visual and decorations;
- Plan and contract entertainment;
- Oversee setup of head table and head table line up;
- Prepare agenda and script for emcee; and
- Provide Invocator.



# CONFERENCE PLANNING MANUAL

## MARKETING AND PROMOTION

### Chapter 8

#### HOST COMMITTEE RESPONSIBILITIES

The Host Committee will obtain publication and program deadlines from IIMC and collaborate with IIMC's requeststo:

- Provide materials/ photos for *News Digest*, preliminary program, E-Briefings and IIMC 's web site;
- Provide conference information for final program;
- Collaborate with convention and visitors bureau to provide internet link and other social media promotions;;
- Provide promotional Conference material at prior years' conferences;
- **May** obtain materials to include in the Tote Bag (local maps, restaurant guides, local information, specialty item hostgift or conference memento and other giveaway);
- Arrange for volunteers to stuff and distribute Tote Bags;
- Collaborate with IIMC Executive Director in dealing with the media.
- Obtain letters and photos from Mayor and Governor;
- In collaboration with IIMC, Develop Conference theme and logo,

#### Delegate Bags:

Procure via purchase or arrange donation of Conference bags to be given to all registered Delegates, retired members, Institute Directors, Exhibitors and staff. IIMC must preapprove bag and design.

#### IIMC RESPONSIBILITIES:

- Collaborate with Host Committee, CVB representatives and others during site visit;
- Establish Conference marketing / promotion plan and implement schedule;
- Promote Conference in *News Digest*, E-Briefings, etc.;
- Write and design Conference Teaser program;
- Write, design and print Conference final program;
- Prepare and disseminate news releases; and
- Coordinate official Conference photographer,



# CONFERENCE PLANNING MANUAL

## REGISTRATION/IIMC OFFICE/HOSPITALITY

### Chapter 9

#### HOST COMMITTEE RESPONSIBILITIES

The Host Committee is responsible for providing IIMC with Conference equipment (either as in-kind or donated services), volunteers and other items to ensure a smooth Conference operation. It is preferable that the Host Committee wear outfits which will distinguish them from the rest of the Delegates and to promote volunteer visibility. Here is a list of activities which require the efforts of the Host Committee's volunteers:

- Assist IIMC Staff at registration desk and in office;
- Provide local people who know the area and can help with directions and other city information; (e.g., host Clerk, tourism bureau, etc.); and
- Assemble delegate packets.

#### Volunteer Help During Conference:

#### Equipment For Conference:

Provide the following equipment for the following areas:

- IIMC OFFICE
  - 3 laptops ~~Laptops~~

**(All with most current Microsoft Office - Outlook, Word, Excel and Powerpoint, also need internet ready)**

- 1 laser printers (all PC/laptops need to print)
- 1 copier, 60+ppm, staple capability (w/ extra staples)
- 3 cartons of copier paper

- Arrange on-call service for companies, printers and copiers to be available beginning Friday through Thursday from 7 a.m. to 9 p.m.;

#### Hosts And Hostesses:

IIMC will supply a listing of daily activities and the number of volunteers needed to the Host Committee regarding events for which guides, official greeters, badge checkers and ticket takers are needed. Here are events requiring guides, ticket takers, badge checkers and Greeters:

#### Greeters:

- Registration, Opening Ceremony, General Sessions, Annual Business Meeting/Breakfast, All Conference Event, Exhibit Hall, Annual Banquet, Opening Reception, Off-Site programs, and meal functions.



## CONFERENCE PLANNING MANUAL

### REGISTRATION/IIMC OFFICE/HOSPITALITY

#### Chapter 9 (continued)

#### HOST COMMITTEE RESPONSIBILITIES (CONT.)

##### Airport Guides:

- Arrange for greeters to be available when the majority of Delegates are arriving to direct them to transportation shuttles and to answer basic questions, etc.

##### Pre-and Post Conference Tours:

- Recommend tours and tour operators if required.

##### IIMC Annual Board Meeting:

The current Host Clerk welcomes the Board of Directors at IIMC's Annual Board Meeting. This is usually held on a Saturday.

##### IIMC Annual Business Meeting:

The future Host Clerk is responsible for attending the Annual Business Meeting and providing an official invitation to next year's Conference.

##### Conference Evaluation Forms:

IIMC's Education Department will oversee the Conference evaluation process..



# CONFERENCE PLANNING MANUAL

## HOST SUB-COMMITTEES

### POSSIBLE SUB-COMMITTEES

#### BUDGET/FINANCE

The following are suggestions for creating sub-committees within the Host Committee to help with conference activities.

Coordinate and oversee all Host Committee finances and fundraising activities.

#### DOOR PRIZES

#### EDUCATION

#### EXHIBIT PROGRAM

#### GUEST/SPOUSE PROGRAMS

#### HOSPITALITY/VOLUNTEERS

#### PUBLICITY

#### REGISTRATION

#### TRANSPORTATION

#### CONFERENCE THEME/LOGO

Secure door prizes, assign responsibilities for drawings at exhibit breaks or other scheduled times.

Work with IIMC's Education Department and state educational institutions, municipal leagues, etc. Recommend speakers with outstanding program content, presentation.

Assist IIMC in contacting local exhibitors for exhibit hall as needed and collaborate with IIMC on theme ideas for Exhibit Hall.

Recommend guest and spouse programs and tours.  
Recommend and work with Transportation Committee.

Greet Delegates, direct traffic in hotel as needed

Acquire promotional materials (articles/photos) for E-Briefings, social media and *News Digest*.

Assist in registration during Conference, help prepare Delegate packets.

Coordinate with IIMC all ground transportation pursuant to established policies and arrangements with IIMC HQ.

If needed, provide local bus guides if not provided by ground operator.

Collaborate with IIMC regarding Conference theme and logo. IIMC can help create logo and must pre-approve logo and theme.

Add an appendix section or another chapter outlining IIMC's procedures for addressing contingency situations, including health emergencies, severe weather, cancellations, and other unforeseen events.

# INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

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

**From:** **Susan Haag, MMC, Election Chair**  
**Stephanie Kelly, MMC, Election Vice Chair**

**Date:** **October 9, 2025**

**Subject:** **Election Midyear Report - 2025**

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**Background:** The purpose of the Election Committee is to conduct and supervise all elections and other necessary voting by IIMC Members. For the 2025-2026 year, the Election Committee has also been tasked with a number of formidable goals:

1. Reviewing the current and revised social media policy as it relates to elections
2. Reviewing the Elections Policy and making recommendations for the following considerations:
  - a. Should the election period officially open in July to provide all candidates an equal campaign timeline.
  - b. Consider whether the candidate filing deadline should be set for October, with voting commencing immediately thereafter.
  - c. Consider the perception that the election receives, the disproportionate attention and the impacts to the organization.
  - d. Under the current policy framework, consider how issues arise and escalate.
  - e. Explore opportunities to make improvements to the elections process, including but not limited to exploration of an election's vendor rather than continue to use Survey Monkey.
  - f. Consider no campaign period. Either one or two VP forums and candidate's biographies and photos posted on each region page.
  - g. Increase submitted candidate biographies from 200 words to 500 words.
  - h. Consider shortening the voting period from the current 15 days.
  - i. Update the current profile form including possible additional information to be provided including an affidavit that the candidate acknowledges the accuracy of the information and they will abide by the IIMC Election Policy and failure to do so may result in being removed from the ballot.
  - j. Find ways to ensure all members of Region XI are receiving the same information given the DPA requirements and differences in their membership status.
  - k. Recommendations for consistent Region Director communications with each Region to help increase voter turnout.
  - l. Consider forming a nominating committee to vet each candidate and their qualifications/requirements for office to determine the best fit.
  - m. Consider appointing 5 Board members to act as a nominating committee who makes the decision on a candidate and presents that to the Board.
  - n. Consider changing the entire structure of the EC and have a senior member of the Board act as President.

In order to comprehensively consider all aspects in a shorter time frame, the Election Committee was divided into three sub-committees dealing with policy, process and structure.

1. Policy Review Sub-Committee: Chair Stephanie Kelly, Members Bruce Poole and Sherri Gard. This sub-committee held discussions with the Policy and Review Committee.

2. Process Review Sub-Committee: Chair Jannette Goodall, Members Karen Frawley and Marc Donahue
3. Structure Review Sub-Committee: Chair Beth Hickman, Members Sandra McCready and Shelley George

#### **Discussion and Recommendations:**

1. **Policy Review Sub-Committee:** The sub-committee is continuing to work on finalizing its recommendations as of the publication of this report.
2. **Process Review Sub-Committee:**
  - a. **Profile Form and Candidate Biographies:** The subcommittee redesigned the profile (nomination) form and expanded it to include additional information that we believe would be helpful to members when educating themselves on the candidates. Individual biographies should be expanded from 200 to 500 words allowing the candidate to provide additional information. The form includes a “Certification” statement that must be signed by the candidate that the information is accurate and failure to abide by the election policy will result in the removal from the ballot. (See form attached).
  - b. **Complaint process:** Completed, the subcommittee designed a Complaint form which is to be completed by the members filing the complaint and submitted to IIMC Staff which will forward the Complaint to the Election Committee Chair. The Chair shall forward the complaint to the Committee for review and decision. (See Attached form)
  - c. **Candidate Forum:** The subcommittee recommends that two candidate forums be held and hosted by the Election Committee. The Chair of the Election Committee would vet campaign questions for the forum. Attached is a list of possible questions for consideration.
  - d. **Voting Platform:** Upon review of the election survey conducted in 2024, the subcommittee recommends staying with Survey Monkey but recommends more advertisement of the voting period through official IIMC social media and member distribution methods.
  - e. **Candidate Campaign:** The subcommittee recommends that candidate campaigning be through candidate forums and approved social media posts to IIMC Social Media pages. The committee understands we cannot prevent campaign posts on personal social media pages but any campaign posts to IIMC social media pages must be approved through the Executive Director. Any post not approved should be removed by IIMC staff from IIMC social media pages. The additional forms expanded candidate profiles and biographies would replace the individual posts and email distributions to members.
  - f. **Voting Period:** The subcommittee recommends the voting period be shortened to 2 week/10 business days.
  - g. **Election Process:** This area is still under consideration as the sub-committee was unable to confer with IIMC Executive Director to finalize recommended dates. The subcommittee does recommend that for the 2027 Election Cycle any campaign period be shortened and the dates moved up to reduce the campaign period and allow voting to occur earlier thus reducing any scheduling conflicts with the voting period resulting from the filing of election complaints.

3. **Structure Review Sub-Committee:**

- a. **Ethics Committee:** The sub-committee Recommends the creation of a standing Ethics Committee that would be appointed in a similar manner to other IIMC Committees and not by the IIMC President. That Committee would be tasked with addressing issues, among others, arising out of the elections process that rose to the level of an ethical violation. This would remove the IIMC President from the possible controversial appointment process for that committee and also streamline and speed up the decision-making process on ethics violations.
- b. **Board Structure:** Chair Hickman provided a comparison of the Board structures of the International City Managers' Association, the National League of Cities and the National Association of Parliamentarians to that of the IIMC Board. The Structure of the Society of Local Council Clerks (SLCC) was provided by President Abrahamson. After a great deal of thoughtful discussion, the sub-committee recommended that a survey be conducted through membership concerning the current Board structure and whether they see it as having a positive, negative, or neutral role in the members' experience with the organization. (See attached recommended questions that should be included but not limited to these alone.)

**Financial:** The Committee has no recommendations at this time. In the past the Election Committee had recommended the Board allocate the necessary funds for the selection of a voting software application to conduct IIMC Elections, but in a recent survey, results showed that the membership felt comfortable using the current system, Survey Monkey.

**Summary:** The Election Committee has made great progress to date and will continue to work on the goals given. I would like to thank President Abrahamson and the Board for the opportunity to Chair the Election Committee and serve the IIMC members. What an honor and privilege. I would also like to thank the Vice Chair, Stephanie Kelly, MMC and the Committee Members for their hard work, determination to excellence and support: Karen Frawley, MMC, Shelley George, MMC, Jannette Goodall, MMC, Beth Hickman, CMC, Sandra McCready, MMC, Bruce Poole, MMC, and Board Liaisons, Marc Donohue, MMC and Sherri Gard, MMC. A special thank you to Executive Director Chris Shalby and Janet Pantaleon for their help and guidance.

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

This is truly incredible and thoughtful work by the Elections Committee. Comments are below in the same order presented by the Committee

1. **Profile Form and Candidate Biographies** – We agree and recommend the Board adopted the new form, additional word count and the “Certification” acknowledging the process and policies. For this year, we have employed the current policy; however, if the Board approves these recommendations, we will notify the candidates.
2. **Complaint process** – We agree and recommend using the complaint process and form. The only apprehension is timeliness of the complaint. Yet, it does provide accountability.
3. **Candidate Forum** – We believed last year’s Candidate Forum was excellent. Holding two can also help the candidates embellish on their viewpoint and vision.
4. **Voting Platform** – Last year’s survey, conducted by IIMC Staff, indicated that more than 90% of voting members trust Survey Monkey as the election platform. It is a cost-savings and allows us to monitor members who have lost their ballot, voted and “forgot”

they voted and distribute new ballots to those who never received one due to their city's firewalls.

5. **Candidate Campaign** – This policy has been in place for several years, now. Each candidate receives the policy upon his or her announcement to run for office. The Board is also sent this policy since it clearly defines what you can or cannot do during the campaign period.
6. **Voting Period** – The current policy states: *The Election will be held for a 14-day period in the month of March, beginning on the first Tuesday of March and ending on the third Tuesday of March.* If the Board approves the Committee's recommendation to reduce the number of days to vote, we can easily do this since we have time prior to the next VP election.
7. **Election Process** – We can accommodate this recommendation if the Board wishes. Currently, the campaign period begins on January 16.
8. **Ethics Committee** – We've discussed creating a standing Ethics Committee, all to no avail since this is a topic that few people want to tackle. If the Board wishes to create an Ethics Committee as a stand-in Committee for the campaign and election periods, that would be one matter.
9. **Board Structure** – This is not the first time the topic of Board Structure has been broached. A survey could be beneficial. Yet, the majority of members do not join Organizations because of its Boards. In Management's opinion, Boards are to serve the best interest of the Organization, not necessarily its Regions.



## International Institute of Municipal Clerks

### **Vice President Nomination Form**

Please place my name in nomination for the office **IIMC Vice-President**:

Name: \_\_\_\_\_ CMC (  ) MMC (  )  
Title: \_\_\_\_\_ Phone: ( \_\_\_\_ ) \_\_\_\_\_ Fax: ( \_\_\_\_ ) \_\_\_\_\_  
Municipality: \_\_\_\_\_  
State/Province/County \_\_\_\_\_ Postal/Zip Code: \_\_\_\_\_  
E-mail Address: \_\_\_\_\_

#### **Qualifications:**

1. How many years have you served as a Municipal Clerk?
  - Answer: \_\_\_\_\_
2. How many years have you been a member of IIMC?
  - Answer: \_\_\_\_\_
3. Please list the IIMC Annual Conferences you have attended:
  - Year: \_\_\_\_\_
4. Please list the IIMC Committees you have served on:
  - Committees: \_\_\_\_\_
  - Years: \_\_\_\_\_

#### **Support and Responsibility:**

4. Do you have the full support of your municipality?
  - (  ) Yes
  - (  ) No
5. Do you accept full responsibility for upholding the duties of this office?
  - (  ) Yes
  - (  ) No

#### **Board of Directors Experience:**

6. Have you served on the IIMC Board of Directors?
  - (  ) Yes
  - (  ) No
    - If yes, please specify the position and duration:
      - Position: \_\_\_\_\_ 79 \_\_\_\_\_
      - Dates: \_\_\_\_\_

**Certification:**

I certify that the above information is accurate to the best of my knowledge. I understand that failure to abide by the election policy will result in removal from the ballot.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Attachments:**

- Please attach a recent photograph:
  - must be JPG or PNG files;
  - minimum file size – 250k; maximum file size – 4mb.
- Please attach a 500-word (maximum) biography that includes answers to the following questions to articulate your views and vision for the desired role:
  - What are the key challenges you foresee in this role, and how do you plan to address them?
  - How do you plan to engage with and support the members of IIMC?
  - What initiatives would you propose to enhance the professional development of Municipal Clerks?
  - How would you promote inclusivity and diversity within the organization?
- Letters of support from your municipality.

# IIMC Election Complaint Form

TODAY'S DATE: \_\_\_\_\_

THIS COMPLAINT OCCURRED ON: \_\_\_\_\_

**1. PERSON FILING THE COMPLAINT:**

FULL NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY, STATE & ZIP CODE: \_\_\_\_\_

HOME PHONE: \_\_\_\_\_ WORK PHONE: \_\_\_\_\_ CELL PHONE: \_\_\_\_\_

**2. PERSON ALLEGED TO HAVE COMMITTED AN UNETHICAL ACT:**

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**3. PLEASE PROVIDE NAMES AND CONTACT INFORMATION OF ANY WITNESSES AND/OR COPIES OF EVIDENCE OF THE VIOLATION:**

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**4. DESCRIBE THE ALLEGED VIOLATION INCLUDING ANY SPECIFIC SECTION OF THE ELECTION POLICY VIOLATED:**

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**5. REASON FOR COMPLAINT:** (State specifically the facts that form the basis of your complaint)

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**I ACKNOWLEDGE THAT BY FILING THIS DOCUMENT, I AM ATTESTING THAT ALL THE STATEMENTS AND INFORMATION IN THIS COMPLAINT ARE TRUE AND FACTUAL TO THE BEST OF MY KNOWLEDGE.**

**SIGNATURE**

**PRINT NAME**

**DATE**

(Use additional sheets as necessary)

<b>FOR OFFICIAL USE:</b>	
<b>DATE RECEIVED:</b>	_____
<b>DATE SENT TO THE ELECTION COMMITTEE CHAIR</b>	_____
<b>DATE OF RESPONSE TO COMPLAINANT</b>	_____
<b>DATE OF ELECTION COMMITTEE MEETING</b>	_____
<b>DATE SENT TO IIMC EXECUTIVE BOARD *IF APPLICABLE</b>	_____

## **Forum Questions**

### **Leadership and Experience**

1. What leadership experiences have you had that would help you succeed as Vice President of the IIMC?
2. Can you describe a challenging situation you faced in a leadership role and how you managed it?
3. What motivates you to serve as Vice President, and what do you hope to achieve during your tenure?

### **Vision for the IIMC**

4. What is your vision for the future of the IIMC, and how do you plan to help shape that vision?
5. How would you ensure that the IIMC remains relevant to members from different regions and municipalities of varying sizes?

### **Advocacy and Representation**

7. What steps would you take to ensure the voice of municipal clerks are heard at the national and international levels?
8. How do you plan to represent the interests of smaller municipalities within the IIMC?
9. What strategies will you implement to improve the diversity and inclusion within IIMC's membership?

### **Professional Development**

10. How can the IIMC support the professional development of clerks who are early in their careers?
11. What plans do you have for improving continuing education and certification opportunities for members?
12. How would you facilitate mentorship programs to help new clerks in their professional journey?

### **Collaboration and Partnerships**

13. How would you enhance collaboration between IIMC and other professional organizations?
14. What do you believe is the most important partnership for the IIMC to focus on, and why?

## **Technology and Innovation**

16. What steps would you take to ensure that IIMC members are staying ahead of technological advancements in their roles?

## **Budget and Sustainability**

19. How would you work to ensure the financial health and sustainability of IIMC?
20. What plans do you have for increasing IIMC's revenue streams while maintaining membership fees?

## **Membership Engagement**

21. What are your strategies for attracting new members to IIMC, especially those who may not yet see the value of joining?
22. How would you foster a greater sense of community and interaction among members in different regions?

## **Ethics and Integrity**

23. How would you uphold and promote the ethical standards and integrity of municipal clerks within the IIMC?
24. In what ways would you promote transparency and accountability within IIMC's leadership?

## **Future of the IIMC**

25. What do you think are the biggest challenges facing municipal clerks today, and how would you address them as Vice President?
26. What role do you think IIMC should play in advocating for changes in government policy or procedures?

## Possible Survey Questions

In your opinion, should the President-Elect automatically succeed to President?

- Yes, automatic succession ensures stability
- No, members should vote for the President independently
- Unsure / need more information

Should the Vice President automatically advance to President-Elect?

- Yes
- No, each position should be elected separately
- Unsure

Would you support creating **two Vice President positions** instead of a single Vice President/President-Elect structure?

- Yes
- No

How strongly do you agree or disagree with transferring the Executive Director's election duties to the Elections Committee?

- Strongly agree
- Agree
- Neutral / No opinion
- Disagree
- Strongly disagree

How would you feel about reducing representation to one Director per region to make the Board smaller?

- Strongly support

- Somewhat support
- Neutral / No opinion
- Somewhat oppose
- Strongly oppose

Would you support the election of positions of Secretary and Treasurer, which are currently functions of the Executive Director, which could potentially increase service opportunities for membership?

- Strongly support
- Somewhat support
- Neutral / No opinion
- Somewhat oppose
- Strongly oppose

Do you feel that the current Board structure of IIMC serves you well as a member?

- Yes
- No
- Neutral / No opinion

If not, what about the structure of the Board should be changed?

(This would be an open-ended question.)

**To:** IIMC Board of Directors  
**From:** Angela Richburg, MMC, Chair  
Dyanne Reese, MMC, Vice Chair  
**Date:** October 31, 2025  
**Subject:** Policy Midyear Report – 2025

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Policy Committee: (*Angela Richburg, MMC; Dyanne Reese, MMC; Mary Ann Hess, MMC; Helen Ingold, MMC; Tina Knapp, MMC; Carrie Mugford, MMC; Peter Sass; Dan Weinrib, CMC; Stephen Huycke, CMC; Kathleen Montejo, MMC; Trish Gleason, MMC; Leesa Ross, MMC,*)

## **Revised Social Media Policy (Chapter 1.10) and Executive Session Policy**

### **Recommendation:**

The Policy Committee recommends that the Board of Directors review and accept the following:

1. That the current Social Media Policy (Chapter 1.10) be repealed and replaced with the new Social Media Policy attached to this report.
  - a) That, where appropriate, the elections policies include that posting of campaign material to IIMC social media accounts be limited to candidates during the election period.
  - b) That the Elections Committee consider limiting the number of campaign posts each candidate is permitted to post each week to IIMC social media platforms.
2. That the attached Executive Session Policy be reviewed and adopted

### **Background:**

The Policy Committee established three subcommittees and the following policies were reviewed and/or created: Executive Session Policy, Social Media Policy, and the Board Transparency Policy.

### **Executive Session Subcommittee Update:**

The available members of the Executive Session subcommittee were tasked with reviewing the executive session policy and met on 08/29/25 at 3:00 EST. Each of the recommendations presented by President Abrahamson was considered. The discussion resulted in the following recommended changes to section 5:

1. Recommend removing the word “regular” from the first bullet point to allow an executive session to be called during any type of meeting.
2. Recommend allowing a binding vote to be taken in executive session only if approved by the majority of the board members (currently 28 members). Thereby removing the entirety of the third bullet point and replacing it with: “The Board of Directors may take a binding vote in executive session only when deemed necessary by a majority of the entire Board of Directors”
3. Recommend no change to the second bullet point. The president should announce the reason for entering an executive session. The list of reasons for an executive session in Section 2 is appropriate and encompassing without being overly prescriptive.

### **Social Media Subcommittee Update:**

The Social Media subcommittee held five virtual meetings between July 25 and October 6 , 2025. The subcommittee also exchanged emails while finalizing the proposed policy. Additionally, and as further discussed below, the subcommittee had email communications with the Chair and Vice-Chair of the IIMC Elections Committee due to potential overlap of work. Karen Lee, IIMC’s Director of Communications, was invited to and attended some meeting of the subcommittee to provide expert advice.

## **Discussion:**

Based on the subcommittee's recollection of the May 2025 Board Meeting, the following were key topics of discussion that form the basis of the recommended changes to the social media policy.

- Who should be allowed to post to IIMC's social media pages?
- What should be posted to IIMC's social media pages?
- What is the role of IIMC's social media pages in election campaigns?

In addition to these, the subcommittee discussed:

- How can IIMC and the social media policy support Region Directors use of the Region Facebook pages when the director is not a social media user?
- Ensuring Members are engaged through social media channels
- Increasing activity on IIMC's main Facebook page.

## Purpose of Social

### Media Use

What is the purpose or goal of IIMC's use of social media platforms? This is the fundamental question that helps determine how social media platforms are used, and therefore what the policy should be.

The subcommittee recommends that the policy specifically include the following goals (called 'intended uses') to shape how IIMC uses social media now and in the future:

- (a) **Increased Awareness and Visibility for IIMC** – use social media to increase awareness of IIMC in all its aspects.
- (b) **Member engagement** – use social media to build stronger relations with its members
- (c) **Building Organizational Loyalty and Trust** – social media should increase the IIMC's reputation
- (d) **Humanize IIMC** – demonstrate IIMC is putting the interests of the whole membership first
- (e) **Increase website traffic** – use social media to drive members to the IIMC website for more detailed information on the association's activities, programs, etc.,

These goals provide a purposeful view of how social media can be used to build up the membership, connect the membership, and increase IIMC's value proposition to the members. Subcommittees other recommendations are connected to these goals

### Who can post?

A significant part of the Board's discussion on the use of social media (in particular the IIMC Region Facebook pages) revolved around who should post and what should be posted to IIMC's social media platforms. While most of the Board's discussion centered on election related posts, the subcommittee believes that the challenges observed with election related posts could easily be extended to any non-election related posts. To ensure that the social media platforms are aligned with the above noted purpose, the proposed new social media policy makes the following recommendations:

1. Limiting posting on Region Facebook pages to:
  - (a) Region Directors (or designees for Region Directors that don't use Social Media)
  - (b) Executive Committee Members
  - (c) IIMC Foundation
  - (d) IIMC Staff
  - (e) Candidates (during the election period only complying with election rules such as having posts approved)
2. Limiting posting on the website and social media platforms that are targeted to the entire membership to:
  - (a) IIMC Staff;
  - (b) And Board Members when they are out promoting IIMC

The proposed policy is very clear, based on the included definitions of ‘post’ and ‘comment’, that limiting posting to the above noted persons will still allow the broader membership to actively engage with IIMC by commenting on posts. In other words, Board Members and IIMC staff can increase awareness, build trust and engage members in the activities of IIMC by posting to social media, while IIMC is humanized and the membership is engaged by being allowed to comment on those posts and the comments of other members, all while still ensuring that social media is being used to promote IIMC as an organization.

In respect to candidates for election to the Board of Directors (Vice-president and Region Director) the subcommittee had significant discussion on whether that should or should not be allowed. It is recommended that candidates (and only the candidates themselves) be permitted to campaign on IIMC’s Region Facebook pages during the campaign period only. IIMC’s Region Facebook pages are one of the very few tools that a candidate has to promote themselves and their vision to the membership. Campaigning for the Board does provide visibility to IIMC, does engage members, and is one of the ways that members connect with IIMC. The subcommittee is concerned, however, that allowing significant campaigning on the region Facebook pages, can limit the ability for IIMC to promote other important initiatives during the campaign period. As such, the subcommittee recommends that the Elections Committee and Board consider limiting the number of campaign posts that a Candidate can post to IIMC social media platforms (e.g. two posts per week during the campaign period).

#### What can be posted?

The policy does not specifically state what should be posted to IIMC’s social media pages. This is intentional, because it ensures that the use of social media platforms are able to meet the goals for use in an ever-evolving world. What the proposed policy does, however, provide a Code of Conduct and Posting Guidelines that must be adhered to by those posting and commenting on posts. The Code of Conduct and Posting Guidelines require that:

1. Posts and comments must reflect IIMC’s mission, values, and commitment to professionalism, inclusivity, and ethical leadership.
2. Content shall not include discriminatory, defamatory, harassing, political, or inflammatory language or imagery.
3. No confidential or privileged information shall be posted on any platform.
4. All public statements must be factual, respectful, and avoid speculation or misrepresentation.

#### Supporting Region Directors who Don’t use Social Media, and increasing activity on IIMC’s main Facebook page?

The subcommittee is concerned that current practices don’t support Region Directors with little or no social media experience in promoting IIMC in their regions. Additionally, the subcommittee is concerned that the Region Directors are or may be required to use their personal social media accounts to access IIMC’s social media platforms when they otherwise want to keep those personal pages for non-professional purposes only.

The subcommittee recommended that the policy require assistance to be provided to Region Directors in the use of social media. This could, in the committee’s estimation, include such things as setting up generic Region Director generic Gmail email account (or IIMC email) that can be transferred to incoming Region Directors. This generic email could then be used to establish a Region Director’s Facebook page that could be used to post to the Regions Facebook page. The proposed policy includes requirements to support this approach when possible.

**Board Transparency Subcommittee Update:**

The Board Transparency Subcommittee has not met, but has exchanged emails regarding the policy. As this policy continues to be reviewed and edited, we hope to have it for the May Board meeting.

**Final meeting of the Policy Committee:**

The Policy Committee approved the attached policies for recommendation with the only change being in section 3 of the Executive Session Policy which regards attendance

**Management's Comments:**

We agree with the revisions to the Social Media policy and the adoption of the new Executive Session policy for the Board. However, the Social Media policy doesn't delve into specifics regarding Elections and Campaigning, other than posts must be preapproved. The Elections Committee did not provide any recommendations on this, either. We look forward to a policy on Transparency, especially how it's defined in Board content.

**INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS (IIMC)  
BOARD OF DIRECTORS EXECUTIVE SESSION POLICY**

**Purpose:**

The Executive Session of the IIMC Board of Directors is a confidential meeting segment used to discuss sensitive matters that require privacy and discretion. This policy outlines the procedures, permissible topics, attendance, and confidentiality expectations to ensure that executive sessions are conducted with integrity, in accordance with the organization's Bylaws and fiduciary obligations.

**1. Definition of Executive Session**

An Executive Session is a closed portion of a duly noticed meeting of the IIMC Board of Directors, during which only authorized individuals may be present, and confidential matters are discussed. Authorized individuals are the sworn members of the Board of Director and the follow members of staff at the request of the Board of Directors: Executive Director, IIMC Board Attorney, or Parliamentarian, or Financial Advisors. The session is not open to the public or general membership.

**2. Permissible Topics of Discussion**

Executive Sessions are reserved for the discussion of matters where public disclosure may cause harm to the organization, individual privacy, or contractual integrity. The following topics are appropriate for Executive Session:

- Personnel matters, including performance reviews, evaluations, discipline, complaints, or employment negotiations involving individual employees, contractors, or officers
- Legal issues, including pending or threatened litigation, claims, or disputes
- Confidential contractual negotiations or sensitive financial arrangements
- Ethical complaints or misconduct allegations against Directors, Officers, Members, or Staff
- Strategic risks or crisis management scenarios requiring discretion
- Board education or development
- Any other topic deemed legally confidential or necessary to discuss privately, as determined by the President in consultation with legal counsel
- Any other topic deemed by the majority of the Board to be highly sensitive

**3. Attendance**

Members of the IIMC Board of Directors are entitled to attend Executive Session unless they have a conflict of interest, or a direct or indirect pecuniary interest, in any topic to be discussed in Executive Session. Members of the IIMC Board of Directors who have a conflict of interest, or a direct or indirect pecuniary interest, in any topic to be discussed in Executive Session shall not attend the Executive Session when that topic is discussed. When more than one topic will be discussed in Executive Session, they will normally be discussed in an order that will permit a Member who has a conflict of interest in the matter to be present at the start of the Executive Session.

Other individuals with a direct, relevant interest in the topic under discussion may only attend an Executive Session with the consent of the Board. No other individuals, including general IIMC Members or observers, may be present during Executive Session.

#### **4. Confidentiality and Conduct**

All participants in Executive Session are required to maintain strict confidentiality regarding all discussions, documents, and decisions shared within the session. The following rules apply:

- No minutes of the Executive Session shall be taken or included in the official meeting record, unless required by law. A summary of any action taken will be recorded only if formal action is made in open session.
- No recording or filming of any kind is permitted during Executive Session, whether audio, video, or written transcription.
- **No information** discussed in Executive Session may be disclosed or shared externally (including with IIMC members, staff not present, or the public) until the Board votes to take action in open session or to release information.

Violation of confidentiality constitutes a violation of IIMC's Code of Ethics and may result in disciplinary action, including possible censure or removal, in accordance with IIMC Policy.

#### **5. Procedure and Reporting**

- The Executive Session shall be called by the President, or by majority vote of the Board during a meeting.
- The President shall clearly announce the reason for entering Executive Session and cite the category of business to be discussed (e.g., personnel, legal).
- The Board of Directors may take a binding vote in executive session only when deemed necessary by a majority of the entire Board of Directors
- A summary statement may be read into the record in open session if the Board deems it appropriate.

#### **6. Board Agreement and Acknowledgment**

Each Director shall annually sign an acknowledgment of this policy, affirming their understanding of the rules and their responsibility to protect Executive Session confidentiality.

**Effective Date:**

**Approved by the IIMC Board of Directors on:**

**Policy Review Cycle:** Biennial or as required

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Board of Directors  
**From:** Allison May, PR/Marketing Chair  
**Date:** October 10, 2025  
**Subject:** PR/Marketing Midyear Report -- 2025

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**Background:** PR/Marketing Committee proposes that the Executive Board consider adding a second category for PEGA in 2026 as one part of the celebration of IIMC's 80<sup>th</sup> Anniversary.

**Discussion:** We would like to build on last year's successes and raise the bar on PEGA submissions even further by making PEGA more accessible to all. This could be facilitated by having a category for larger municipalities, say over 75,000 in population, and another category for smaller municipalities with a population under 75,000. All other award criteria would remain the same at the moment.

**Financial:** One additional 2026 IIMC Conference Registration.

**Summary:** The additional category level for PEGA in 2026 would increase excitement around IIMC's 80<sup>th</sup> Anniversary as well as increase accessibility for all municipalities.

### General Reporting:

#### ◆ Highlights & Successes

- **80th Anniversary Logo Contest:** 80+ entries reviewed; final logo approved.
- **Monthly Meetings:** No December or May meetings due to holiday/conference conflicts.
- **News Digest:** Brainstormed features including "80 Fun Facts," conference reflections, clerk privacy legislation, PEGA runner's up.

#### 🎯 Goals & Assignments

- **News Digest Features** - *Lisa Stites* is working on an 80th Anniversary article; *Elizabeth Garcia-Beckford* on a Clerk privacy law feature; *Lindsey Grigg-Moak & Tory Frink* have a draft of a Conference reflections piece; and '25 PEGA runner's up spotlight to be developed.
- **PEGA Award** - *Sharon McFadden, Katie Lewallen, Fiona Buchanan, Allison May*: Review content/applications. *Elizabeth Garcia-Beckford* suggested ramping up outreach to state associations. Committee idea to add small/large municipality award categories.

#### 📌 Next Steps

- Develop and review drafts of News Digest articles & brainstorm Clerk Week Toolkit
- Coordinate PEGA outreach and finalize award categories
- Continue collecting content ideas from IIMC's first 50 years for anniversary features

#### 🎉 Celebrations

- **Lisa Stites:** Honored as 2025 NCAM Clerk of the Year!
- **Tory Frink:** New role as *City Clerk, Legislative Department, City of Greensboro, NC*

### Management's Comments:

The PR/Marketing Committee has done an excellent job of promoting IIMC and its Program Awards, especially the Program Excellence. This past Fall, their direction and coordination of creating a contest among members regarding an IIMC 80<sup>th</sup> Anniversary logo generated interest, engagement and produced an aesthetically pleasing logo to use for the Conference in Reno. Region VIII – EAST Director Julie Barnett was the winner. We agree with the new PEGA category regarding population. If it generates interest, we can make it a permanent category for future years. NOTE: This will have an impact on the conference budget since the winner will receive a complimentary conference registration, making the total of complimentary conference registrations for award winners three instead of the current two.

**To:** IIMC Board of Directors

**From:** Sheri Pierce, MMC, Budget and Planning Committee Chair

**Date:** October 17, 2025

**Subject:** Budget & Planning Midyear Report - 2025

### **Call to Order**

Chair Sheri Pierce, MMC, called the Budget Committee meeting to order at 9:19am.

### **Roll Call**

Committee Members Present: President Dawn Abrahamson, MMC; President Elect Lee Frazier, MMC; Vice President Janice Bates, MMC; Immediate Past-President Lisa Garcia, MMC; Board Liaison Stephen Huycke, CMC; Board Liaison Leesa Ross, MMC; Budget Chair Pierce, MMC; Budget Vice-Chair Kimberly Hoesing, CMC and Member At-Large Angela Johnson, MMC.

IIMC Staff Present: Executive Director Chris Shalby, Finance Specialist Shannon Kane and Office Manager Janet Pantaleon.

**Approval of Agenda** - The Committee approved the agenda as presented.

### **2025-2026 – Committee Goals and Objectives.**

The committee reviewed and agreed to the Budget and Planning Committee 2025-2026 Goals and Objectives as presented.

### **Policy Review**

The committee reviewed the Revenue and Finance Policy, Budget and Planning Policy, and Budget Committee Appointment Policy.

Recommendation: The Budget Committee suggested several amendments to Section 2.35.080 – Budget and Planning Policy related to existing repetitive or conflicting language. By unanimous consent, a clean re-write of this section has been submitted to Director Shalby and President Abrahamson for consideration by the Board of Directors.

### **Reports**

The Committee reviewed and accepted the following reports with comments:

- 2025 Year End Budget
- 2024 Auditors Status Letter/Financial Statement
  - Director Shalby reported that the auditors have confirmed that a full audit is not legally required for IIMC, nor do they believe it to be necessary at this time. Given the consistent financial savings and clean history, they recommended that we continue with a compilation of the financial statements.

- 2026-2031 5-Year Capital Expense
  - Vice President Janice Bates requested that a note be added stating that these items are a place holder and not necessarily to be used in each year. Note will now read:
    - *Certain capital expense items are included on an annual basis as recurring allocations. These allocations may not result in an expenditure within the respective fiscal year but are retained for continuity and future readiness.*
- 2025 Year-End Budget Notes
  - Finance Specialist Kane provided a verbal recap of 2025 and reported anticipated year-end profit in the amount of \$7,871.00.
  - Review of the Annual Conference Loss
 

Ms. Kane pointed out that expenses associated with the Board of Directors alone were \$47,000.00. Immediate Past President Garcia commented that at other conferences she had attended, Board members and guests were only allotted 2 or 3 drink tickets, and cash bars versus open bars were standard practice for the entire week of a conference. Director Shalby stated that expenses could be reduced significantly by serving a continental breakfast at the annual business meeting rather than a full breakfast. Vice President Bates suggested combining some evening board functions into one.

## **2026 Budget Overview**

Chair Pierce asked Finance Specialist Kane to provide an overview of the management's notes submitted to the Committee with the agenda.

Director Shalby pointed out that the 2026 budget is projected to end in the positive amount of \$42,728. He stated that IIMC has acquired a new sponsor, Televic, that will bring in an additional \$12,500 to add to the bottom line. He will also be looking at funding for an additional part-time staff member to assist with Marketing and Communications.

## **2026 Budget Overview – Managements Notes/ACTION ITEMS.**

Director Shalby and Finance Specialist Shannon Kane presented the following for discussion and action by the Committee:

1. 5% COLA Increase in Staff Salaries (excluding Executive Director)

The Committee discussed how the current California CPI of 3.5% should be used as a factor when considering cost-of-living adjustments in staff salaries. Executive Director Shalby communicated his desire to combine the current California CPI of 3.5% along with a merit-based increase of 1.5% to provide a 5% increase in salaries for employees.

**MOTION:** Committee Member Huycke moved, second by Committee Member Frazier, to recommend a 3.5 percent COLA based on current CPI, and a merit-based increase in the amount of 1.5 percent, for a 5% total increase in employee salaries.

## **MOTION CARRIED UNANIMOUSLY.**

2. Provide Funding for Region X Consultant in the Amount of \$5,000

Due to the size and diversity of Region X, Director Shalby recommended hiring a consultant to assist with representation and recruitment, such is the current practice in Region XI.

**MOTION:** Committee Member Huycke moved, second by Committee Member Abrahamson, to approve funding for a Region X consultant in the amount of \$5,000.

**MOTION CARRIED UNANIMOUSLY.**

3. Increase Conference Delegation Registration in the Amount of \$50.00.

The committee received a detailed report from Finance Specialist Shannon Kane regarding conference revenues and expenditures. The Committee expressed support for the previous cost-saving measures discussed during reports. It was pointed out by Ms. Kane that although these measures could help, they will not offset the substantial increase in audio-visual and food/beverage costs which continue to rise.

Executive Director Shalby stated another cost saving measure would be eliminating Board Development from the annual conference and keeping it to the Mid-year Board Meeting. This would eliminate the expense of two room nights as well as the general costs associated with holding board development at the annual conference.

**MOTION:** Committee member Johnson moved, second by Committee member Frazier, to recommend a \$50.00 increase in conference registration beginning in 2026.

**MOTION CARRIED UNANIMOUSLY.**

4. Allocate \$30,000 to the Futures Committee for In-Person Meeting at IIMC Headquarters

Director Shalby explained that the Futures Committee planned to hold an in-person meeting at IIMC Headquarters. The estimated cost for travel and meals for 15 members, including two members of the Ideals Group, is approximately \$30,000. The Committee asked Director Shalby if it was crucial this committee meet in person. After discussion, it was suggested by Director Ross that the meeting be held at the annual conference in Reno to eliminate this expense. Following discussion, the Committee recommendation is as follows:

It was unanimously agreed that to save this cost, the Futures Committee would meet in-person during the 2026 IIMC conference. Director Shalby recommended, and the committee agreed, that since this amount is currently reflected in the 2026 budget, the amount of \$30,000 would be transferred to the Communications line item to assist in hiring a part-time staff member for the Marketing and Communications department when full funding becomes available.

**Staff Acknowledgment**

The committee thanked IIMC staff for their continued due diligence in practicing cost saving measures, and for providing comprehensive reports and detailed information to the committee.

There being no further business, the meeting adjourned at 2:45 pm.

**Management's Comments:** We recommend that the Board accept all of the Committee's recommendations. The majority of these topics have been discussed prior to this report's presentation, however, we appreciate the consensus from the Committee.

The Budget Policy revision now coincides with the Board approved process.

The Futures Committee will now be meeting at the Conference in Reno.

## 2.35.080

### Budget and Planning

The Budget and Planning Committee shall serve as the financial advisory committee to the Board of Directors. The Committee shall, along with the Executive Director, present the annual budget to the Board, review quarterly reports, review the audited financial statements and report to the Board any areas of concern.

The Budget and Planning Committee shall be a standing committee consisting of nine members including: Four executive board members, two current board members as Board Liaisons, and three members at large with an MMC designation and a financial background.

IIMC President,  
IIMC President Elect  
IIMC Vice President  
IIMC Immediate Past President  
Two Board Liaisons (By application and selected by IIMC President)  
Chairman – member at-large  
Vice Chairman – member at-large  
Member – member at-large

The Executive Director shall attend all Committee meetings and participate as a nonvoting member.

**Members At-Large Term.** Members at-large shall serve a three-year term, automatically progressing through the positions of the Budget & Planning Committee - Member, Vice Chair and Chair.

**Qualifications and Selection of Members - At large.** Qualifications to serve as a Member at-large on the Budget Committee shall include the following:

1. Applicant must have a budget/financial background.
2. Applicant must be a member of IIMC for five or more years.
3. Applicant must hold a MMC designation.
4. Applicant shall not have served previously as an At-large member of the Budget and Planning Committee.

**Vacancies.** No later than June 1 of each year, the Executive Director will announce vacancies and solicit applications to serve as an At-Large member on the Budget and Planning Committee. The Director shall accept and retain qualified applications on behalf of the President. The President shall review and submit a summary of the applicants' qualifications to the Board of Directors for appointment to the Budget and Planning Committee.

**Budget Committee Board Liaison.** Each year the President shall appoint two members of the Board of Directors to serve on the committee for the current budget year.

**(May 22, 2024; January 28, 2023. May 20, 2017; November 23, 2013; May 18, 2009; May 16, 2008; May 21, 2007; March 8, 2007; October 27, 2006; November 12, 2005; December 4, 2004; May 22, 2004; December 6, 2002; September 2002. Policy B-1].**



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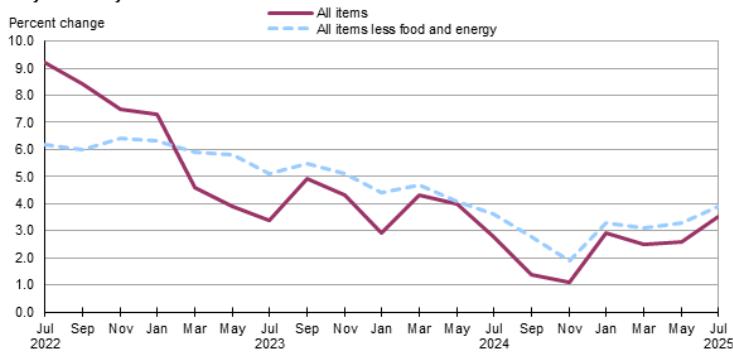
### Consumer Price Index, Riverside Area — July 2025

**Area prices were up 0.2 percent over the past two months, up 3.5 percent from a year ago**

The Consumer Price Index for All Urban Consumers (CPI-U) for Riverside-San Bernardino-Ontario advanced 0.2 percent for the two months ending in July 2025, the U.S. Bureau of Labor Statistics reported today. Regional Commissioner Chris Rosenlund noted that the index for all items less food and energy advanced 0.8 percent during the two-month period. The food index decreased 0.1 percent, and the energy index declined 5.3 percent. (Data in this report are not seasonally adjusted. Accordingly, bi-monthly changes may reflect seasonal influences.)

The Riverside area all items CPI-U increased 3.5 percent for the 12 months ending in July. The index for all items less food and energy increased 3.9 percent over the year. The food index rose 3.5 percent, while energy index declined 1.8 percent.

**Chart 1. Over-the-year percent change in CPI-U, Riverside-San Bernardino-Ontario, CA, July 2022–July 2025**



Source: U.S. Bureau of Labor Statistics.

[View Chart Data](#)

#### Food

The food index decreased 0.1 percent for the two months ending in July. The index for food at home (grocery store purchases) declined 0.2 percent. The food away from home index (restaurant, cafeteria, and vending purchases) was unchanged for the same period.

The food index increased 3.5 percent over the year. The food at home index rose 2.1 percent. The food away from home index advanced 5.4 percent.

#### Energy

The energy index declined 5.3 percent for the two months ending in July. Gasoline prices decreased 5.5 percent.

The energy index decreased 1.8 percent over the year. Gasoline prices fell 5.2 percent.

#### All items less food and energy

The index for all items less food and energy advanced 0.8 percent during the two-month period. Among the index's components, prices were higher for medical care (+5.4 percent) and shelter (+0.8 percent). In contrast, prices were lower for apparel (-5.1 percent) and education and communication (-1.2 percent).

The index for all items less food and energy increased 3.9 percent over the year, reflecting higher prices for medical care (+6.8 percent) and shelter (+3.4 percent). In contrast, prices were lower for education and communication (-2.8 percent).

**Table A. Riverside-San Bernardino-Ontario, CA, CPI-U 2-month and 12-month percent changes, all items index, not seasonally adjusted**

Month	2021		2022		2023		2024		2025	
	2-month	12-month								
January	0.9	2.2	1.5	8.6	1.3	7.3	0.0	2.9	1.8	2.9
March	1.3	3.6	2.7	10.0	0.0	4.6	1.4	4.3	1.0	2.5
May	2.0	5.9	1.4	9.4	0.8	3.9	0.6	4.0	0.7	2.6
July	1.3	6.5	1.1	9.2	0.6	3.4	-0.6	2.8	0.2	3.5
September	0.8	6.8	0.0	8.4	1.4	4.9	0.0	1.4		
November	1.4	7.9	0.6	7.5	0.0	4.3	-0.2	1.1		

**The September 2025 Consumer Price Index for the Riverside area is scheduled to be released on October 15, 2025.**

#### Changes to the CPI

With this release, BLS has replaced survey data collected for the CPI's wireless telephone services index with secondary source data

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Budget & Planning Committee  
**From:** Chris Shalby, Executive Director  
Shannon Kane, Financial Specialist  
**Date:** August 18, 2025  
**Subject:** 2025 Projected Year-End Budget Notes

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The 2025 Year End projected budget is anticipated to end with a profit of **\$7,871**. This is a decrease from our initial projection of **\$65,715**. There are several reasons attributed to the positive year-end bottom line:

1. **Education** – Online sessions have met projections;
2. **Membership** – Is expected to meet or exceed projections for 2025;
3. **2025 Annual Conference** -- incurred an overall loss of \$115,025 of which \$99,000 is attributed to the Conference Planner Salary.
4. **Administration/Building Income** – Nearly \$80,000 in revenue generated from earnings on investments.

**However, between now and year-end 2025, we may be able to increase the bottom line further, pending we exceed membership and education online revenue, Executive Committee travel will realize budget or a savings, midyear meeting staff travel will be reduced with Board meeting in Ontario, CA.**

**Our Board Designated Reserves are invested with the firm of Urban Wealth Management – see attached Charles Schwab statements for month-end July 31, 2025, for reference.**

### STAFF

All Departments are operating efficiently. We have 10 full-time staff and one part-timer. We have four independent contractors: International, Parliamentarian, IT, and Event Management.

### COMMITTEES

#### Executive Committee

The EC travel budget will either meet projections or come in under due to less travel between now and end of year, 2025. It's highly possible this line item could improve by year-end, pending actual trips taken. Association conference invitations have increased. Major travel to date will be: SLCC Conference in the UK in October and LGMA in British Columbia in October. For the past 17 or more years, this line item has shown that the Executive Committee's commitment to adhere to a strategic and Board approved travel policy, employing Region Directors to represent the President, as much as possible, has kept IIMC's EC travel budget consistent.

#### Board of Directors – General

This area will be more than projected by approximately \$7,500, due to attorney fees.

## 2025 Projected YE Notes – Page 2

### Other Committees

Other Committees are expected to meet budget.

### 2025 Conference – St. Louis, MO

We projected 650 Delegates/25 guests for the 2025 Conference and a projected loss of \$1,805. The average attendance numbers from Conferences in 2016, 2017, 2018, 2019, 2022 and 2023 is approximately 666 delegates. St. Louis' attracted 720 delegates, increasing revenue but also adding to the expense side regarding food and beverage.

\*\*\*The projected loss is due to the following: 1) food and beverage costs continue to rise; and, in 2025, we spent \$318,727 of Food and Beverage, of which \$46,900 was strictly for Board functions; 2) audio visual future costs are now static at approximately \$100,000. Staff will continue to research ways of reducing costs but the reality is that IIMC subsidizes approximately \$157 per attendee while trying to maintain registration costs to a minimum. Eliminating the printed program could help, too.

### Hotel Room Block/Costs

The Host Hotel -- **Hyatt 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 exceeded that figure to eliminate attrition.

Our Secondary Hotel, the Drury, also met the minimum number of additional rooms, also eliminating attrition.

### Rebates/Commissions Maximum

We received a 10% commission from the Hyatt, totaling \$44,655 that was divided between IIMC and YES (65% IIMC - 35% YES) with IIMC retaining \$29,025 out of the initial projection of \$25,911.

### Education

One of the more salient revenue-generating areas and a reason why IIMC is positive on its year-end, has been the Department's overall success in its online courses. In 2024, online courses had a total revenue of \$151,674. This year, we are anticipating similar revenue of nearly \$150,000.

Dr. Rodriguez has been with us for four years, immersing herself in all education initiatives including the completion and launch of the EPP education program. She has developed relationships with IIMC Institutes, embellished existing programs, and created new ones, as evident by the department's revenue generating online sessions this year.

IIMC continues to offer its online courses under Dr. Rodriguez' direction. She also developed a program in collaboration with NaCO and is still working with Captus Press, uploading professional development webinars to the existing online platform for those members who require nominal points to finish their designations. We currently have more than 20 IIMC owned courses online and will be looking to develop additional long-term courses in the future.

Dr. Jai Ulrich has been with us for three and a half years, overseeing the annual conference education program, Athenian Dialogues and the Certification Programs, both CMC and MMC. Her work and fresh ideas have created a streamlined approach to certification. Dr. Jai has also been a popular request from Association requiring IIMC sessions and certification Q & A at their conferences.

Iris Hill, who has been with IIMC for six plus years, is greatly involved assisting Drs. Rodriguez and Ulrich with the certification process, online courses, Athenian Dialogues and other areas of education.

### **Marketing/Communications**

It's been 17 years since the *News Digest* has functioned as an on-line E-zine. IIMC has realized more than \$1 million in savings these past years by not printing and mailing a monthly edition. The on-line magazine allows IIMC expediency in delivery and does not rely on advertising to help pay for costs toward printing hard issues.

We don't expect to see a return from advertisers. The bulk of the advertisers pay a portion of their advertising through sponsorship agreements and/or vendor participation. Those who continue to advertise are given more flexibility to negotiate costs amenable to their budgets and business.

Communications Officer Karen Lee continues to oversee all things on our website and media platform. She also creates and coordinates the E-briefings, monthly online *News Digest* and does an excellent job working with Region Directors on their Region newsletters and other outreach events. The Communications Department focuses on no- to low-cost solutions and strategies for the bulk of its operations.

### **Membership**

IIMC's membership numbers in Region I through X remain consistent. Region XI is under the bulk membership scheme. SLCC, ADSO, VvG and IMASA each pay a fee of \$2,000 with IMASA paying \$250. We have seen growth in our Deputy Membership since 2015 and it took a large leap in 2023. Retired Members remain over 500. Our previous Inactive 2 Active Member Drive, which began in 2017, and ended in early 2022, brought in 365 new members. Of the 365 new members, over half are still active. Many of these new members kept their membership for one to two years prior to leaving their positions, transferred to different departments, were let go or resigned.

IIMC does not want to lose members. We do offer lower dues fees to those that contact us to let us know they do not have the funds to pay their dues. In the past two years, we have assisted nine members so they may remain with IIMC while working toward their certification.

We began the 2023-2024 Member Drive with the first marketing letter going out in December 2022. We've continued with the campaign. As of this report, we have nearly 400 new members and are expecting this number to increase. We continue to add to the list when we know a

## **2025 Projected YE Notes – Page 4**

municipality has lost their City Clerk or Deputy. With the ebb and flow of our membership, this list continues to be a member drive list for the future.

The 2025 membership revenue is expected to end the year at \$1,580,000, meeting the projected budget. There is still the possibility of increasing this number by year-end.

### **Management's Comments/Recommendation:**

The 2025 budget will result in a positive bottom line. A good portion of year-end's success is attributed to the Membership meeting, if not exceeding, projections and the Education Department's highly attended online courses and IIMC's earnings from its investments.

We do not have any other recommendations for 2025. We recommend that the Committee accept the projected 2025 financials as presented, optimistic there is the possibility of growing the bottom line as year-end comes to a close.

**INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS**

**To:** IIMC Budget & Planning Committee

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

**Date:** September 30, 2025

**Subject:** 2026 Budget Overview - Management's Notes



The 2026 budget is projected to end the year with a revenue of **\$42,728**. Other than membership revenue and Education online courses, IIMC counts on Conference monies to grow its annual budget and reserves. Going into the 2026 fiscal year, IIMC will experience a small deficit in the 2026 Conference. Based on the 2025 Conference, IIMC will continue to subsidize each Delegate between \$35 and \$135 depending on discounts, and high costs of Food and Beverage and Audio Visual. IIMC continues to provide delegates with the utmost in a conference experience; however, our fees remain below the national average for associations similar to IIMC: ICMA is \$810EB and NLC is \$1,000. At the end of this report, we are recommending the following:

- **3.5% COLA increase + 1.5% Merit increase for all staff salaries (excluding ED) (included in the 2026 budget)**
- **\$50 increase in Conference Delegate Registration (included in the 2026 budget)**
- **\$5,000 for Region X Consultant (included in the 2026 budget)**
- **\$30,000 for part time Communications staff/contractor (NOT included in the 2026 budget)**

**Management's Comments**

We follow established procedures on finances and try to anticipate and resolve potential problems while providing the Organization with excellent resources. The following areas and departments highlight points for information and discussion:

**Board Designated Reserves** - IIMC built its Board Designated Reserves to the more than \$1 million it currently has through the following: realizing the salary of a Communications/Marketing Coordinator position (vacant 2014 to March 2020); revenue generating conferences in 2012, 2013, 2014, 2016, 2017, 2018, 2019 and 2022; successful membership campaigns (2012 – 2015 and 2017 – 2019 and up to 2025); eliminating the costs of publishing a monthly magazine (since 2009) and creating an online E-zine; cost cutting measures in operations; refinancing headquarters' building (2020); two fully leased office rentals; and overall diligence by staff and Board. Pending future annual conferences and how the impending environment of our membership unfolds, IIMC has placed itself in a prime position to maintain its current level of service to its membership while researching new methods of improving its existing operations. We are in this position financially because of strict adherence to policies over the years. We need to continue being vigilant in following the policies and processes regarding our finances.

## 2026 Budget Notes – Page 2

### Revenue Generation

Creating new revenue streams is always on the horizon, albeit it is somewhat vertical in what is offered: IIMC's Education Department continues to develop online courses that are attractive to members. Online courses in 2024 and 2025 have helped a positive bottom line. They are low in cost, popular and provide small rebates. Our only fundraiser – Annual Conferences – generates additional revenue from attendance, sponsors and exhibit programs.

The main concerns moving forward are the consolidations taking place with our Conference sponsors. We've already witnessed three sponsors who were with us in 2022, no longer in existence with mergers. The consolidations will hurt IIMC's sponsorship revenue since we could be dealing with fewer independent companies. We continue to be in constant negotiations with the existing sponsors, searching for new and creative ways to increase their contributions by providing them with flexible marketing opportunities. In 2025, we had 10 sponsors at our conference. Management has reached out to those 10 sponsors for 2026 and has received verbal commitments from all of them for either the same donations or slightly more. We have secured a new sponsor – Televic- for additional revenue for 2025 and the 2026 conference.

The Education Department continues to aid in revenue accountability via the creation of wholly owned IIMC online courses and the CMC and MMC applications. The "Education P.L.U.S. Program," launched in 2023, could be another small, but income-generating program. Although our focus on these online programs is first and foremost to provide education and professional development for IIMC members, gaining additional revenue is always a plus.

### IIMC-OWNED VIRTUAL PROGRAMS

In the past three years, IIMC has realized that virtual online education sessions are beneficial to all members and IIMC - regarding costs and availability to members and revenue to IIMC. IIMC has produced its own virtual quarterly education webinars at a low cost to members, providing IIMC with another avenue to increase revenue. Our goal is to provide accessibility and equity regarding these types of future programs. Members are constantly encouraged to attend Institutes to receive the bulk of their education.

### ADMINISTRATION

Administrative Coordinator Marlena Hernandez began full-time in September 2023, providing service in a variety of areas including accounts receivables on top of daily administrative responsibilities. She also works on the Conference Opening Ceremony and in other aspects of the conference. Janet Pantaleon is IIMC's full-time Administrative Manager/Human Resources Representative. Janet also coordinates the Opening Ceremony at the Conference. Part-timer Shannon Kane has been with IIMC for more two years and oversees and handles finance and has brought her nonprofit financial background to the department. Having Shannon has allowed us to eliminate Connie Parker's role as our financial consultant. Connie is available now on an as needed basis. All in all, Shannon is a major asset to IIMC regarding our financial oversight and nonprofit compliance.

## **BUILDING RECAP**

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 one. 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 will generate approximately \$5,734 in monthly income. IIMC's monthly mortgage is approximately \$2,900, leaving IIMC with a windfall of \$2,834.

## **COMMITTEES**

Committees communicate primarily via virtual meetings, at no cost to IIMC. As for new Technical Bulletins, we are not anticipating any for 2026. However, we kept the \$1,500 request in the Records Management Committee's budget in case we move forward with revising current publications.

**NOTE #1:** In 2025, the **Public Relations/Marketing Committee** has requested providing IIMC award winners one complimentary registration to the conference: PEGA and QUILL awards. Depending on how many winners, this ranges from two to five complimentary registrations annually. We awarded three in 2025, one for PEGA and two for the Quill winners.

## **CONFERENCE – 5-Day Conference**

### **2026 Conference – Reno, Nevada**

We are projecting 720 Delegates/25 guests for the 2026 Conference and a projected deficit of (\$1,775). The average attendance numbers from Conferences in 2018, 2019, 2022 and 2023 is approximately 666 delegates. St. Louis attracted approximately 730 delegates. Reno is an attraction, with Lake Tahoe less than one hour away. Also, Region 8 East and West have approximately 1,300 members from which to attract.

\*\*\*Bear in mind that a large turnout is not necessarily a guarantee in a positive bottom line. Costs continue to increase in the following: 1); overall speaker costs; 2) food and beverage costs continue to rise; 3) exhibit hall fees; and 4) audio visual continues to remain high. Staff will look to find ways of reducing costs prior to and during the conference. A reduction in the size of the printed program could help, too.

**NOTE: We are recommending a \$50 increase to the Delegate registration fee for 2026.  
(Approved via E-vote on 10/17/25)**

Reno offers plenty for Delegates and guests. Airlift is available from anywhere in the world and it is approximately a 15-minute ride from the airport to the host hotel – complimentary shuttle to and from the Peppermill is available. We are in one hotel, the Peppermill which will house attendees and all education sessions, exhibit hall, general sessions, and meetings. The All-Conference Event will be held at the Hotel. Here are areas that we believe will make Reno an attractive conference:

1. Host Hotel – houses all delegates. Overflow hotel will be determined if the need arises;
2. The opportunity of adding vacation to a conference may attract more delegates; and

## 2026 Budget Notes – Page 4

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

The Host Hotel -- **Peppermill Hotel** -- \$150/night for single and double; with sales tax (13%) and 70% attrition. We have a total of 3,675 rooms contracted and will need 2,573 accumulative to avoid attrition.

If the number of conference registrations increases, we will need an overflow hotel and meeting rooms. Right now, the plan is to wait and see where we are before acquiring more rooms.

**NOTE:** We will not be adding a second hotel until we are guaranteed that the Host hotel is truly sold out. We've had numerous members in the past "hold" several rooms providing the impression that the rooms have been sold, only to discover that the individual did not attend. A loss of promised rooms leads to attrition. We minimized risk in 2025 by requiring the host hotel to include a one night's penalty upon a guest's cancellation regardless of when/why the cancellation occurs. We will ask the Host Hotel for a similar arrangement. **Also, we will block a group of rooms for the Board of Directors, but each Director will need to make his or her own arrangement regarding payments and finalizing his or her travel dates.** For 2025, this arrangement worked well and expedited the final invoice since individuals took care of their own expenses at that time. IIMC will reimburse the Board for the two nights' stay after the conference.

\*\*All Board meetings, education, general sessions, exhibit hall, lunches, refreshment breaks, opening ceremony, all-conference event, annual banquet and ABM will be in the Peppermill.

**NOTE#1** – We need to discuss the costs of holding Board Development prior to the conference; food and beverage for Board meals; and cost of alcohol for board receptions. In 2025, we spent approximately \$50,000 for the above.

### **Conference Delegate/Guest Registration Fees - 2026**

The current fees are \$800 early bird for Delegates and \$265 for Guests.

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

**The Early Bird will be Friday, March 13, 2026, 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.

The Early Bird fee will be \$800.

- **After Early Bird** - March 14, 2026 – cost will be \$850. 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.

**Early Bird Package/Marketing – Recommended for 2026 Conference**

- The preliminary program will be online in late 2025;
- The Education program will be part of the online registration process, with Delegates being able to choose their concurrent education sessions (tracks) prior to the conference;
- Hotel online reservations will be available to members in November/December 2025;
- The Conference Grant application period are September – November and recipients will be selected by the Board in early December; and
- We will promote this conference as a potential opportunity to earn 12 education points based on completing an assessment for each session attended.

**Rebates/Commissions Maximum**

The Peppermill 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):**

- Peppermill Hotel      \$53,825

**Areas to note for Reno include:**

- Cities may be reluctant to pay conference travel; thus, having an impact on overall attendance.
- Food and beverage can exceed \$200,000 and there is no required minimum. In 2025, we spent more than \$300,000 in F&B.
- No outlook on Delegates' apprehensions about travel;
- It is in a region with approximately 1,300 IIMC members and less than 100 in Nevada;
- Overflow hotel, if needed, can provide a small number of rooms; however, cost may be considerably higher than the host hotels.
- There is no meeting space cost.

**Recommended Discounts and Savings**

We will offer a flat price (discount included) of \$460US to Region X (Canada). Region XI already receives a discounted conference rate of \$395US. We have found the Region discount programs work well. In 2025, we had 175 members from the discounted region attend St. Louis. Our discount program has been in operation for the past eleven years and has always been a positive source of marketing and attendance.

Other discount programs that Management recommends continuing in 2026 include:

- Academy sessions are \$159 regardless of registering for one or more. We had 170 registered for the Academies in 2025. We will have four Athenian Dialogues at \$110 per Dialogue. We believe these fees will do well to attract delegates.
- Offer a \$50 discount for a First Timer and/or Region VIII – East and West delegates.
- Offer a one-year complimentary membership to Nevada Clerks who have never been IIMC members and that are registering for the conference for the first time.

## **EDUCATION**

The Department operates efficiently and has been consistent in meeting members' educational needs and staying abreast of education guideline improvements, especially in our current environment. Dr. Bea Rodriguez continues to immerse herself in IIMC's Education programs. Dr. Jaimis "Jai" Ulrich joined IIMC in March 2022 and provides IIMC with an education background and perspective on DEI and is certified in Collaborative Institutional Training Initiatives. Dr. Ulrich oversees the logistical duties of planning the Annual Conference education program including the acquisition of speakers. Dr. Ulrich reviews CMC and MMC applications, Athenian Dialogues, Athenian facilitator and book approval processes. Education Coordinator, Iris Hill, adds support to both Dr. Rodriguez and Dr. Ulrich in numerous ways. Iris supports in all CMC and MMC implementation processes including the distribution of member certificates and pins. She also supports the PDP program as a point of contact and zoom facilitator during each webinar. Additionally, Iris serves as a CMC and MMC education counselor, servicing members daily to help guide them on their path to the CMC and MMC certification. She continues her own professional development through education programs and training to be an educational resource for our IIMC members.

## **MARKETING**

Our *News Digest* advertising dollars continue to slip away as many of our advertisers have lost business. However, we continue to sell advertising when possible and seek opportunities for advertisers to promote themselves in ways that also benefit IIMC members (e.g., webinars, articles). Advertising dollars for a magazine that is totally on-line results in bottom-line revenue.

Publishing an on-line *Digest* allows us the flexibility to negotiate advertising costs since IIMC does not incur any significant costs to produce (\$300/month for design) the Digest. Advertisers are also featured on the IIMC website in their respective sponsorship levels.

## **MEMBERSHIP**

We are projecting membership numbers to be \$1,582,200 for 2026. Based on what we will realize for year-end 2025, we believe the 2026 membership projections, with a slight increase, are still conservative but attainable.

The department has taken measures to ensure continuity of IIMC's 14,980 membership base, primarily by concentrating on personal contact with members who are close to losing their membership, utilizing the IIMC education opportunities through Virtual Institutes and easy access to online learning and continuous promotion to recruit new members. We are acutely aware of budget constraints and we're using our monthly E-Briefings to promote IIMC services, member engagement, education and features. We are also employing the Board in recruiting efforts with the Region Director Challenge.

The Department has made more of a concerted effort to contact members via phone or email to help secure dues and make the members aware of the benefits of their membership. Janis Daudt, Tammy Storrie and Stephanie Galarza, who joined us in March 2024, continue to be the main points of contact with our members.

**NOTE:** We will continue in 2026 with the Member Drive that we began in 2022, optimistic that we can build on the 500 new members acquired in the previous 12 months. Also, beginning in

## **2026 Budget Notes – Page 7**

October 2025, member dues renewals will be via online, saving IIMC postage, printing and handling costs, thus helping the overall bottom line.

### **2026 Membership Dues**

In 2024, IIMC increased membership dues by \$10.00. IIMC Policy states that we are to present member dues increases to the IIMC Board every two years. Therefore, we are not recommending a dues increase for 2026. We will make that recommendation going into the 2027 budget year.

### **Management's Recommendations:**

We recommend that the Budget and Planning Committee accept our recommendations toward the projected 2026 budget, knowing that staff will be constant in trying to find ways to reduce costs and increase revenue by year-end 2026. The following are recommendations for the 2026 budget.

- **3.5% COLA increase + 1.5% Merit increase for all staff salaries (excluding ED) (included in the 2026 budget)**
- **\$50 increase in Conference Delegate Registration (included in the 2026 budget) – Increased approved via E-vote (10/17/25)**
- **\$5,000 for Region X Consultant (included in the 2026 budget)**
- **\$30,000 for part time Communications staff/contractor (NOT included in the 2026 budget). Management will need to find funding for this position in 2026.**

**IIMC Financials**  
**2026 Budget - DRAFT**  
**SUMMARY TOTALS**

	2022	2023	2024	2025	2025	2025	2026
Description	Actual Year End	Actual Year End	Actual Year End	Budget	Actual YTD as of June 2025	Projected Year End	Budget
<b>INCOME:</b>							
Administration	6,402	55,513	112,752	60,000	73,475	80,000	80,000
Building	51,380	63,162	65,987	68,820	34,406	68,820	68,820
Conference	514,318	547,505	566,778	630,136	641,876	641,876	703,775
Education	203,552	404,133	303,896	423,300	235,032	423,300	295,000
Marketing	30,150	32,791	30,693	29,250	12,602	29,250	29,250
Membership	1,353,519	1,439,367	1,496,618	1,580,000	830,094	1,580,000	1,582,200
<b>Total Income</b>	<b>2,159,322</b>	<b>2,542,472</b>	<b>2,576,725</b>	<b>2,791,506</b>	<b>1,827,485</b>	<b>2,823,246</b>	<b>2,759,045</b>
<b>EXPENSES:</b>							
Administration	531,874	573,294	628,153	651,136	282,471	603,136	634,344
Building	122,080	137,937	165,356	128,134	65,730	128,134	136,336
Committee - Board of Directors	67,823	186,250	168,800	138,000	57,726	138,000	152,800
Committee - Executive	26,624	21,824	28,962	33,400	9,843	33,400	33,400
Committees - Other	13,479	13,148	17,433	30,700	26,124	43,324	17,200
Conference	493,639	689,328	670,414	631,941	699,544	756,901	705,550
Education	318,261	420,559	371,063	576,883	263,214	576,883	490,762
Marketing	157,088	146,107	161,233	170,154	79,692	170,154	173,575
Membership	240,468	281,827	325,498	365,443	172,047	365,443	372,350
<b>Total Expense</b>	<b>1,971,335</b>	<b>2,470,274</b>	<b>2,536,912</b>	<b>2,725,791</b>	<b>1,656,390</b>	<b>2,815,374</b>	<b>2,716,317</b>
<b>PROFIT/(LOSS)</b>							
Administration	(525,472)	(517,781)	(515,401)	(591,136)	(208,996)	(523,136)	(554,344)
Building	(70,700)	(74,775)	(99,368)	(59,314)	(31,324)	(59,314)	(67,516)
Board of Directors	(67,823)	(186,250)	(168,800)	(138,000)	(57,726)	(138,000)	(152,800)
Committee - Executive	(26,624)	(21,824)	(28,962)	(33,400)	(9,843)	(33,400)	(33,400)
Committees - Other	(13,479)	(13,148)	(17,433)	(30,700)	(26,124)	(43,324)	(17,200)
Conference	20,679	(141,823)	(103,636)	(1,805)	(57,668)	(115,025)	(1,775)
Education	(114,708)	(16,426)	(67,167)	(153,583)	(28,181)	(153,583)	(195,762)
Marketing	(126,938)	(113,316)	(130,540)	(140,904)	(67,090)	(140,904)	(144,325)
Membership	1,113,052	1,157,540	1,171,120	1,214,557	658,047	1,214,557	1,209,850
<b>Net Profit/(Loss)</b>	<b>187,987</b>	<b>72,198</b>	<b>39,813</b>	<b>65,715</b>	<b>171,095</b>	<b>7,871</b>	<b>42,728</b>

**IIMC Financials**  
**2026 Budget Worksheet - Draft**  
**Administration**

Description	2022	2023	2024	2025	2025	2025	2026
	Actual Year End	Actual Year End	Actual Year End	Budget	Actual YTD as of June 2025	Projected Year End	Budget
<b>INCOME</b>							
Interest & Dividends	6,402	46,777	82,040	60,000	49,597	80,000	80,000
Realized Gain or (Loss)		(2,786)	19,748		509		
Unrealized Gain or (Loss)		11,522	10,963		23,369		
Misc Admin Revenue	-	-	-		-		
<b>Total Income</b>	<b>6,402</b>	<b>55,513</b>	<b>112,752</b>	<b>60,000</b>	<b>73,475</b>	<b>80,000</b>	<b>80,000</b>
<b>OVERHEAD EXPENSES</b>							
Salary/Wages	271,391	307,746	337,171	344,107	168,282	344,107	366,997
Salary Benefits	43,686	42,596	44,058	48,233	24,178	48,233	50,669
Payroll Taxes-Employer	18,921	22,881	24,021	26,374	14,295	26,374	26,777
Workers Comp Insurance	1,358	1,391	1,515	2,016	755	2,016	1,775
<b>Personnel Costs</b>	<b>335,356</b>	<b>374,614</b>	<b>406,765</b>	<b>420,730</b>	<b>207,510</b>	<b>420,730</b>	<b>446,218</b>
Other	3,261	4,172	4,646	3,000	1,778	3,000	5,000
Auto Mileage-Staff		-	10	200	-	200	200
Admin Accommodations		-	1,679	2,870	-	2,870	2,500
Admin Airfare	2,920	1,815	2,203	3,000	-	3,000	3,000
Admin Ground	89	96	1,317	500	-	500	1,000
Admin Meals	1,252	1,329	1,725	1,500	-	1,500	2,000
<b>Staff Travel</b>	<b>4,262</b>	<b>3,240</b>	<b>6,934</b>	<b>8,070</b>	-	<b>8,070</b>	<b>8,700</b>
Professional Develop/Training	836	1,013	599	1,500	-	1,500	1,500
Contract Labor	48,417	48,238	48,000	48,000	-	-	-
Auditor Fees	11,550	12,200	12,675	18,000	625	18,000	15,000
Legal Fees	-	1,563	-	2,500	500	2,500	2,500
<b>Professional Services</b>	<b>59,967</b>	<b>62,001</b>	<b>60,675</b>	<b>68,500</b>	<b>1,125</b>	<b>20,500</b>	<b>17,500</b>
Computer/Software Purchase	4,223	3,876	6,430	5,000	2,909	5,000	7,000
Computer/Software Support	60,227	61,285	65,817	60,000	36,482	60,000	70,000
<b>Computer Costs</b>	<b>64,450</b>	<b>65,161</b>	<b>72,247</b>	<b>65,000</b>	<b>39,391</b>	<b>65,000</b>	<b>77,000</b>
Office Equipment Lease	3,704	2,684	2,405	3,636	1,358	3,636	3,026
Office Equipment Maint		65	65	500	-	500	500
Office Equipment Purchase		-	997	1,500	-	1,500	2,000
Copier	7,998	6,539	6,330	7,000	3,219	7,000	7,200
<b>Office Equipment</b>	<b>11,702</b>	<b>9,288</b>	<b>9,797</b>	<b>12,636</b>	<b>4,577</b>	<b>12,636</b>	<b>12,726</b>
Office Supplies	3,974	9,396	7,362	10,000	1,751	10,000	10,000
Staff Monthly Cell Phone Allowance - WFH		-	3,150	3,600	810	3,600	3,600
Telephone	10,567	10,100	10,516	10,500	4,954	10,500	11,000
Web Site	-	3,243	6,807	6,000	2,384	6,000	4,000
Postage/Courier/Mailing	1,188	347	647	1,200	133	1,200	1,000
Printing	2,559	1,996	610	1,500	-	1,500	1,500
Shipping	514	0	172	-	-	-	-
<b>Office Expense</b>	<b>18,802</b>	<b>25,082</b>	<b>29,264</b>	<b>32,800</b>	<b>10,032</b>	<b>32,800</b>	<b>31,100</b>
Credit Card Fees	1,284	1,717	543	1,000	349	1,000	1,000
Bank Analysis Fees	4,140	4,112	4,432	5,400	2,142	5,400	5,000
Schwab Investment Fees		1,306	4,855	5,000	2,672	5,000	5,500
Payroll Processing	20,746	10,781	15,950	16,000	8,905	16,000	12,000
<b>Credit Card /Bank Fees</b>	<b>26,169</b>	<b>17,916</b>	<b>25,780</b>	<b>27,400</b>	<b>14,068</b>	<b>27,400</b>	<b>23,500</b>
Insurance-Retiree (*)	-	-	-	-	-	-	-
Memberships	926	523		1,000	-	1,000	1,000
Taxes Business	25	25	25	500	25	500	100
Depreciation Furn/Amortization Exp	6,117	10,258	11,421	10,000	3,965	10,000	10,000
<b>Total Administrative Expenses</b>	<b>531,874</b>	<b>573,294</b>	<b>628,153</b>	<b>651,136</b>	<b>282,471</b>	<b>603,136</b>	<b>634,344</b>
<b>Net Profit/Loss</b>	<b>(525,472)</b>	<b>(517,781)</b>	<b>(515,401)</b>	<b>(591,136)</b>	<b>(208,996)</b>	<b>(523,136)</b>	<b>(554,344)</b>

**IIMC Financials**  
**2026 Budget Worksheet - Draft**  
**Building**

Description	2022	2023	2024	2025	2025	2025	2026
	Actual Year End	Actual Year End	Actual Year End	Budget	Actual YTD as of June 2025	Projected Year End	Budget
<b>INCOME</b>							
Rental Income	51,380	63,162	65,987	68,820	34,406	68,820	68,820
<b>Total Income</b>	<b>51,380</b>	<b>63,162</b>	<b>65,987</b>	<b>68,820</b>	<b>34,406</b>	<b>68,820</b>	<b>68,820</b>
<b>DIRECT EXPENSE</b>							
Amortize Loan Costs	736	736	736	734	368	734	736
Association Fees	2,265	2,200	2,600	2,400	1,200	2,400	2,400
Depreciation Building	26,256	24,626	24,882	26,000	12,766	26,000	26,000
Insurance Fire/Property	3,695	4,252	4,448	4,500	3,024	4,500	6,200
Mortgage Interest	19,157	18,634	18,142	18,000	8,813	18,000	18,000
Property Tax	18,932	18,333	18,718	19,000	8,740	19,000	19,000
Building Repair and Maintenance	27,769	34,148	78,553	41,500	22,509	41,500	48,000
Supplies							
Utilities	15,867	16,570	16,677	16,000	8,312	16,000	16,000
Utilities - Tenant	130						
Utilities	15,998	16,570	16,677	16,000	8,312	16,000	16,000
Property Manager	7,271	6,950	600				-
Allocation to Bldg Reserve	-	-	-				
Commissions/Appraisals	11,487	-	-				
<b>Total Direct Expense</b>	<b>122,080</b>	<b>137,937</b>	<b>165,356</b>	<b>128,134</b>	<b>65,730</b>	<b>128,134</b>	<b>136,336</b>
<b>Net Profit/Loss</b>	<b>(70,700)</b>	<b>(74,775)</b>	<b>(99,368)</b>	<b>(59,314)</b>	<b>(31,324)</b>	<b>(59,314)</b>	<b>(67,516)</b>

**IIMC Financials**  
**2026 Budget Worksheet - Draft**  
**Committees**

	2022	2023	2024	2025	2025	2025	2026
Description	Actual Year End	Actual Year End	Actual Year End	Budget	Actual YTD as of June 2025	Projected Year End	Budget
<b>EXECUTIVE COMMITTEE:</b>							
Shipping	150	206		100	-	100	100
Travel Accommodations	7,049	2,647	6,954	8,000	3,695	8,000	8,000
Travel Airfare	13,139	14,888	16,388	20,000	5,036	20,000	20,000
Travel Ground	2,160	2,898	2,574	2,000	347	2,000	2,000
Travel Meals	4,049	1,148	3,045	2,500	766	2,500	2,500
Travel Other	77	37	-	500	-	500	500
Other	-	-	-	300	-	300	300
Travel	26,474	21,618	28,962	33,300	9,843	33,300	33,300
<b>Total Expense</b>	<b>26,624</b>	<b>21,824</b>	<b>28,962</b>	<b>33,400</b>	<b>9,843</b>	<b>33,400</b>	<b>33,400</b>
<b>BOARD OF DIRECTORS:</b>							
<b>General</b>							
Region XI Consultant	10,544	11,710	9,847	11,500	5,250	11,500	11,500
Region XI Expenses		1,084	-		-	-	-
Region X Consultant/Travel		-	-	1,500	-	1,500	5,000
<b>Insurance Officers &amp; Directors</b>	<b>3,091</b>	<b>3,148</b>	<b>3,164</b>	<b>3,200</b>	<b>3,222</b>	<b>3,200</b>	<b>3,500</b>
Legal Fees -	869		14,751	1,500	9,962	1,500	1,500
<b>Strategic Planning/Board Development</b>	<b>10,181</b>	<b>10,736</b>	<b>11,139</b>	<b>8,000</b>	<b>7,379</b>	<b>8,000</b>	<b>5,000</b>
Memorials	100	400	-	500	200	500	500
Parliamentarian Expense	4,666	9,192	4,499	8,500	5,393	8,500	8,500
Postage				100		100	100
Shipping	-	62		200	126	200	200
Other Expenses	-		150	500	225	500	500
<b>Other Expenses</b>	<b>-</b>	<b>62</b>	<b>150</b>	<b>800</b>	<b>351</b>	<b>800</b>	<b>800</b>
<b>General</b>	<b>29,451</b>	<b>36,332</b>	<b>43,550</b>	<b>35,500</b>	<b>31,756</b>	<b>35,500</b>	<b>36,300</b>
<b>Mid-Year</b>							
<b>Travel</b>	<b>14,848</b>	<b>92,512</b>	<b>82,386</b>	<b>68,500</b>	<b>-</b>	<b>68,500</b>	<b>80,500</b>
<b>Meeting Expense</b>	<b>836</b>	<b>14,109</b>	<b>12,592</b>	<b>3,000</b>	<b>-</b>	<b>3,000</b>	<b>10,000</b>
<b>Conference</b>							
<b>Travel</b>	<b>15,685</b>	<b>106,621</b>	<b>94,978</b>	<b>71,500</b>	<b>-</b>	<b>71,500</b>	<b>90,500</b>
<b>Board Meeting Expense</b>							
<b>Conference</b>	<b>14,211</b>	<b>10,707</b>	<b>16,937</b>	<b>20,000</b>	<b>13,205</b>	<b>20,000</b>	<b>11,000</b>
	<b>8,476</b>	<b>32,589</b>	<b>13,335</b>	<b>11,000</b>	<b>12,766</b>	<b>11,000</b>	<b>15,000</b>
<b>Total Expense</b>	<b>22,687</b>	<b>43,297</b>	<b>30,272</b>	<b>31,000</b>	<b>25,971</b>	<b>31,000</b>	<b>26,000</b>
<b>BUDGET AND PLANNING:</b>							
Travel Accommodations	4,459	3,397	6,286	5,000	-	5,000	5,000
Travel Airfare	4,298	3,598	5,257	6,000		6,000	6,000
Travel Ground	760	606	431	500		500	500
Travel Meals	3,787	5,548	5,460	4,000		4,000	4,000
Travel Other	0	-	-	200		200	200
<b>BUDGET AND PLANNING</b>	<b>13,304</b>	<b>13,148</b>	<b>17,433</b>	<b>15,700</b>	<b>-</b>	<b>15,700</b>	<b>15,700</b>
<b>IIMC/NAGARA Workshops</b>							
<b>RECORDS MANAGEMENT</b>							
Task Force - Futures	-	-	-	13,500	26,124	26,124	-
<b>Total Other Committees Expense</b>	<b>13,479</b>	<b>13,148</b>	<b>17,433</b>	<b>30,700</b>	<b>26,124</b>	<b>43,324</b>	<b>17,200</b>
<b>Executive Committee</b>	<b>26,624</b>	<b>21,824</b>	<b>28,962</b>	<b>33,400</b>	<b>9,843</b>	<b>33,400</b>	<b>33,400</b>
<b>Board of Directors</b>	<b>67,823</b>	<b>186,250</b>	<b>168,800</b>	<b>138,000</b>	<b>57,726</b>	<b>138,000</b>	<b>152,800</b>
<b>Other Committees</b>	<b>13,479</b>	<b>13,148</b>	<b>17,433</b>	<b>30,700</b>	<b>26,124</b>	<b>43,324</b>	<b>17,200</b>
<b>Total Expense</b>	<b>107,925</b>	<b>221,222</b>	<b>215,195</b>	<b>202,100</b>	<b>93,693</b>	<b>214,724</b>	<b>203,400</b>
<b>Net Profit/Loss</b>	<b>(107,925)</b>	<b>(221,222)</b>	<b>(215,195)</b>	<b>(202,100)</b>	<b>(93,693)</b>	<b>(214,724)</b>	<b>(203,400)</b>

**IIMC Financials**  
**2026 Budget Worksheet - Draft**  
**Conference**

Description	2022	2023	2024	2025	2025	2025	2026
	Actual Year End	Actual Year End	Actual Year End	Budget	Actual YTD as of June 2025	Projected Year End	Budget
<b>INCOME</b>							
<b>Registration Members-Full</b>	<b>343,980</b>	<b>337,440</b>	<b>332,680</b>	<b>455,000</b>	<b>441,203</b>	<b>441,203</b>	<b>525,000</b>
- Comp - Full Registration	(22,325)	(675)		(34,420)			(35,000)
- Discount - First Timer	(5,850)	-	-	(6,750)			(10,000)
- Discount - Multi Attendee	(12,867)	-	-	(6,100)			
- Discount - Conference Region Discounts	(3,400)	(50)					
- Discount - Region X	(1,130)	-	-				
- Discount - Region XI	(1,405)	-	-				
- Discount - Speakers	(525)	-	-				
<b>Registration Discounts</b>	<b>(61,357)</b>	<b>(725)</b>	<b>-</b>	<b>(47,270)</b>	<b>-</b>	<b>-</b>	<b>(45,000)</b>
<b>NET</b>	<b>282,623</b>	<b>336,715</b>	<b>332,680</b>	<b>407,730</b>	<b>441,203</b>	<b>441,203</b>	<b>480,000</b>
Registration Guest	6,030	7,075	10,740	6,625	10,189	10,189	8,000
Donations & Sponsorships	80,252	70,231	66,350	72,450	54,225	54,225	72,450
Exhibitor Program	23,550	21,000	22,100	60,000	29,650	29,650	30,000
Cancellation Fee	5,173	3,799	-	5,000	200	200	-
Misc Conference Revenue	77,590	65,471	100,242	25,911	57,290	57,290	53,825
Academy Workshop	28,646	28,938	29,256	32,220	36,888	36,888	35,000
Athenian Leadership Society	8,445	6,955	5,410	13,200	6,285	6,285	13,500
Offsite Education Program	-	4,440	-	5,000	-	-	5,000
Boutique Sales	2,010	2,881	-	2,000	5,946	5,946	6,000
<b>Total Income</b>	<b>514,318</b>	<b>547,505</b>	<b>566,778</b>	<b>630,136</b>	<b>641,876</b>	<b>641,876</b>	<b>703,775</b>
<b>DIRECT EXPENSES</b>							
Planner - Contract Labor	70,238	105,871	78,234	90,000	36,998	90,000	93,000
Planner Travel Accomm.				2,900	817	2,900	2,000
Planner Airfare	636	2,790	4,214	3,000	963	3,000	3,000
Planner Ground Travel	311	454	280	500	277	400	500
Planner Travel Meals	675	428	334	500	189	300	500
PlannerTravel Other	173		20				
<b>Conference Planner</b>	<b>72,033</b>	<b>109,543</b>	<b>83,082</b>	<b>96,900</b>	<b>39,245</b>	<b>96,600</b>	<b>99,000</b>
Academy Speaker Fees	12,361	16,072	17,509	16,000	19,500	19,500	20,000
Academy Speaker Accommodations	1,158	1,836	2,335	2,500	798	798	2,500
Academy Speaker Meals	530	420	514	650	459	459	650
Academy Speaker Travel	4,263	1,717	4,564	4,200	4,020	4,020	5,000
Academy Materials/Supplies	-	-	-	100	-	-	100
Academy Transportation	-	976	-	100	606	606	1,000
<b>Academy Expenses</b>	<b>18,312</b>	<b>21,021</b>	<b>24,921</b>	<b>23,550</b>	<b>25,383</b>	<b>25,383</b>	<b>29,250</b>
Genl/Plenary Speaker Fees	38,623	22,500	20,500	30,000	30,750	30,750	30,000
Genl/Plenary Speaker Accommodations	564	638	602	1,000	553	553	1,000
Genl/Plenary Speaker Meals	-	-	42	300	31	31	300
Genl/Plenary Speaker Travel	2,000	1,060	2,148	3,000	744	744	3,000
<b>Gen/Plenary Speaker Expenses</b>	<b>41,187</b>	<b>24,197</b>	<b>23,292</b>	<b>34,300</b>	<b>32,078</b>	<b>32,078</b>	<b>34,300</b>
Speakers Fees	43,000	23,780	40,719	40,000	30,000	30,000	40,000
Speakers Accommodations	5,357	6,032	8,196	6,000	584	584	3,000
Speakers Meals	966	641	924	1,000	727	727	1,000
Speakers Travel	7,795	5,125	5,526	5,500	3,415	3,415	5,500
Offsite Education - Transportation/Fees	4,400	1,376	-	2,500	-	-	2,500
<b>Speaker Expenses</b>	<b>61,517</b>	<b>36,954</b>	<b>55,365</b>	<b>55,000</b>	<b>34,726</b>	<b>34,726</b>	<b>52,000</b>
Staff Travel Accomm.	10,305	8,985	3,789	14,791	11,524	11,524	14,000
Conf. Travel Airfare Staff	4,825	2,829	13,002	9,600	9,258	9,258	8,000
Conf. Travel Ground - Staff	917	2,193	1,655	1,500	1,733	1,733	2,000
Conf. Travel Meals - Staff	5,278	7,831	7,318	5,000	6,723	6,723	7,000
Conf. Travel Other - Staff	-	-	-	100	-	-	100
Conf. Travel Accomm. - Raffle Donation	564	1,060	-	1,000	2,335	2,335	2,500
<b>Staff Conference Travel</b>	<b>21,889</b>	<b>22,898</b>	<b>25,764</b>	<b>31,991</b>	<b>31,573</b>	<b>31,573</b>	<b>33,600</b>
Travel Accommodations VIP	12,279	8,864	14,232	13,000	2,335	2,335	10,000
Conf. Transportation - VIP	-	-	-	-	-	-	-
<b>VIP Travel</b>	<b>12,279</b>	<b>8,864</b>	<b>14,232</b>	<b>13,000</b>	<b>2,335</b>	<b>2,335</b>	<b>10,000</b>

**IIMC Financials**  
**2026 Budget Worksheet - Draft**  
**Conference**

<b>Description</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2025</b>	<b>2025</b>	<b>2026</b>
	<b>Actual Year End</b>	<b>Actual Year End</b>	<b>Actual Year End</b>	<b>Budget</b>	<b>Actual YTD as of June 2025</b>	<b>Projected Year End</b>	<b>Budget</b>
Opening Reception	7,647	15,403	19,501	10,000	23,558	23,558	15,000
All Conference Event	27,066	71,521	38,468	50,000	51,231	51,231	50,000
Opening Ceremony	500	2,250	427	500	793	793	500
<b>Conference Events Expenses</b>	<b>35,213</b>	<b>89,175</b>	<b>58,396</b>	<b>60,500</b>	<b>75,582</b>	<b>75,582</b>	<b>65,500</b>
Food & Beverage	67,508	146,668	107,524	100,000	187,164	187,164	150,000
Colloquium Food & Beverage	2,679	2,618	1,604	1,500	-	-	3,000
Annual Banquet	24,887	54,284	46,387	40,000	76,730	76,730	50,000
Private Receptions	7,019	18,422	13,813	10,000	24,452	24,452	10,000
Meeting Expense - MCEF	2,331	8,129	2,248	3,000	6,585	6,585	3,000
<b>Food &amp; Beverage Expenses</b>	<b>104,425</b>	<b>230,121</b>	<b>171,576</b>	<b>154,500</b>	<b>294,932</b>	<b>294,932</b>	<b>216,000</b>
Audio/Visual	61,906	92,921	99,911	90,000	110,092	110,092	100,000
Conference Printing/Design Work	5,064	4,877	4,998	7,500	4,386	4,386	5,000
Conference App	-	-	-	-	-	-	-
Meeting Space Labor	361	578	-	-	-	-	-
Credit Card Fees	11,786	11,226	19,269	15,000	12,669	12,669	15,000
Hotel Room - Attrition	7,462	-	-	-	-	-	-
Athenian Leadership Society	6,689	924	2,901	3,000	696	696	3,000
Telephone/Internet	740	-	55	1,000	-	-	-
Awards & Gifts	1,228	1,366	3,024	3,500	2,334	2,334	3,500
Meeting Room	329	-	21,471	-	-	-	-
Office Supplies	-	715	130	800	1,028	1,028	1,000
Shipping	2,472	7,509	6,298	6,000	4,377	4,377	5,000
Lanyards/Bags/Gifts	3,212	2,900	3,796	3,700	3,429	3,429	3,700
Conference Security	388	-	-	1,000	-	-	1,000
Colloquium Institute Director	500	-	500	500	-	-	1,000
Postage/Courier/Mailing	161	-	-	200	-	-	200
Conf. Transportation	3,085	-	-	-	-	-	-
Exhibit Hall	4,503	8,437	39,847	12,000	6,579	6,579	7,500
Photographer	3,450	3,525	4,529	4,500	4,034	4,034	4,500
Signage - Room Keys	1,158	-	-	-	-	-	-
Merchandise	2,903	5,736	-	1,000	2,849	2,849	3,000
Other	72	72	73	-	300	300	-
Conference - Kit App	9,318	5,769	6,984	12,500	10,919	10,919	12,500
<b>Other Conference Expenses</b>	<b>59,815</b>	<b>48,758</b>	<b>108,878</b>	<b>64,700</b>	<b>49,214</b>	<b>49,214</b>	<b>60,900</b>
Total Expense	493,639	689,328	670,414	631,941	699,544	756,901	705,550
<b>Net Profit/Loss</b>	<b>20,679</b>	<b>(141,823)</b>	<b>(103,636)</b>	<b>(1,805)</b>	<b>(57,668)</b>	<b>(115,025)</b>	<b>(1,775)</b>

**IIMC Financials**  
**2026 Budget Worksheet - Draft**  
**Education**

Description	2022	2023	2024	2025	2025	2025	2026
	Actual Year End	Actual Year End	Actual Year End	Budget	Actual YTD as of June 2025	Projected Year End	Budget
<b>INCOME:</b>							
Foundation Contribution/Policy 8	26,402	26,999	43,067	25,000		25,000	25,000
CMC Fees	57,525	56,270	52,200	58,000	34,825	58,000	60,000
MMC Fees	50,340	58,075	59,030	50,000	33,775	50,000	60,000
EPP Fees		15,400	-				
<b>Sales Pins &amp; Plaques</b>	<b>14,950</b>	<b>5,295</b>	<b>(2,375)</b>	<b>-</b>	<b>(400)</b>	<b>-</b>	<b>-</b>
Distance Ed Registration	54,335	101,028	151,674	150,000	66,794	150,000	150,000
New Institute Application Fees		300	300	300		300	
Region XI Symposium		140,766	-	140,000	100,038	140,000	
<b>Total Income</b>	<b>203,552</b>	<b>404,133</b>	<b>303,896</b>	<b>423,300</b>	<b>235,032</b>	<b>423,300</b>	<b>295,000</b>
<b>DIRECT EXPENSES:</b>							
Salary/Wages	218,793	198,770	232,306	294,650	143,196	294,650	310,800
Salary Benefits	33,691	29,396	36,181	43,612	21,426	43,612	45,681
Payroll Taxes - Employer	18,037	17,072	19,402	25,103	12,856	25,103	24,511
Workers Comp Insurance	1,091	985	941	1,918	610	1,918	1,270
<b>Personnel Costs</b>	<b>271,611</b>	<b>246,223</b>	<b>288,830</b>	<b>365,283</b>	<b>178,088</b>	<b>365,283</b>	<b>382,262</b>
Staff Travel Accommodations			276	1,000	273	1,000	2,000
Staff Airfare	107	756	685	1,500	772	1,500	3,000
Staff Travel Ground	112	861	218	100	318	100	500
Staff Travel Meals		590	482	500	360	500	1,500
<b>Staff Travel</b>	<b>219</b>	<b>2,207</b>	<b>1,661</b>	<b>3,100</b>	<b>1,724</b>	<b>3,100</b>	<b>7,000</b>
<b>Professional Develop/Training</b>		<b>1,475</b>	-	<b>2,000</b>	<b>300</b>	<b>2,000</b>	<b>2,000</b>
<b>Foundation - Region Stipends</b>	<b>3,000</b>	<b>8,000</b>	<b>7,000</b>	<b>12,000</b>	<b>5,000</b>	<b>12,000</b>	<b>12,000</b>
Region XI Symposium		<b>120,787</b>	-	<b>140,000</b>	<b>31,509</b>	<b>140,000</b>	
Distance Ed	<b>11,000</b>	<b>12,600</b>	<b>30,800</b>	<b>24,000</b>	<b>21,100</b>	<b>24,000</b>	<b>42,000</b>
<b>Pins &amp; Plaques</b>	<b>11,483</b>	<b>1,558</b>	<b>6,264</b>	<b>5,000</b>	<b>-</b>	<b>5,000</b>	<b>5,000</b>
Computer/Software Support	1,064	4,151	22,963	5,000	12,773	5,000	20,000
Office Supplies		119		500	496	500	500
Postage/Courier/Mailing	1,146	2,615	4,508	5,000	2,335	5,000	5,000
Printing		4,864		5,000	4,933	5,000	5,000
Shipping	13,195	8,198				-	-
Office Expenses	<b>14,341</b>	<b>15,796</b>	<b>4,508</b>	<b>10,500</b>	<b>7,763</b>	<b>10,500</b>	<b>10,500</b>
Credit Card Fee	5,543	7,761	9,037	10,000	4,957	10,000	10,000
Bank Fees	<b>5,543</b>	<b>7,761</b>	<b>9,037</b>	<b>10,000</b>	<b>4,957</b>	<b>10,000</b>	<b>10,000</b>
<b>Total Direct Expense</b>	<b>318,261</b>	<b>420,559</b>	<b>371,063</b>	<b>576,883</b>	<b>263,214</b>	<b>576,883</b>	<b>490,762</b>
<b>Net Profit/Loss</b>	<b>(114,708)</b>	<b>(16,426)</b>	<b>(67,167)</b>	<b>(153,583)</b>	<b>(28,181)</b>	<b>(153,583)</b>	<b>(195,762)</b>

**IIMC Financials**  
**2026 Budget Worksheet - Draft**  
**Marketing**

	2022	2023	2024	2025	2025	2025	2026
Description	Actual Year End	Actual Year End	Actual Year End	Budget	Actual YTD as of June 2025	Projected Year End	Budget
<b>INCOME</b>							
Advertising	525			1,000		1,000	1,000
Advertising/Sponsor	17,760	19,042	18,250	18,250	8,896	18,250	18,250
Advertising Job Posting Website	11,237	11,523	11,246	8,000	3,464	8,000	8,000
<b>Advertising</b>	<b>29,523</b>	<b>30,564</b>	<b>29,496</b>	<b>27,250</b>	<b>12,360</b>	<b>27,250</b>	<b>27,250</b>
Royalty - Liberty Mutual							
Royalty - Robert's Rule of Order	6						
Royalties Other - E.Mina/NAP	140	84		200	28	200	200
<b>Royalty</b>	<b>146</b>	<b>84</b>	<b>-</b>	<b>200</b>	<b>28</b>	<b>200</b>	<b>200</b>
Mailing Lists				500		500	500
Merchandise				500		500	500
Publications	216	393	322	500	174	500	500
Publications - Book 8	265			300	40	300	300
<b>Publications</b>	<b>481</b>	<b>393</b>	<b>322</b>	<b>800</b>	<b>214</b>	<b>800</b>	<b>800</b>
<b>Total Income</b>	<b>30,150</b>	<b>32,791</b>	<b>30,693</b>	<b>29,250</b>	<b>12,602</b>	<b>29,250</b>	<b>29,250</b>
<b>EXPENSES</b>							
Salary/Wages	119,651	108,419	124,444	126,453	59,036	126,453	129,057
Salary Benefits	17,263	16,537	17,888	21,333	10,610	21,333	22,632
Payroll Taxes	8,737	8,185	9,293	9,690	5,251	9,690	9,288
Workers Comp Insurance	736	696	659	828	331	828	748
<b>Personnel</b>	<b>146,387</b>	<b>133,837</b>	<b>152,284</b>	<b>158,304</b>	<b>75,227</b>	<b>158,304</b>	<b>161,725</b>
Staff Travel Accommodations	691	430		1,200		1,200	1,200
Staff Airfare	985	1,218	367	800		800	800
Staff Travel Ground	115	334	(1)				
Staff Travel Meals		94					
Staff Travel Other							
<b>Staff Travel</b>	<b>1,791</b>	<b>2,075</b>	<b>366</b>	<b>2,000</b>	<b>-</b>	<b>2,000</b>	<b>2,000</b>
<b>Professional Development</b>				300		300	300
Credit Card Fee	18	66	130	150	7	150	150
<b>Awards &amp; Gifts</b>	<b>1,521</b>	<b>2,893</b>	<b>-</b>				
Design Work - Region XI Newsletter	365		20	500	250	500	500
Shipping	-			100		100	100
<b>Postage &amp; Shipping</b>	<b>-</b>			<b>100</b>		<b>100</b>	<b>100</b>
Exhibit/Sponsorship		149			487	-	-
News Digest - Design Work/Constant Contact	6,730	7,087	7,316	8,500	3,680	8,500	8,500
Printing - Book 8	275		1,116	500	40	500	500
<b>Printing - Publications</b>	<b>275</b>	<b>-</b>	<b>1,116</b>	<b>500</b>	<b>40</b>	<b>500</b>	<b>500</b>
<b>Total Direct Expense</b>	<b>157,088</b>	<b>146,107</b>	<b>161,233</b>	<b>170,154</b>	<b>79,692</b>	<b>170,154</b>	<b>173,575</b>
<b>Net Profit/Loss</b>	<b>(126,938)</b>	<b>(113,316)</b>	<b>(130,540)</b>	<b>(140,904)</b>	<b>(67,090)</b>	<b>(140,904)</b>	<b>(144,325)</b>

**IIMC Financials**  
**2026 Budget Worksheet - Draft**  
**Membership**

	2022	2023	2024	2025	2025	2025	2026
Description	Actual Year End	Actual Year End	Actual Year End	Budget	Actual YTD as of June 2025	Projected Year End	Budget
<b>INCOME</b>							
Membership Dues	1,348,319	1,434,492	1,489,888	1,575,000	824,989	1,575,000	1,575,000
Membership Late Fee	5,200	4,875	6,730	5,000	5,105	5,000	7,200
<b>Total Income</b>	<b>1,353,519</b>	<b>1,439,367</b>	<b>1,496,618</b>	<b>1,580,000</b>	<b>830,094</b>	<b>1,580,000</b>	<b>1,582,200</b>
<b>DIRECT EXPENSES</b>							
Salary/Wages	147,012	165,452	204,880	193,105	90,394	193,105	205,119
Salary Benefits	29,564	29,953	34,308	51,111	20,329	51,111	44,677
Payroll Taxes-Employer	13,781	14,650	17,609	17,335	9,403	17,335	17,590
Workers Comp Insurance	387	410	435	1,197	95	1,197	214
<b>Personnel</b>	<b>190,744</b>	<b>210,464</b>	<b>257,231</b>	<b>262,748</b>	<b>120,221</b>	<b>262,748</b>	<b>267,600</b>
Auto Mileage	-	7		100	23	100	100
Staff Travel Accommodations	706	1,484	1,897	2,500	726	2,500	2,500
Staff Airfare	1,124	513	1,522	2,000	666	2,000	3,000
Staff Travel Ground			415	550	6	550	550
Staff Travel Meals	95		82	75	-	75	500
Staff Travel Other	-			50		50	50
<b>Staff Travel</b>	<b>1,925</b>	<b>2,005</b>	<b>3,916</b>	<b>5,275</b>	<b>1,421</b>	<b>5,275</b>	<b>6,700</b>
Professional Develop/Training	1,050	1,260		1,170		1,170	2,700
Membership Drive	3,467	7,176	9,413	15,100	7,463	15,100	16,000
Promotion				-	301	-	1,000
Research Salary Survey Services	1,428	1,428	1,428	1,500	1,668	1,500	1,750
Dues Mailing	15,632	23,189	10,547	19,500	14,718	19,500	10,000
Computer/Software Support	1,279	8,379	18,379	25,000	7,703	25,000	26,600
Office Equipment				500	-	500	500
Postage/Courier/Mailing	1,847	1,316	193	250	3	250	100
Printing			15	4,000	-	4,000	4,000
<b>Office Expense</b>	<b>1,847</b>	<b>1,316</b>	<b>208</b>	<b>4,750</b>	<b>3</b>	<b>4,750</b>	<b>4,600</b>
Credit Card Fees	22,736	26,170	24,018	30,000	18,370	30,000	35,000
Membership	359	441	359	400	180	400	400
<b>Total Direct Expense</b>	<b>240,468</b>	<b>281,827</b>	<b>325,498</b>	<b>365,443</b>	<b>172,047</b>	<b>365,443</b>	<b>372,350</b>
<b>Net Profit/Loss</b>	<b>1,113,052</b>	<b>1,157,540</b>	<b>1,171,120</b>	<b>1,214,557</b>	<b>658,047</b>	<b>1,214,557</b>	<b>1,209,850</b>

## CAPITAL EXPENDITURES

### Five Year Plan

Below is a brief outline of a five year capital expenditures plan. The expenditures are listed for 2025 through 2031.

#### **2026 Capital Expenditures**

3 Dell Computers/Laptops @ \$1300 ea.	3,900
1 Dell Conf Laptops @ \$1300 ea. (4 Yrs)	1,300
A/C unit (oldest unit is from 2015)	11,000
HVAC Duct Work	30,000
410A Heat Pump System (Air)	10,000
iMIS 20-300 EMS - License 50% increase cloud based host website	33,000
iMIS 20-300 EMS - Online System - Phase Two/Three	30,000
iMIS 20-300 EMS - Online System - Phase Four	15,000
<b>TOTAL</b>	<b><u>\$ 134,200</u></b>

#### **2027 Capital Expenditures**

3 Dell Computers/Laptops @ \$1300 ea.	3,900
1 Dell Conf Laptops @ \$1300 ea. (4 Yrs)	1,300
A/C unit (oldest unit is from 2015)	11,000
HVAC Duct Work	30,000
410A Heat Pump System (Air)	10,000
iMIS 20-300 EMS - License 50% increase cloud based host website	33,000
<b>TOTAL</b>	<b><u>\$ 89,200</u></b>

#### **2028 Capital Expenditures**

3 Dell Computers/Laptops @ \$1300 ea.	3,900
Dell Power Edge Server for MAS 100 and storage	6,500
1 Dell Conf Laptops @ \$1300 ea. (4 Yrs)	1,300
Ipad/laptop for ED (3 Yrs)	2,500
Cell Phone for ED (3 Yrs)	1,000
A/C unit (oldest unit is from 2015)	11,000
iMIS 20-300 EMS - License 50% increase cloud based host website	33,000
iMIS 20-300 EMS - Online System	15,000
<b>TOTAL</b>	<b><u>\$ 74,200</u></b>

#### **2029 Capital Expenditures**

3 Dell Computers/Laptops @ \$1300 ea.	3,900
1 Dell Conf Laptops @ \$1300 ea. (4 Yrs)	1,300
A/C unit (oldest unit is from 2015)	11,000
iMIS 20-300 EMS - License 50% increase cloud based host website	33,000
<b>TOTAL</b>	<b><u>\$ 49,200</u></b>

#### **2030 Capital Expenditures**

3 Dell Computers/Laptops @ \$1300 ea.	3,900
A/C unit (oldest unit is from 2015)	11,000
1 Dell Conf Laptops @ \$1300 ea. (4 Yrs)	1,300
Parking Lot Resealed	6,500
iMIS 20-300 EMS - License 50% increase cloud based host website	33,000
<b>TOTAL</b>	<b><u>\$ 55,700</u></b>

#### **2031 Capital Expenditures**

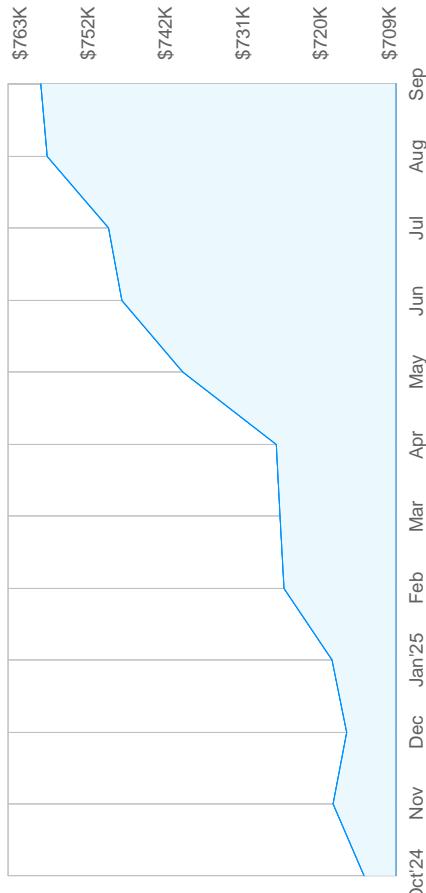
3 Dell Computers/Laptops @ \$1300 ea.	3,900
Executive Director Laptop	2,500
Executive Director Tablet	1,000
1 Dell Conf Laptops @ \$1100 ea. (4 Yrs)	1,100
A/C unit (oldest unit is from 2015)	11,000
Cat 6 Cable Line - 8x8 Phones (15)	3,000
Parking Lot Resealed	7,500
HVAC Duct Work	30,000
410A Heat Pump System (Air)	10,000
iMIS 20-300 EMS - License 50% increase cloud based host website	33,000
iMIS 20-300 EMS - Online System - Phase Two/Three	30,000
<b>TOTAL</b>	<b><u>\$ 133,000</u></b>

**\* Note: Certain capital expense items are included on an annual basis as recurring allocations. These allocations may not result in an expenditure within the respective fiscal year but are retained for continuity and future readiness.**

Account Number  
9755-7195  
Statement Period  
September 1-30, 2025

## Account Summary

Beginning Account Value as of 09/01	<b>\$758,144.94</b>
Ending Account Value as of 09/30	<b>\$758,993.29</b>



	Oct '24	Nov	Dec	Jan '25	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	YTD
Beginning Account Value													<b>\$758,144.94</b>
Deposits													<b>0.00</b>
Withdrawals													<b>0.00</b>
Dividends and Interest													<b>4,775.49</b>
Transfer of Securities													<b>0.00</b>
Market Appreciation/(Depreciation)													<b>(3,771.36)</b>
Expenses													<b>(155.78)</b>
<b>Ending Account Value</b>													<b>\$758,993.29</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.

**\$758,993.29**

THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CLERKS  
8331 UTICA AVE STE 200  
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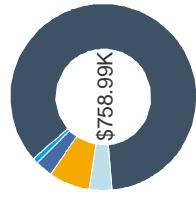
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## Schwab One® Account of

THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CLERKS

Statement Period  
September 1-30, 2025

### Asset Allocation



SYMBOL CUSIP	Description	Market Value	% of Accounts
842400HZ9	EDISON INTERNTNL	79,849.92	11%
785931AA4	SAFEHOLD GL HOLDI	52,479.35	7%
04686JAG6	ATHENE HOLDING	52,252.30	7%
AGEYX	AMERICAN BEACON DEVELOPIN...	52,227.43	7%
980236AV5	WOODSIDE FIN LIMIT6%	52,035.65	7%

### Income Summary

	Current Allocation		Current Allocation		YTD
	This Period	Federal Tax Status	This Period	Taxable	Tax-Exempt
Bank Sweep Interest	0.00	1.02	0.00	0.00	7.85
Cash Dividends	0.00	1,051.05	0.00	0.00	3,867.14
Corporate Bond and Other Interest	0.00	3,723.42	0.00	0.00	20,525.36
Certificate of Deposit Interest	0.00	0.00	0.00	0.00	10,450.00
<b>Total Income</b>	<b>\$0.00</b>	<b>\$4,775.49</b>	<b>\$0.00</b>	<b>\$34,850.35</b>	
Accrued Interest	0.00	(1,328.89)	0.00	0.00	(1,821.95)
<b>Paid<sup>4</sup></b>					

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

### Top Account Holdings This Period

SYMBOL CUSIP	Description	Market Value	% of Accounts
842400HZ9	EDISON INTERNTNL	79,849.92	11%
785931AA4	SAFEHOLD GL HOLDI	52,479.35	7%
04686JAG6	ATHENE HOLDING	52,252.30	7%
AGEYX	AMERICAN BEACON DEVELOPIN...	52,227.43	7%
980236AV5	WOODSIDE FIN LIMIT6%	52,035.65	7%

### Gain or (Loss) Summary

	Short-Term (ST)		Long-Term (LT)		
	Gain	(Loss)	Net	Gain	(Loss)
This Period	75.00	0.00	75.00	0.00	0.00
YTD			75.00		1,979.20
<b>Unrealized</b>				<b>\$9,369.62<sup>b</sup></b>	



Schwab One® Account of

THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CIRKKS

Statement Period  
**September 1-30, 2025**

## Gain or (Loss) Summary (continued)

Short-Term (ST)		Long-Term (LT)			Net
Gain	(Loss)	Net	Gain	(Loss)	
					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 log in to your account at <a href="http://Schwab.com">Schwab.com</a> 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

## Statement of Financial Condition

The most recent statement of financial condition for Charles Schwab & Co., Inc. (CS&Co) may be obtained at no cost, via the Internet at <http://www.schwab.com/legal/financials> or by contacting CS&Co at 1-800-435-4000. If you are a client of an independent investment advisor, contact Schwab Alliance at 1-800-515-2157. International clients, please call us at 1-415-667-7870 and Charles Schwab Hong Kong clients, please call +852-2101-0500. At June 30, and July 31, 2025, CS&Co had net capital of \$12.0 billion and \$10.9 billion, respectively, and a net capital requirement of \$2.2 billion and \$2.3 billion, respectively. A copy of the report may be requested via: Investor Relations, 3000 Schwab Way, Westlake, TX 76262. Independent investment advisors are not owned by, affiliated with, or supervised by CS&Co.

## Positions - Summary

Beginning Value as of 09/01	Transfer of Securities (In/Out)	Dividends Reinvested	Cash Activity	Change in Market Value	Ending Value as of 09/30	Cost Basis	Unrealized Gain/(Loss)
<b>\$758,144.94</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$4,619.71</b>	<b>(\$3,771.36)</b>	<b>\$758,993.29</b>	<b>\$740,713.82</b>	<b>\$9,369.62 b</b>

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

Total Cash and Cash Investments							1%		
Type	Symbol	Description	Quantity	Price(\$)	Beginning Balance(\$)	Ending Balance(\$)	Pending/Unsettled Cash(\$)	Interest/Yield Rate	% of Acct
Bank Sweep	CHARLES SCHWAB BANK <sup>X/Z</sup>		35,369.43		8,909.85	(26,459.58)		0.05%	1%
			<b>\$35,369.43</b>		<b>\$8,909.85</b>				<b>(\$26,459.58)</b>

Schwab One® Account of

THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CLERKS

Statement Period  
September 1-30, 2025

**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	100.09520	40,038.08 40,343.20	40,121.20 40,343.20	(83.12) <sup>b</sup> 4.13%	1,900.00	84.44	5%
665859AW4	NORTHERN TRUST CORP Moody's: A2 S&P: A+	4.0% 05/10/27	40,000.0000	100.12740	40,050.96 40,075.60	40,059.79 40,075.60	(8.83) <sup>b</sup> 3.92%	1,600.00	626.67	5%
06376AHL7	BANK OF MONTREAL Moody's: A2 S&P: NR Callable 02/23/26 AT 100.000000	5.0% 08/23/27	40,000.0000	100.20440	40,081.76 40,112.00	40,080.76 40,112.00	1.00 <sup>b</sup> 4.89%	2,000.00	211.11	5%
15654VBR8	CENTURY HOUSING Moody's: NR S&P: AA Callable 06/15/26 AT 100.000000	5.05% 06/15/28	20,000.0000	100.66100	20,132.20 20,000.00	20,000.00 20,000.00	132.20 5.05%	1,010.00	44.89	3%
13607XP76	CANADIAN IMPERIAL 6% Moody's: A2 S&P: A- Callable 12/08/25 AT 100.000000	6.0% 12/08/28	50,000.0000	100.23280	50,116.40 50,409.50	50,310.99 50,409.50	(194.59) <sup>b</sup> 5.80%	3,000.00	941.67	7%
06746AN58	BARCLAYS BANK P5.05% Moody's: A1 S&P: A+ Callable 03/05/27 AT 100.000000	5.05% 03/05/29	50,000.0000	100.25340	50,126.70 50,000.00	50,000.00 50,000.00	126.70 5.05%	2,525.00	182.36	7%
125523CT5	THE CIGNA GROUP Moody's: Baa1 S&P: A- Callable 04/15/29 AT 100.000000	5.0% 05/15/29	50,000.0000	102.43370	51,216.85 49,885.00	49,885.00 49,885.00	1,331.85 5.06%	2,500.00	944.44	7%
10922NAG8	BRIGHTHOUSE FIN Moody's: Baa3 S&P: BBB Callable 02/15/30 AT 100.000000	5.625% 05/15/30	50,000.0000	102.35000	51,175.00 50,098.00	50,083.62 50,098.00	1,091.38 <sup>b</sup> 5.59%	2,812.50	1,062.50	7%
06376DNF7	BANK OF MONTREAL 5.05% Moody's: A2 S&P: A- Callable 06/10/27 AT 100.000000	5.05% 06/10/30	50,000.0000	99.81920	49,909.60 50,000.00	50,000.00 50,000.00	(90.40) 5.05%	2,525.00	778.54	7%
04686JAG6	ATHENE HOLDING Moody's: Baa1 S&P: A- Callable 10/15/33 AT 100.000000	5.875% 01/15/34	50,000.0000	104.50460	52,252.30 49,775.50	49,775.50 49,775.50	2,476.80 5.93%	2,937.50	620.14	7%
785931AA4	SAFEHOLD GL HOLDI Moody's: A3 S&P: NR Callable 01/01/34 AT 100.000000	6.1% 04/01/34	50,000.0000	104.95870	52,479.35 49,958.00	49,958.00 49,958.00	2,521.35 6.11%	3,050.00	1,525.00	7%
842400HZ9	EDISON INTERNTNL Moody's: A2 S&P: BBB+ Callable 03/01/34 AT 100.000000	5.2% 06/01/34	80,000.0000	99.81240	79,849.92 79,750.40	79,750.40 79,750.40	99.52 5.24%	4,160.00	1,386.67	11%
980236AV5	WOODSIDE FIN LIMIT 6% Moody's: Baa1 S&P: BBB+ Callable 02/19/35 AT 100.000000	6.0% 05/19/35	50,000.0000	104.07130	52,035.65 49,764.50	49,764.50 49,764.50	2,271.15 6.06%	3,000.00	1,100.00	7%

## Schwab One® Account of

THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CLERKS

Statement Period  
September 1-30, 2025

### 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
38150AY33	THE GOLDMAN SACHS G	6.0% 02/15/36	12,000.0000	100.21870	12,026.24	12,094.21 12,102.24	(67.97) <sup>b</sup> 6.15%	720.00	92.00	2%
	Moody's: A2 S&P: BBB+ CALLABLE 11/15/25 AT 100.000000									
	<b>Total Fixed Income</b>		<b>632,000.0000</b>	<b>\$641,491.01</b>			<b>\$9,607.04</b>	<b>\$33,740.00</b>	<b>\$9,600.43</b>	<b>85%</b>

### Total Adj Cost Basis **\$631,883.97**

### Total Orig Cost Basis **\$632,273.94**

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.

Total Adj Cost Basis and Total Orig Cost Basis are the sums of the individual positions held, which may be incomplete or unavailable.

### Positions - Equities

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Yield	Est. Annual Income(\$)	% of Acct
FFA	FIRST TRUST ENHANCED EQU	1,500.0000	21.52000	32,280.00	29,504.85	2,775.15	7.2%	2,325.00	4%
				<b>\$32,280.00</b>	<b>\$29,504.85</b>		<b>\$2,775.15</b>	<b>\$2,325.00</b>	<b>4%</b>
	<b>Total Equities</b>								

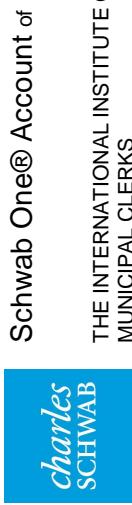
### Positions - Mutual Funds

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Annual Income(\$)	% of Acct
AGEYX	AMERICAN BEACON DEVELOP NGW/LDINCDF-YCL	7,067.3110	7.39000	52,227.43	50,000.00	2,227.43	2,227.43	7%
				<b>\$52,227.43</b>	<b>\$50,000.00</b>		<b>\$2,227.43</b>	<b>7%</b>
	<b>Total Mutual Funds</b>							

### Positions - Exchange Traded Funds

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Yield	Est. Annual Income(\$)	% of Acct
PFIX	SIMPLIFY INTEREST RATE	500.0000	48.17000	24,085.00	29,325.00	(5,240.00)	2.49%	600.00	3%
				<b>\$24,085.00</b>	<b>\$29,325.00</b>		<b>(\$5,240.00)</b>	<b>\$600.00</b>	<b>3%</b>
	<b>Total Exchange Traded Funds</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 CLERKSStatement Period  
September 1-30, 2025

## Transactions - Summary

		Deposits	+	Withdrawals	+	Purchases	+	Sales/Redemptions	+	Dividends/Interest	+	Expenses	=	Ending Cash* as of 09/30
<b>\$35,369.43</b>		<b>\$0.00</b>		<b>\$0.00</b>		<b>(\$81,079.29)</b>		<b>\$50,000.00</b>		<b>\$4,775.49</b>		<b>(\$155.78)</b>		<b>\$8,909.85</b>
<b>Other Activity</b> <b>\$0.00</b>		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)(\$)	
09/02	Dividend	Cash Dividend	AGEYXX	AMERICAN BEACON DEVELOPI				419.80		
09/04	Expense	Advisor Fee *		TO ADVISOR					(155.78)	
09/05	Interest	Bond Interest	06746AN58	BARCLAYS BANK P5.05% 29F					1,262.50	
09/15	Interest	Bond Interest	15654VBR8	CENTURY HOUSING 5.05%28					260.92	
	Interest	Bond Interest	524901AV7	LEGG MASON, INC. 4.75%26					950.00	
09/16	Interest	Bank Interest X-Z		BANK INT 081625-091525					1.02	
09/19	Redemption		06055JGD5	BANK OF AMERICA COR 5%30 **CALLED**					50,000.00	
	Other Activity	Call Redemption	06055JGD5	BANK OF AMERICA COR 5%30 **CALLED**						
	Interest	Bond Interest	06055JGD5	BANK OF AMERICA COR 5%30						
09/26	Purchase		842400HZ9	EDISON INTERNATL 5.2%34 DUE 06/01/34						
09/30	Dividend	Cash Dividend	FFA	FIRST TRUST ENHANCED EQU					581.25	
	Dividend	Cash Dividend	PFIX	SIMPLIFY INTEREST RATE					50.00	
	<b>Total Transactions</b>								<b>(\$26,459.58)</b>	<b>\$30.00</b>

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

## Bank Sweep Activity

Date	Description	Amount	Date	Description	Amount
09/01	<b>Beginning Balance</b> <sup>x,z</sup>	<b>\$35,369.43</b>	09/22	BANK CREDIT FROM BROKERAGE	<b>x</b>
09/03	BANK CREDIT FROM BROKERAGE	419.80	09/26	BANK TRANSFER TO BROKERAGE	(81,079.29)
09/05	BANK TRANSFER TO BROKERAGE	(155.78)	09/30	BANK CREDIT FROM BROKERAGE	x
09/08	BANK CREDIT FROM BROKERAGE	x	1,262.50	09/30 Ending Balance	<sup>x,z</sup> <b>\$8,909.85</b>
09/15	BANK INTEREST - CHARLES SCHWAB BANK	1.02	09/30	Interest Rate	<sup>x,z</sup> <b>0.05%</b>
09/16	BANK CREDIT FROM BROKERAGE	x			1,210.92

\* Your interest period was 08/16/25 - 09/15/25. <sup>z</sup>

## Endnotes For Your Account

<sup>a</sup> 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.

<sup>b</sup> When available, Adjusted Cost Basis values are used in Gain or (Loss) calculations.

<sup>x</sup> Bank Sweep deposits are held at one or more FDIC-insured Program Banks. Charles Schwab & Co., Inc. is not an FDIC-insured bank and deposit insurance covers the failure of an insured bank. Certain conditions must be satisfied for FDIC insurance coverage to apply. Please review the Cash Features Program Disclosure Statement for a list of the Program Banks at schwab.com/cashfeaturesdisclosure.

## Terms and Conditions

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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**

## Terms and Conditions (continued)

**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.**

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Statement Period  
**September 1-30, 2025**

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## Schwab One® Account of

THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CLERKS  
INVESTNET APM SRI

Charles  
SCHWAB

Account Number Statement Period  
5054-7566 September 1-30, 2025

## Account Summary

Beginning Account Value as of 09/01  
**\$150,859.08**

Ending Account Value as of 09/30  
**\$154,817.96**



	Oct'24	Nov	Dec	Jan'25	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	This Statement	YTD
Beginning Account Value													<b>\$150,859.08</b>	\$143,266.21
Deposits													<b>0.00</b>	0.00
Withdrawals													<b>0.00</b>	0.00
Dividends and Interest													<b>378.32</b>	3,589.11
Transfer of Securities													<b>0.00</b>	0.00
Market Appreciation/(Depreciation)													<b>3,673.56</b>	9,079.14
Expenses													<b>(93.00)</b>	(1,116.50)
<b>Ending Account Value</b>													<b>\$154,817.96</b>	<b>\$154,817.96</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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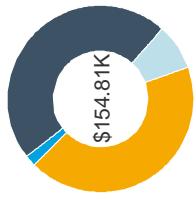
## Schwab One® Account of

THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CLERKS  
ENVESTNET APM SRI



Statement Period  
September 1-30, 2025

### Asset Allocation



### Income Summary

		This Period		YTD	
		Current Allocation	Allocation	Tax-Exempt	Taxable
	Federal Tax Status				
	Schwab One® Interest	0.00	0.00	0.00	0.41
	Cash Dividends	0.00	378.32	0.00	3,588.70
<b>Total Income</b>		<b>\$0.00</b>	<b>\$378.32</b>	<b>\$0.00</b>	<b>\$3,589.11</b>

### Top Account Holdings This Period

SYMBOL CUSIP	Description	Market Value	% of Accounts
GOLY	STRATEGY SHARES GOLD	13,075.92	8%
NVDA	NVIDIA CORP	12,127.70	8%
AGEYX	AMERICAN BEACON DEVELOPIN...	11,975.69	8%
IDMO	INVSC S P INTERNATIONAL	10,582.04	7%
SMH	VANECK SEMICONDUCTOR	10,117.16	7%

### 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			(3,102.68)			5,358.03
<b>Unrealized</b>						<b>\$23,445.83</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.

## A Message About Your Account

### Statement of Financial Condition

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## Positions - Summary

Beginning Value as of 09/01	Transfer of Securities(In/Out)	Dividends Reinvested	Cash Activity	Change in Market Value	Ending Value as of 09/30	Cost Basis	Unrealized Gain/(Loss)
<b>\$150,859.08</b>	<b>\$0.00</b>	<b>(\$95.48)</b>	<b>\$285.32</b>	<b>\$3,769.04</b>	<b>\$154,817.96</b>	<b>\$127,917.90</b>	<b>\$23,445.83</b>

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.

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## 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					3,264.39	3,454.23	189.84	94.41	2%	
					<b>\$3,264.39</b>	<b>\$3,454.23</b>		<b>\$189.84</b>		

## Positions - Equities

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Yield	Est. Annual Income(\$)	% of Acct
GOOGL	ALPHABET INC	37.0000	243.10000	8,994.70	5,449.83	3,544.87	0.34%	31.08	6%
AMZN	AMAZON.COM INC	27.0000	219.57000	5,928.39	4,927.82	1,000.57	N/A	0.00	4%
AAPL	APPLE INC	34.0000	254.63000	8,657.42	6,583.76	2,073.66	0.4%	35.36	6%
BBY	BEST BUY INC	86.0000	75.62000	6,503.32	5,229.37	1,273.95	5.02%	326.80	4%
COST	COSTCO WHSL CORP NEW	8.0000	925.63000	7,405.04	7,736.13	(331.09)	0.56%	41.60	5%
CVS	CVS HEALTH CORP	115.0000	75.39000	8,669.85	7,477.54	1,192.31	3.52%	305.90	6%



Schwab One® Account of  
THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CLERKS  
ENVESTNET APM SRI

Statement Period  
September 1-30, 2025

### Positions - Equities (continued)

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Yield	Est. Annual Income(\$)	% of Acct
MSFT	MICROSOFT CORP	14.0000	517.95000	7,251.30	5,332.73	1,918.57	0.64%	46.48	5%
NVDA	NVIDIA CORP	65.0000	186.58000	12,127.70	5,736.32	6,391.38	0.02%	2.60	8%
CRM	SALESFORCE INC	29.0000	237.00000	6,873.00	7,303.70	(430.70)	0.7%	48.26	4%
<b>Total Equities</b>			<b>\$72,410.72</b>	<b>\$55,777.20</b>	<b>\$16,633.52</b>		<b>\$838.08</b>	<b>47%</b>	

### Positions - Mutual Funds

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	% of Acct
AGEYX	AMERICAN BEACON DEVELOP <sup>◊</sup> NGWLDINCFD-YCL	1,620.5260	7.39000	11,975.69	11,248.27	727.42	727.42	727.42	8%
<b>Total Mutual Funds</b>				<b>\$11,975.69</b>	<b>\$11,248.27</b>		<b>\$727.42</b>	<b>8%</b>	
<sup>134</sup>									

### Positions - Exchange Traded Funds

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Yield	Est. Annual Income(\$)	% of Acct
TDTF	FLEXSHARES IBOXX 5 YR	362.0000	24.27000	8,785.74	8,567.30	218.44	5.56%	489.00	6%
IDMO	INVEST S P INTERNATIONAL	196.0000	53.99000	10,582.04	9,893.90	688.14	1.28%	136.01	7%
IFRA	ISHARES US	145.0000	52.82000	7,658.90	6,206.09	1,452.81	1.63%	125.27	5%
PFIX	SIMPLIFY INTEREST RATE	164.0000	48.17000	7,899.88	9,132.56	(1,232.68)	2.49%	196.80	5%
GOLY	STRATEGY SHARES GOLD	396.0000	33.02000	13,075.92	10,212.84	2,863.08	6.57%	859.44	8%
SMH	VANECK SEMICONDUCTOR	31.0000	326.36000	10,117.16	8,833.98	1,283.18	0.32%	33.21	7%
PFFA	VIRTUS INFRCP US PRERD	408.0000	21.71000	8,857.68	8,045.76	811.92	9.39%	832.32	6%
<b>Total Exchange Traded Funds</b>				<b>\$66,977.32</b>	<b>\$60,892.43</b>		<b>\$6,084.89</b>	<b>\$2,672.05</b>	<b>43%</b>

Estimated Annual Income ("EA1") 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 EA1 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 EA1 and EY would be overstated. EY and EA1 are not promptly updated to reflect when an issuer has missed a regular payment or announced changes to future payments, in which case EA1 and EY will continue to display at a prior rate.



**Schwab One® Account of  
THE INTERNATIONAL INSTITUTE  
MUNICIPAL CLERKS  
ENVESTNET APM SRI**

Statement Period  
**September 1-30, 2025**

Transactions - Summary

Beginning Cash* as of 09/01	<b>\$3,264.39</b>				
Deposits	<b>\$0.00</b>				
Withdrawals	<b>\$0.00</b>				
Purchases	<b>(\$95.48)</b>				
Sales/Redemptions	<b>\$0.00</b>				
Dividends/Interest	<b>\$378.32</b>				
Expenses	<b>(\$93.00)</b>				
Ending Cash* as of 09/30	<b>\$3,454.23</b>				

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 column represents the Settlement/Process date for each transaction.

## 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	09/11	Qual Div	NVDA	NVIDIA CORP	65.0000	0.0100		10/02		0.65
	09/17	Qual Div	CRM	SALESFORCE INC	29.0000	0.4160		10/09		12.06
	09/18	Qual Div	BBY	BEST BUY INC	86.0000	0.9500		10/09		81.70
<b>Total Pending Transactions</b>										<b>\$94.41</b>

Pending transactions are not included in account value.

## 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.

## 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. **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 and 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)

## Terms and Conditions (continued)

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. 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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. 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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 **Securities Investor Protection Act (SIPA)**. 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## Schwab One® Account of

THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CLERKS  
MGR: INVESTNET ASSET MGMT

**Charles**  
SCHWAB

Account Number Statement Period  
3508-4803 September 1-30, 2025

## Account Summary

Beginning Account Value as of 09/01  
**\$243,957.29**

Ending Account Value as of 09/30  
**\$252,051.50**



	Oct '24	Nov	Dec	Jan '25	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	This Statement	YTD
Beginning Account Value													<b>\$243,957.29</b>	\$217,711.59
Deposits													<b>0.00</b>	0.00
Withdrawals													<b>0.00</b>	0.00
Dividends and Interest													<b>982.36</b>	3,675.38
Transfer of Securities													<b>0.00</b>	0.00
Market Appreciation/(Depreciation)													<b>7,262.23</b>	32,173.19
Expenses													<b>(150.38)</b>	(1,508.66)
<b>Ending Account Value</b>													<b>\$252,051.50</b>	<b>\$252,051.50</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.

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

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

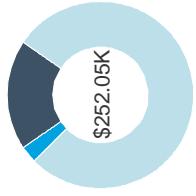
## Schwab One® Account of

THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CLERKS  
MGR: ENVESTNET ASSET MGMT



Statement Period  
September 1-30, 2025

### Asset Allocation



### Income Summary

	This Period		Current Allocation		This Period		YTD	
	Federal Tax Status	Tax-Exempt	Bank Sweep Interest	Taxable	Tax-Exempt	Taxable	Tax-Exempt	Taxable
Cash and Cash Investments	7,180.68	3%	0.00	0.31	0.00	0.00	0.00	2.66
Mutual Funds	47,480.69	19%	0.00	982.05	0.00	0.00	0.00	3,672.72
Exchange Traded Funds	197,390.13	78%						
<b>Total Income</b>	<b>\$0.00</b>	<b>\$982.36</b>			<b>\$0.00</b>	<b>\$3,675.38</b>		

### Top Account Holdings This Period

SYMBOL CUSIP	Description	Market Value	% of Accounts
NTBIX	NAVIGATOR TACTICAL FIXED ...	47,480.69	19%
IVV	ISHARES CORE S&P 500	43,504.50	17%
IXUS	ISHARES CORE MSCI TOTL	33,940.38	13%
ITA	ISHARES US AEROSPACE	22,809.34	9%
SPMO	INVSC S P 500 MOMENTUM	21,790.80	9%

### Gain or (Loss) Summary

	Short-Term (ST)		Long-Term (LT)	
	Gain	(Loss)	Net	Gain
This Period	6,310.08	(455.41)	5,854.67	0.00
YTD			6,466.28	(105.66)
<b>Unrealized</b>				<b>\$25,852.10</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  
COMMUNICATIONAL CLERKS**  
WGR: ENVESTNET ASSET MGMT

Statement Period  
**September 1-30, 2025**

## A Message About Your Account

## Statement of Financial Condition

The most recent statement of financial condition for Charles Schwab & Co., Inc. (CS&Co) may be obtained at no cost, via the Internet at <http://www.schwab.com/legal/financials> or by contacting CS&Co at 1-800-435-4000. If you are a client of an independent investment advisor, contact Schwab Alliance at 1-800-515-2157. International clients, please call us at +1-415-667-7870 and Charles Schwab Hong Kong clients, please call +852-2101-0500. At June 30, and July 31, 2025, CS&Co had net capital of \$12.0 billion and \$10.9 billion, respectively, and a net capital requirement of \$2.2 billion and \$2.3 billion, respectively. A copy of the report may be requested via: Investor Relations, 3000 Schwab Way, Westlake, TX 76262. Independent investment advisors are not owned by, affiliated with, or supervised by CS&Co.

## Positions - Summary

Beginning Value as of 09/01	Transfer of Securities (In/Out)	Dividends Reinvested	Cash Activity	Change in Market Value	Ending Value as of 09/30	Cost Basis	Unrealized Gain/(Loss)
<b>\$243,957.29</b>	<b>\$0.00</b>	<b>(\$603.54)</b>	<b>\$831.98</b>	<b>\$7,865.77</b>	<b>\$252,051.50</b>	<b>\$219,018.72</b>	<b>\$25,852.10</b>

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.

41 *Coach and Coach Inventments*

Cash and Cash Investments						
Type	Symbol	Description	Quantity	Price(\$)	Beginning Balance(\$)	Ending Balance(\$)
Bank Sweep		CHARLES SCHWAB BANK <sub>X/Z</sub>			7,583.77	7,180.68
						(403.09)
<b>Total Cash and Cash Investments</b>					<b>\$7,583.77</b>	<b>\$7,180.68</b>
						<b>(\$403.09)</b>
						<b>3%</b>

## Positions - Mutual Funds

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	% of Acct
NTBIX	NAVIGATOR TACTICAL FIXED INCOME I	4,910.1020	9.67000	47,480.69	47,628.28	(147.59)	19%
<b>Total Mutual Funds</b>						<b>\$47,480.69</b>	<b>\$47,628.28</b>
						<b>(\$147.59)</b>	<b>19%</b>



Statement Period  
September 1-30, 2025

## Positions - Exchange Traded Funds

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Yield	Est. Annual Income(\$)	% of Acct					
SKYY	FIRST TRUST CLOUD	57,000	134.42000	7,661.94	7,724.50	(62.56)	N/A	N/A	3%					
SPMO	INVEST S P 500 MOMENTUM	180,000	121.06000	21,790.80	17,145.62	4,645.18	0.63%	138.03	9%					
IXUS	ISHARES CORE MSCI TOTL	411,000	82.58000	33,940.38	32,648.18	1,292.20	N/A	N/A	13%					
IVV	ISHARES CORE S&P 500	65,000	669.30000	43,504.50	34,611.29	8,893.21	1.19%	518.63	17%					
SOXX	ISHARES SEMICONDUCTOR	55,000	271.12000	14,911.60	12,436.44	2,475.16	0.79%	118.96	6%					
ITA	ISHARES US AEROSPACE	109,000	209.26000	22,809.34	17,808.15	5,001.19	1.43%	326.96	9%					
XME	SPDR S&P METALS & MINING	118,000	93.19000	10,996.42	8,891.43	2,104.99	0.43%	47.56	4%					
XPH	SPDR S&P PHARMACEUTICALS	210,000	47.94000	10,067.40	9,791.86	275.54	0.85%	86.21	4%					
SPYG	SPDR S&P 500 GROWTH ETF	44,000	104.51000	4,598.44	4,235.37	363.07	0.53%	24.45	2%					
VGX	VANGUARD COMMUNICATION	41,000	187.73000	7,696.93	7,634.60	62.33	0.96%	74.57	3%					
VGT	VANGUARD INFORMATION	26,000	746.63000	19,412.38	18,463.00	949.38	0.45%	89.29	8%					
<b>Total Exchange Traded Funds</b>				<b>\$197,390.13</b>	<b>\$171,390.44</b>	<b>\$25,999.69</b>	<b>78%</b>	<b>\$1,424.66</b>	<b>78%</b>					
Beginning Cash* as of 09/01	+	Deposits	+	Withdrawals	+	Purchases	+	Sales/Redemptions	+	Dividends/Interest	+	Expenses	=	Ending Cash* as of 09/30
<b>\$7,583.77</b>		<b>\$0.00</b>		<b>\$0.00</b>		<b>(\$52,355.94)</b>		<b>\$51,120.87</b>		<b>\$982.36</b>		<b>(\$150.38)</b>		<b>\$7,180.68</b>
Other Activity	<b>\$0.00</b>													
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.														

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 09/01	+	Deposits	+	Withdrawals	+	Purchases	+	Sales/Redemptions	+	Dividends/Interest	+	Expenses	=	Ending Cash* as of 09/30
<b>\$7,583.77</b>		<b>\$0.00</b>		<b>\$0.00</b>		<b>(\$52,355.94)</b>		<b>\$51,120.87</b>		<b>\$982.36</b>		<b>(\$150.38)</b>		<b>\$7,180.68</b>
Other Activity	<b>\$0.00</b>													



Schwab One® Account of  
THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CLERKS  
MGR: ENVESTNET ASSET MGMT

Statement Period  
September 1-30, 2025

### Transaction Details

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share(\$)	Charges/ Interest(\$)	Amount(\$)	Realized Gain/(Loss)(\$)
09/04	Expense	Advisor Fee *		TO ADVISOR				(150.38)	
09/09	Sale		EUFN	ISHARES MSCI EUROPE FINANCIALS ETF	(617.0000)	33.4231	0.10	20,621.95	4,069.69 (ST)
				Industry Fee \$0.10					
Sale		IAI		ISHRS US BRKRS DEALRS SCURTS EXCH ETF	(78.0000)	172.6600	0.01	13,467.47	2,240.39(ST)
				Industry Fee \$0.01					
Purchase			IXUS	ISHARES CORE MSCI TOTL INTL STCK ETF	235.0000	80.8297			(18,994.98)
Purchase		XRT		SPDR S&P RETAIL ETF	88.0000	87.1202			(7,666.58)
Purchase		VOX		VANGUARD COMMUNICATION SERVICES ETF	41.0000	186.2097			(7,634.60)
				BANK INT 081625-091525					0.31
09/16	Interest	Bank Interest X/Z		ISHARES CORE S&P 500					129.66
09/19	Dividend	Cash Dividend	IVV	ISHARES SEMICONDUCTOR					29.74
	Dividend	Cash Dividend	SOXX	ISHARES US AEROSPACE					81.74
	Dividend	Cash Dividend	ITA	SPDR S&P HOMEBUILDERS ETF	(85.0000)	110.7933	0.01	9,417.42	(402.86) (ST)
				Industry Fee \$0.01					
09/24	Sale		XHB	VANGUARD INFORMATION TECHNOLOGY ETF	13.0000	748.5956			(9,731.74)
Dividend	Cash Dividend	XHB		SPDR S&P HOMEBUILDERS					13.39
Dividend	Cash Dividend	XME		SPDR S&P METALS & MINING					11.89
Dividend	Cash Dividend	XPH		SPDR S&P PHARMACEUTICALS					21.55
Dividend	Cash Dividend	XRT		SPDR S&P RETAIL ETF					8.96
Dividend	Cash Dividend	SPYG		SPDR S&P 500 GROWTH ETF					6.11
09/26	Dividend	Cash Dividend	SPMO	INVSC S P 500 MOMENTUM					34.51
	Dividend	Cash Dividend	VOX	VANGUARD COMMUNICATION					18.64
Dividend	Cash Dividend	VGT		VANGUARD INFORMATION					22.32



Schwab One® Account of  
THE INTERNATIONAL INSTITUTE OF  
MUNICIPAL CLERKS  
MGR: ENVESTNET ASSET MGMT

Statement Period  
September 1-30, 2025

### Transaction Details (continued)

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share(\$)	Charges/ Interest(\$)	Amount(\$)	Realized Gain/(Loss)(\$)
09/29	Purchase	Reinvested Shares	NTBIX	NAVIGATOR TACTICAL FIXED INCOME I	62.4140	9.6700			(603.54)
	Dividend	Div For Reinvest	NTBIX	NAVIGATOR TACTICAL FIXED				603.54	
09/30	Sale		XRT	SPDR S&P RETAIL ETF Industry Fee \$0.01	(88.0000)	86.5232	0.01	7,614.03	(52.55) <sup>(ST)</sup>
	Purchase		SKYY	FIRST TRUST CLOUD COMPUTING ETF	57.0000	135.5175		(7,724.50)	
<b>Total Transactions</b>							<b>(\$403.09)</b>	<b>\$5,854.67</b>	

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

### Bank Sweep Activity

Date	Description	Amount	Date	Description	Amount
09/01	<b>Beginning Balance</b> <sup>x,z</sup>	<b>\$7,583.77</b>	09/25	BANK CREDIT FROM BROKERAGE x	6.11
09/05	BANK TRANSFER TO BROKERAGE	(150.38)	09/26	BANK CREDIT FROM BROKERAGE x	75.47
09/09	BANK TRANSFER TO BROKERAGE	(206.74)	09/30	BANK TRANSFER TO BROKERAGE	(110.47)
09/15	BANK INTEREST - CHARLES SCHWAB BANK	0.31	09/30	<b>Ending Balance</b> <sup>x,z</sup>	<b>\$7,180.68</b>
09/19	BANK CREDIT FROM BROKERAGE x	241.14	09/30	<b>Interest Rate</b> <sup>* z</sup>	<b>0.05%</b>
09/24	BANK TRANSFER TO BROKERAGE	(258.53)			

\* Your interest period was 08/16/25 - 09/15/25. <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 one or more FDIC-insured Program Banks. Charles Schwab & Co., Inc. is not an FDIC-insured bank and deposit insurance covers the failure of an insured bank. Certain conditions must be satisfied for FDIC insurance coverage to apply. Please review the Cash Features Program Disclosure Statement for a list of the Program Banks at schwab.com/cashfeaturesdisclosure.

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.

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# INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS



**To: IIMC Board of Directors**

**From: Karen Lee, Director of Communications**

**Date: October 9, 2025**

**Subject: Communications Midyear Report - 2025**

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

IIMC 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.

## 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 the open average rates below<sup>1</sup>.

- E-Briefing (Region I-IX) average open rate: **41%**
- E-Briefing (Region X) average open rate: **33%**
- E-Briefing (Region XI) average open rate: **30%**

## FOUNDATION NEWSLETTERS

The inaugural quarterly newsletter for the IIMC Foundation launched in April 2025. The newsletter is a joint effort between the IIMC Foundation and IIMC and is distributed to Regions I – IX.

- IIMC Foundation Newsletter – April 2025 open rate: **37%**
- IIMC Foundation Newsletter – July 2025 open rate: **43%**

## REGION NEWSLETTERS, MESSAGES, AND UPDATES

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

<sup>1</sup> According to the Google Gemini AI engine: a good email open rate is between 17% - 28%; a solid/above average open rate is above 30%; a strong open rate is between 45% - 50%; and an exceptional open rate is above 50%. (Accessed October 9, 2025)

## **Region Communications Metrics:**

- **Region III**
  - Region III Newsletter – Spring 2025 open rate: **46%**
  - Florida: FACC Summer Conference and Academy open rate: **55%**
  - Region III Newsletter – Fall 2025 open rate: **47%**
- **Region IV**
  - Region IV Newsletter – 2026 Region IV Meeting open rate: **58%**
- **Region V**
  - Region V 2025 May Announcement open rate: **44%**
- **Region VIII East**
  - 2025 Summer Newsletter open rate: **44%**
- **Region VIII West**
  - 2025 Spring Newsletter open rate: **46%**
- **Region X**
  - Region X Newsletter – April 2025 open rate: **47%**
- **Region XI**
  - Region XI Newsletter – 2025 September open rate: **31%**

## **IIMC Departments and Leadership Message Metrics**

- **IIMC Executive Director's Updates**
  - April 3, 2025 open rate: **38%**
  - April 16, 2025 open rate: **41%**
- **IIMC Leadership Updates**
  - IIMC President's Message – April 30, 2025 open rate: **41%**
  - 2025 VP Election Announcement – May 2025 open rate: **36%**
  - IIMC Board of Directors Update – May 6, 2025 open rate: **38%**
- **IIMC Departments Updates**
  - Communications Announcement – 80<sup>th</sup> Anniversary Logo Contest open rate: **47%**
  - Education Update – EPP Cohort 1 – July 21, 2025 open rate: **59%**
  - Education Update – EPP Cohort 1 – August 21, 2025 open rate: **63%**
  - Membership Update – December Dues Members – October open rate: **50%**

## **NEWS DIGEST**

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

A longstanding goal for The *News Digest* has been to increase content authored by members. The IIMC Public Relations and Marketing Committee and IIMC International Committee continue to submit profiles and articles. Content created by and written about Clerks continues to be the most popular among readers.

## **COMMUNICATIONS AND EDUCATION**

The Communications Department continues to work closely with the Education Department to market its programs and resources.

## ONLINE VIDEOS

As a part of IIMC Past President Lisa Garcia's President-Membership recorded events, the Communications Department produced a [recording](#) of the 2024-2025 third-year board members' interviews.

## SOCIAL MEDIA - Facebook

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

Group	September 2025	March 2025
Region I	297	280
Region II	337	331
Region III	822	803
Region IV	305	278
Region V	438	386
Region VI	230	216
Region VII	362	337
Region VIII East	116	97
Region VIII West	97	86
Region IX	334	329
Region X	121	111
Region XI	96	95
EPP Cohort 1	46	44

## RECOMMENDATION

The Communications Department submits to the Board of Directors the following recommendation:

- **Video of Departing Board Members, 2025-2026.** There were many lessons learned from the production of the 2024-2025 third-year board members video. The Communications Department recommends endeavoring another video of departing board members, 2025-2026, for which the shoot may during the 2025 Mid-Year meeting.

## Management's Comments:

The amount of work keeping members informed is evident through the high percentages of member engagement via the communications. To average 30% plus open rate is extremely high for an association. This number also helps in recruiting new vendors and sponsors, since members' interest in their Association is encouraging. The Foundation newsletter is new and could possibly attract additional donors. We are looking to hire another individual in Communications, pending budget, to continue expanding this area, bringing additional value to members.

Attached is the Communications Department's Board meeting live broadcast analysis.

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Board of Directors

**From:** Karen Lee, Director of Communications  
Chris Shalby, Executive Director

**Date:** October 1, 2025

**Subject:** Board Meeting Live Broadcast Analysis

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### **VIRTUAL (ZOOM) MEETINGS**

**Equipment:** Standard (computer)

**Tools:** Zoom; YouTube

**Cost:** None

**Description:** Zoom meeting connected to a YouTube live feed.

Viewers would not be on the Zoom platform. They would have a YouTube link that would give them access to “view only” the broadcast via IIMC’s YouTube channel. There is capability to turn on or off YouTube chat, but regardless, these discussions are separate from the Zoom meeting; Zoom participants would not see YouTube viewers nor would they see their chat. Should the meeting go into Executive Session, the YouTube button would be deselected, and the YouTube screen would go dark/silent. When Executive Session concludes, the YouTube button would be reengaged, and the broadcast would resume.

**Operation consideration:** There is precedent for broadcasting live via this method. Communications Department has no concerns about operability.

### **IN-PERSON MEETINGS: THIRD PARTY**

**Equipment:** Provided by third party

**Tools:** Provided by third party

**Cost:** **Varying** cost as quoted by location’s A/V provider. (E.g., Peppermill Hotel quote for providing board meeting broadcasts is approximately **\$1,500/day**)

**Description:** For this option, IIMC would contract with the location’s A/V company to broadcast the meeting via live feed. The A/V company would provide high quality video and sound and broadcast via a link that they would share.

**Operation consideration:** Hasn’t been attempted before, requires reliance on A/V company technicians. Should the meeting go into Executive Session, the board would have to coordinate with the A/V room technician to cease and resume broadcast.

### **IN-PERSON MEETINGS: IN-HOUSE: MULTI-CAM/MULTI-ANGLE**

**Equipment:** standard (computer), cameras (phone or tablet), camera stands, sound output cable

**Tools:** DroidCamX HD App; YouTube

**Cost consideration:** Requires stable and strong wi-fi or hard-wired internet access: **\$275/day**; App: **\$4.99**; 360-degree camera, one time purchase **\$500**. Access to sound output cable: *Possible varying* cost as quoted by location’s A/V provider. The Peppermill Hotel is willing to provide a sound output cable free of charge.

**Description:** Cameras and/or tablets connected to computer using a streaming app, would stream the video to a YouTube live feed. Audio would transfer via sound output cable. Viewers would not be on the Zoom platform. They would have a YouTube link that would give them access to “view only” the broadcast via IIMC’s YouTube channel. There is capability to turn on or off YouTube chat, but regardless, these discussions are separate from the Zoom meeting; Zoom participants would not see YouTube viewers nor would they see their chat. Should the meeting go into Executive Session, the YouTube button would be deselected, and the YouTube screen would go dark/silent. When Executive Session concludes, the YouTube button would be reengaged, and the broadcast would resume.

**Operation consideration:** Might be a distraction for meeting participants. Hasn't been attempted. Requires trial.

## **IN-PERSON MEETINGS: IN-HOUSE: ONE WIDE SHOT**

**Equipment:** standard (computer), camera (phone or tablet), camera stand, sound output cable  
**Tools:** DroidCamX HD App; YouTube

**Cost consideration:** Requires stable and strong wi-fi or hard-wired internet access: **\$275/day**; App: **\$4.99**; Access to sound output cable: *Possible varying* cost as quoted by location's A/V provider. The Peppermill Hotel is willing to provide sound output cable free of charge.

**Description:** Camera or tablet connected to computer via wi-fi using a streaming app, would stream the video to a YouTube live feed. Audio would transfer via sound output cable.

Viewers would not be on the Zoom platform. They would have a YouTube link that would give them access to “view only” the broadcast via IIMC’s YouTube channel. There is capability to turn on or off YouTube chat, but regardless, these discussions are separate from the Zoom meeting; Zoom participants would not see YouTube viewers nor would they see their chat. Should the meeting go into Executive Session, the YouTube button would be deselected, and the YouTube screen would go dark/silent. When Executive Session concludes, the YouTube button would be reengaged, and the broadcast would resume.

**Operation consideration:** The camera is stationary, the shot would not be dynamic, and the staff side of the meeting would have their backs to the camera. Hasn't been attempted. Requires trial.

## CLOSE CAPTIONING AT CONFERENCE

The cost of close captioning – Opening Ceremony, keynote speakers and concurrent sessions.

The Cost is approximately \$375 per hour.

Opening Ceremony is 2 hours -- \$\$750

2 Keynote Sessions – each 1 hour \$750

Concurrent Sessions is not available

## Management's Comments:

This report is for information. However, the Board can take action on these topics. In speaking with IIMC's attorney Rosa Cumare, regarding recording virtual meetings, below is her answer:

*In California audio recordings of conversations that are private or have a reasonable expectation of privacy are only allowed if all those who may be recorded consent. A board meeting of a non-governmental entity is by definition a private meeting. Therefore, if you want to record, at the outset of the meeting during rollcall everyone has to agree or, if that person does not agree, you can either ask that person to leave the meeting and you record or the person stays and you don't record.*

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

**To:** IIMC Board of Directors

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

**Date:** October 10, 2025

**Subject:** Member Services Midyear Report -- 2025

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Our association software (iMIS) has made many improvements for Member Services, but we are not done yet. The additions to customer service have been:

- 1) Online Conference Registration –  
The online conference registration had further improvements in 2024 such as the First-Time attendees and Region VII delegates automatically receiving their \$50.00 discounts without having to use a discount code. We are working to streamline the registration process in hopes of making it easier and more efficient for Exhibitors as well.
- 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 members.
- 5) **NEW** in 2025 - IIMC dues renewals are being emailed to our members starting with the December 31, 2025-2026 cycle. This is a great advancement for IIMC. Our concerns are that firewalls may block our emails, but we will work through each bounce back. The Member will be able to go directly to their member profile and renew their dues with a credit card or send in a check. They will receive a receipt for their payment.

IIMC is awarding one-year free membership to any clerk in Nevada that has never been an IIMC Member if they register and pay for the conference in Reno. They will receive First Time and Region Discounts. A letter and a special conference free membership application will be sent to Host Committee Chair, Dr. LuAnn Holmes, MMC, for distribution to all Nevada Clerks.

Our Reno conference registration database is being updated and will soon be available for our members to register online.

We are very pleased with the 22-25 Member Drive since starting promotion in late December 2022 and it has brought in 511 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.

Since May 2025, our Region Director Challenge has brought in one new IIMC member, thanks to the recruitment efforts of **Julie Barnett, MMC**. Thank you, Julie, for your continued support of IIMC's membership growth initiatives!

We are hoping to see stronger results by March 2026, as the Challenge continues. The winning Region Director will receive **two complimentary conference registrations** for the upcoming **Reno Conference**.

A Region Director Challenge Application is available in the IIMC Board section of the website, or you can request a copy by contacting Member Services directly.

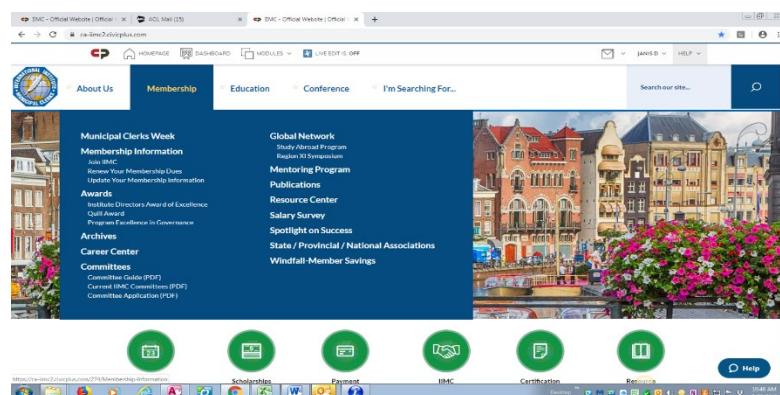
The Region Director Challenge has been part of IIMC's membership efforts since **2010**. Over the past 15 years (excluding 2020), we have:

- Averaged **26 new members per year** through this program
- Awarded **28 free conference registrations** to **14 winning directors**
- Given away a total estimated value of **\$18,200** (based on an average registration cost of **\$650**)

As we review the results from this year, it may be time to consider whether this program continues to deliver value for our Board and the organization as a whole — both in terms of membership growth and financial impact.

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 have always mailed 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

NEW – All of the above will now be **emailed** to our membership. Region Directors, please be sure to encourage your Region to verify they have updated their email addresses with IIMC.

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. Since its inception, we have assisted 19 of our members.

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 send out 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!

We have added CMC links to our emailed Welcome Letter that goes to each new member directly from the Member Services Staff. The links give the new members the following:

- Link 1 is the new members state/province institute
- Link 2 is for the CMC Step by Step information page
- Link 3 is for the CMC video

The Welcome Letter also has their Member Type and Member ID number. It states that they are to watch for the weekly E-Briefing and e-News Digest along with further information about their membership and annual conference.

We are also distributing, every quarter, a letter that goes to the new members asking them if they have sent in their CMC Enrollment Form and if not, to please call IIMC if they have questions about certification. We find that most cancellations come from one-year members. You get from your new membership what you put into it. This letter helps them to take the first step towards their new profession.

Member Services will distribute to Regions I to X, the 2025 Salary Survey in early November 2025. The 2023 survey received only 1,737 responses; 2020 Salary Survey had 3,068 responses and 2018 had 3,135 responses. It is very disappointing that out of 9,100 members we only received 1,737 participants. Please discuss with your regional members how important it is they take part in IIMC’s Salary Survey. We can do better, and this helps all our membership when doing research for a title change, promotion, and a pay raise.

Our Member Services Staff, Tammy Storrie, Assistant Director of Member Services and Stephanie Galarza, Member Services Representative, work very hard to reach out to our

members with phone calls and emails each day. It is a true pleasure to work in Member Services. Stephanie has represented IIMC at the APT US&C and at ICMA this year.

Sharing some statistics for the following:

- Region Totals as of October 10, 2025 are:
  - Region I – 699
  - Region II – 598
  - Region III – 1,820
  - Region IV – 64
  - Region V – 94
  - Region VI – 518
  - Region VII – 817
  - Region VIII East – 744
  - Region VIII West - 624
  - Region IX – 1,875
  - Region X – 198
  - Region XI – 5,906
  - Grand Total of Members – 15,404
- Bulk Members in Region XI are from the following Associations:
  - ADSO United Kingdom – 1,539 members
  - IMASA South Africa – 125 members
  - SLCC United Kingdom – 3,664 members
  - VVG The Netherlands – 576 members

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

The Department is constantly researching methods of attracting new members and maintaining current ones. The personal outreach has always been a staple of this Department, ensuring members receive the utmost in client services as well as encouraging new members toward IIMC's certification programs. The renewal dues process, streamlined via email, should not only expedite payments to HQ, but save on overall postage and mailing costs, which will help the budget's bottom line. We appreciate everything they do, especially working with the Membership/Mentor Committee and their commitment to members.

## INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS



**To:** IIMC Board of Directors

**From:** Tom van der Hoven  
Region XI Development Consultant

**Date:** October 14, 2025

**Subject:** Region XI Consultant Midyear Report - 2025

The purpose of my report is to inform the Board of the focus of my work as Region XI Development Consultant in 2025/26 and to seek the Board's input and support.

### **Background:**

This is my eighteenth 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 September 2025. The next meeting will be held in November 2025.

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 September 2025 and the next one is scheduled to be published early 2026.

### 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 5400 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.

The current debate and questions about the bulk membership scheme is causing concern amongst the associations in Region XI and the sooner this issue can be put to rest the better for everyone.

### 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. 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 2025 the contribution 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.

The Study Tour and Symposium was again a great success. 33 Members from the US, Canada and the Netherlands participated. Unfortunately a few of those who had initially registered, had to withdraw due to personal circumstances.

This was the ninth Study Tour since the first held in 2007. The tour kicked off on Saturday September 6, 2025 in Windsor. The group then travelled to Stratford-upon-Avon on the Monday and visited Warwick Castle the evening for a tour and dinner.

On Tuesday the group travelled to Chester - 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. Following a tour of the city, the group was joined for lunch by the Lord Mayor of Chester Councillor Cherin Akhtar. She spent quite some time over lunch talking with smaller groups. Following lunch, the group had a very interesting presentation on the Mayoral Regalia and the history of it.

Late Tuesday afternoon the group travelled to its final destination. 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.

On Wednesday members had the opportunity to explore Liverpool on their own or in smaller groups. ADSO hosted a dinner that evening for the tour group, our Region Directors, ADSO Board members and Region XI delegates registered for the Symposium/Conference. On behalf of the group, Stephen Huycke from Canada and IIMC Board member, thanked ADSO for the event.

On Thursday and Friday the group joined the IIMC Symposium/ADSO Conference. Past President of IIMC, Stephanie Kelly MMC, addressed the delegates at the opening session.

The two days offered several plenary sessions and a variety of workshops. On Friday afternoon Board Member Stephen Huycke together with two panellists ran a workshop on “Multi-Location (Hybrid) Meetings: learning from the international experience.”

John Austin stepped down as Chair of ADSO on Thursday evening and handed the reigns over to Peter Sass from Richmond and Wandsworth Councils. Peter has been to a number of IIMC conferences and we have a very good working relationship with him.

Unlike previous Symposiums, Executive Director Shalby and I primarily focussed on the Study Tour whilst the Thursday and Friday programs were planned by ADSO’s conference team.

Feedback on both the Study Tour and Symposium/Conference has overwhelmingly been positive and a number of constructive comments have been made which should improve future arrangements. It was interesting, and also gratifying, to note that some of the group members were attending their 4<sup>th</sup>, some 3<sup>rd</sup> and some 2<sup>nd</sup> study tour! We must be doing something right! We are already being asked where the next one is going to be! Executive Director and I will start to look into options early in 2026.

### **International Buddy Program**

The Region XI Management Board received a presentation from Region Director Linda Larter, Tine Vervisch of Exello.Net of Belgium and Gemma Rickard of SLCC on a relaunch of the buddy scheme – “Clerks without Borders. What could you learn from another clerk?”

New promotional material have been produced. It will kick off with a hard launch at the SLCC Conference in October followed by regular member updates via newsletters and online. There will also be an exhibit in the exhibition area at the Reno conference .

### **Opening Ceremony Flag and Anthem Challenges**

Some members may be aware that there were some technical difficulties at the opening ceremony this year in St Louis which impacted on Bermuda and its representative.

In order to give some clear guidance to staff as far as Region XI’s situation, and especially that of Bermuda and the UK, is concerned the Region XI Management Board considered various options. What could be confusing is the fact that some countries have different

anthems and flags. For example the UK's national flag is the Union Jack but England, Wales, Scotland and Ireland each have their own flag.

Without going into detail, a simplified arrangement has been suggested to the Executive Director and staff and which would make their life a lot easier in planning the event!

### **Conference Planning and Region XI Presentation**

The Region XI Management Board is due to meet in November to discuss plans for the May IIMC conference in Reno. They agreed to focus on planning Region XI's presentation at the conference and to consider making suggestions regarding the yearly International Reception.

### Focus for 2025/26

The Region XI Management Board will review the Region XI Strategy at an upcoming meeting in November 2025.

### **Recommendation:**

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

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

Many thanks to Tom for all the work he does in this Region. The 2025 Study Abroad/Symposium was well attended and Tom was able to oversee the group in September as I was unable to assist him. We are looking forward to a revised Opening Flag Ceremony process regarding Region XI and the national anthems. IIMC Staff has helped with the International Buddy Program, both in the News Digest and on the website. As of this writing, we have not held the meeting with Region XI, but will update you verbally during the midyear meeting. We also wish former co-founder and Chairperson of ADSO, John Austin, the very best in retirement.



# International Institute of Municipal Clerks





# Who am I?

Steph Palmateer, AMCT

Director of Community Services & City Clerk for the City of Timmins  
1 of 2 Directors from Region X (Canada) of the IIMC Board

Past President of AMCTO (2016-2017)

Timmins City Clerk since 2013 with 32 years municipal experience.



# Mission Statement

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.



# Core Values

**Integrity:** We adhere to the tenets of honesty, transparency, consistency and respect.

**Diversity and Inclusivity:** We embrace diversity and equality by committing to creating and maintaining an environment that is inclusive of all.

**Professionalism:** We strive for excellence within our profession.

**Communication:** we promote the connection of members worldwide with the purposeful sharing of information, knowledge, and educational opportunities.

**Innovation:** We commit to continuous improvement of services and policies through collaboration, creativity and technology.



# Vision Statement

The primary purpose for the International Institute of Municipal Clerks (IIMC) is to provide education and professional development programs and opportunities for its members. IIMC recognizes that education and professional development are important to every member and that educational needs are diverse throughout the world.

# Who we are



- Founded in 1947.
- The leading professional non-profit association of Municipal Clerks, Secretaries and Recorders from towns and cities around the world.
- 15,600+ members worldwide representing municipalities of every size.
- Governed by a Board of Directors and IIMC's Constitution and Policies.
- Board of Directors is comprised of 28 members including: President, Immediate Past President, President Elect, Vice President and two board members from each of the 11 Regions. 3 year terms.



# Membership Benefits

- IIMC source for educational programs, technical support, resources and publications
- Networking
- Resource Center
- Publications
- Education
- Professional Support
- Certification Programs
- Advanced Academy
- Annual Conference



## Benefits cont.

- Designations – Certified Municipal Clerk (CMC) & Master Municipal Clerk (MMC)
- Additional benefits for Region X (Canada)
  - Transitioning from a points based designation system to an hours-based system for CMC and MMC applications. (launched in 2025)
  - Better alignment with transcripts and supporting documentation.
  - Region X membership dues/fees frozen until 2030 at \$180.00 US. Additional membership fees are \$125.00 US.



# IIMC – Strategic Plan

- The IIMC Strategic Plan identified seven key areas (listed below) and have created corresponding performance and process objectives.
  - IIMC Image – internal/external
  - IIMC Communications – Internal/external
  - IIMC Organization and Management
  - IIMC Education
  - IIMC Membership
  - IIMC Finance
  - IIMC Conference



# International Study Abroad Tour

- Every two years IIMC hosts an International Study Abroad Tour
  - Available to all members
  - An international educational and networking opportunity
  - Attend an International Municipal Clerk/Professionals conference
  - 2025 tour was in England
  - The tour visited the following cities/municipalities: Windsor, Stratford on Avon, Chester and Liverpool
  - Attended the annual Association of Democratic Services Officers Conference and Awards (ADSO)



# Regions X and XI Affiliate Associations

- IIMC has affiliation agreements with the following Canadian Region X associations:

- AMCTO
- LGMA (Local Government Management Association of British Columbia)
- AMCA (Alberta Municipal Clerks Association)
- PMA (Professional Municipal Administrators of Newfoundland/Labrador)

- IIMC Region XI affiliates:

- ADSO (United Kingdom), SLCC (United Kingdom), ATAM (Portugal), UDIITE (Europe), IAM (Israel), SOLAR (Scotland, UK), Exello.net (Belgium), IMASA (South Africa), VVG (Netherlands) & NAMCB (Bulgaria)



## IIMC Foundation

- Fundraising arm of IIMC
- Independent Board of Directors
- Charitable Status
- Interest revenue funds IIMC programs and projects
- Contributes to IIMC Educational programs



## **International Institute of Municipal Clerks (IIMC)**

### **Social Media Policy**

Section:

- 1.10.010      Purpose
- 1.10.020      Definitions
- 1.10.030      Scope
- 1.10.040      Policy

#### **1.10.010**

##### **Purpose**

The purpose of this policy is to establish standards and expectations for the use, management, and oversight of social media platforms and website operated by the International Institute of Municipal Clerks (IIMC). As an international membership organization, IIMC recognizes the importance of social media in disseminating timely and relevant information, building community, and promoting professional development opportunities for municipal clerks around the world.

#### **1.10.020**

##### **Definitions**

- A.      “Post” means the action of publishing a piece of content (text and/or images) to a social media platform, and includes sharing a piece of content on another social media page to the particular social media platform.
- B.      “Comment” means adding a remark or observation about a post.
- C.      “Candidate” means a Member whose application to be a candidate for election to the Board of Directors.
- D.      “Campaign Period” means the period of time during which a Candidate is permitted to campaign under the Elections Policy.
- E.      “IIMC Facebook Page” means the Facebook page established by IIMC for the entire association
- F.      “Region Facebook Page” means the individual Facebook pages established for each of IIMC’s Regions
- E      “social media platforms” means, individually and collectively, the IIMC website ([www.iimc.com](http://www.iimc.com)), social media and other electronic internet-based communications tools authorized by the Board of Directors to promote IIMC.

## 1.10.030

### Scope

This policy applies to all social media platforms and websites created and managed by IIMC staff, members of the IIMC Board of Directors, and any authorized representatives acting on behalf of IIMC.

## 1.10.040

### Policy

#### Intended use for social media platforms

At IIMC, it is imperative that we distribute timely information to the right Clerk at the right time. Social Media assists in disseminating this information. IIMC's social media platforms are intended to:

1. **Increased Awareness and Visibility:** Social media allows IIMC to reach a vast and diverse audience, making it easier to introduce the organization to potential members. By creating engaging content and actively participating on various platforms, IIMC can significantly increase its visibility and recognition.
2. **Member engagement:** Social media provides a direct channel for the organization to interact with its members in real-time. This allows for the opportunity to build stronger relationships with its members.
3. **Building Organizational Loyalty and Trust:** By consistently providing valuable content, engaging with members, and addressing their concerns, IIMC can build trust and loyalty among its followers. Positive word-of-mouth on social media can significantly impact the organization's reputation and membership base.
4. **Humanize IIMC:** The ability to create real human connections is one of the key benefits of social media for IIMC. Introducing our members to the people who make up IIMC, its Board and its 11 Regions assists in showcase how existing members are benefiting from the organizations and sharing "Clerk" ideas in real life, and how IIMC is putting the interests of its members first.
5. **Increase website traffic:** Social media posts are ways to drive traffic to IIMC's website by sharing great content from each region or the website to our social channels.

### **Official IIMC social media platforms:**

Only social media platforms approved by the IIMC Board of Directors shall be recognized as official communication channels of IIMC. As of the adoption of this policy, the approved platforms include:

1. **Facebook®:** Used primarily for community engagement, updates, event promotion, and highlighting member achievements. Facebook allows for real-time interaction with members and encourages recognition and participation.
2. **Instagram®:** A visual platform used to showcase IIMC events, behind-the-scenes activities, campaigns, and initiatives. Instagram is ideal for promoting IIMC culture, conferences, and membership milestones through images and short videos.
3. **LinkedIn®:** A professional networking platform focused on governance updates, leadership development, professional opportunities, and recognition of member certifications and accomplishments. Content is tailored to enhance the professional identity of clerks and build relationships with government and nonprofit partners.

### **Who May Post to the IIMC Website**

Only IIMC Staff may post to the IIMC Website.

### **Who May Post to the IIMC Facebook Page**

Generally only IIMC Staff may post to the IIMC Facebook Page. Members of the Executive Committee or Board of Directors may also post to the IIMC Facebook Page when promoting work they are doing on behalf of IIMC as a Board Member.

### **Who may Post to a Region Facebook Page:**

Only the Region Directors (or the Region Directors designee), Executive Committee Members, IIMC Foundation, IIMC Staff may post to a Region Facebook page.

Candidates may post during the campaign period only and only after complying with elections policies

### **Who may Post to any other social media platforms:**

- A. Generally only IIMC Staff may post to other social media platforms that target the entire membership. Members of the Executive Committee or Board of Directors may also post to these platforms when promoting work they are doing on behalf of IIMC as a Board Member.
- B. Only the Region Directors (or the Region Directors designee), Executive Committee Members, IIMC Foundation, and IIMC Staff may post to other social media platforms that target only one Region. Candidates may post during the campaign period only and only after complying with elections policies

## **Commenting on Posts**

IIMC Members will observe the Code of Conduct and Posting Guidelines when commenting on a Post.

## **International Communications Consideration**

As an international organization representing members from diverse cultures, legal frameworks, and time zones, IIMC relies on a variety of social media platforms to ensure broad and timely distribution of information. These platforms allow IIMC to maintain transparent communication, offer global networking, and share updates that are essential to our operations and mission.

## **Code of Conduct and Posting Guidelines**

All content posted to official IIMC social media platforms must comply with the following standards:

1. Posts and comments must reflect IIMC's mission, values, and commitment to professionalism, inclusivity, and ethical leadership.
2. Content shall not include discriminatory, defamatory, harassing, political, or inflammatory language or imagery.
3. No confidential or privileged information shall be posted on any platform.
4. All public statements must be factual, respectful, and avoid speculation or misrepresentation.

## **No Expectation of Free Expression**

- A. IIMC social media platforms are not public forums and are governed by the organization's constitution and policies. As a private organization, the First Amendment right to free speech does not apply to IIMC's private platforms. IIMC reserves the right to remove, reject, or block any content or user that violates this policy or any policy of IIMC or is inconsistent with IIMC's purpose and professionalism.
- B. Posts or comments that are off-topic, offensive, contain misinformation, promote commercial products or political views, are contrary to the Code of Conduct and Posting Guidelines or otherwise conflict with IIMC's standards may be deleted at the discretion of IIMC staff or the Executive Director.

## **Violations and Enforcement**

- A. IIMC Staff, Board members, Candidates, and members must follow this and other applicable policies when posting or commenting on social media platforms.
- B. Any violations of this policy may result in the following actions, depending on the severity and frequency of the infraction:

1. Removal of content from social media platforms
2. Temporary or permanent suspension of any ability to Post or Comment on any social media platforms
3. Temporary or permanent suspension of access to IIMC social media platforms.
4. Other actions in accordance with other IIMC Policies.

C. Removal of a posting is at IIMC's sole discretion. IIMC will notify the individual and provide a statement regarding the removal.

D. A person may appeal a decision to temporarily or permanently suspend the ability to post or comment or access any social media platforms to IIMC's Executive Director, who may refer the matter to the Board; however, the decision to reinstate permission to post is at IIMC's sole discretion and not subject to further appeal.

### **Administration and Oversight**

All official IIMC social media platform accounts shall be created, managed, and overseen by IIMC staff under the direction of the Executive Director.

### **Selection of Social Media Platforms**

- A. There are thousands of social media platform applications. Common applications can allow users to stream video and music, post photos, and view and subscribe to RSS feeds. While some may be useful to the page's mission, they can cause confusion and security risks.
- B. A social media platform should not be used unless it aligns with the intended uses referred to in this policy, serves a credible business purpose, adds to the user experience and IIMC's mission statement, comes from a trusted source and has been reviewed and approved by the Board on the advice of IIMC Staff.
- C. Use of a social media platform may be removed at any time if there is significant reason to think it is causing a security breach or spreading viruses.

### **Boilerplate and Style**

- A. IIMC wishes to maximize the effectiveness of its web/Internet presence. Therefore, the following general principles should be followed whether creating a stand-alone website, participating in social media platforms or engaging in any other web/Internet presence that may arise in the future:
  1. Select the format that best enhances IIMC's visibility, is the easiest to customize and provides accessible means of measuring readership and membership use.
  2. Identify IIMC as 'Non-profit Association.

3. Clearly identify accounts for IIMC representative users – e.g., President, Executive Director, etc.
- B. When possible, given the medium, the IIMC logo should be included on all social media platforms.
- C. All social media platforms should include a link to the website ([www.IIMC.com](http://www.IIMC.com)) where permitted and appropriate.
- D. A short mission statement (should conform to website) should be included where permitted and appropriate.

“The International Institute of Municipal Clerks (IIMC) is a professional, nonprofit association that promotes continuing education and certification through university and college-based institutes and provides networking solutions, services and benefits to its members worldwide.”
- E. IIMC social media platforms will use proper grammar and standard AP style, avoiding jargon and abbreviations.

### **External Links**

External links included on the Website, or any other social media platforms are provided for convenience, but they are beyond IIMC's control. IIMC makes no representation as to their content or computer safety. Use of or reliance on any external links and their content is at the user's own risk. When visiting external links users must refer to that external website's terms and conditions of use. social media platforms should include an appropriate disclaimer wherever possible.

### **Coordinating Postings**

IIMC's Communications Coordinator is the primary individual authorized to post on IIMC's social media platforms on behalf of IIMC. The Communications Coordinator will be the gateway to approving the following information:

1. All industry-related content to include stories and pictures. Government affairs, public relations, media affairs, association/industry news
2. Marketing, promotion, industry articles and information
3. The “fair use” doctrine which allows quotation or copying of small portions of copyrighted materials applies only in limited circumstances. Check with counsel when in doubt.
4. Obtain written permission before posting photographs of minors. Never provide personally identifiable information about a minor.
5. Obtain written permission before posting photographs of individuals that were not taken in a public setting

### **Success Rates**

- A. IIMC's Communication Officer will be responsible for developing measurements to

determine how well IIMC's social media platforms are achieving the stated goals.

- B. Types of measurements will include, but not be limited to:
  - 1. Number of comments per posts.
  - 2. Number of times posts or comments within posts are removed monthly and the reason the posts are removed.
  - 3. Number of new members generated through social media posts.
  - 4. Number and type of complaints.
- C. IIMC's staff is responsible for helping identify interesting topics to post and for sharing these ideas with the communications coordinator.

### **Supporting use of Region Facebook Pages**

- A. Board Directors should not be obligated to use personal social media accounts for the purpose of posting to IIMC social media platforms
- B. Where possible, IIMC Staff will assist Region Directors in accessing and posting to social media platforms using a social media account established by IIMC for the benefit of the Region Director.