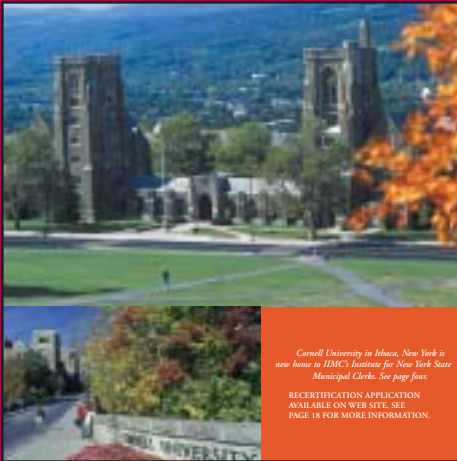


# Annual Report 2004

## *Racing Toward The Future*

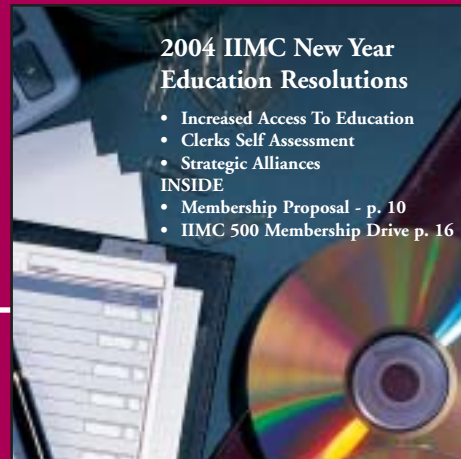


- The University of Tennessee (above) is new host to IIMC Institute, page 5
- MCEP new scholarship programs, pages 10-11
- Distance Education - Learning, Certification Opportunities, page 12
- Save \$50.00 on your membership dues, page 18



*Cornell University in Ithaca, New York is  
new home to IIMC's Institute for New York State  
Municipal Clerks. See page four.*

RECERTIFICATION APPLICATION  
AVAILABLE ON WEB SITE. SEE  
PAGE 18 FOR MORE INFORMATION.



### 2004 IIMC New Year Education Resolutions

- Increased Access To Education
  - Clerks Self Assessment
  - Strategic Alliances
- INSIDE
- Membership Proposal - p. 10
  - IIMC 500 Membership Drive p. 16



INTERNATIONAL INSTITUTE  
OF MUNICIPAL CLERKS

**IIMC Mission Statement**

Professionalism In Local Government  
Through Education

## PRESIDENT'S MESSAGE



*"Vision without action is merely a dream. Action without vision just passes time. Vision with action can change the world. A true leader must first see an idea as opportunity, then choose to act upon it."*

I began my year as the 45th President of IIMC promising that my goal for the year would be to assist IIMC in achieving its vision by acting upon its opportunities. I could not have written a better script than the one that has played out this year. What a year this has been!

I am keenly aware that many successes in life come to us because we are in the right place at the right time. So, if I am to be totally honest, I have to admit that much of what I will report in this document is due in large part to the solid groundwork of some of the progressive, visionary and innovative leaders that came before me. They had vision: they saw ideas as opportunities and were not afraid to act on them. What wonderful leaders IIMC has had over the years. I consider myself fortunate to have worked alongside such dedicated and committed individuals and to have the opportunity to write the next chapter in IIMC's success story.

I promised when I took office in May of 2003 that this would be a year of celebration for our noble and honorable profession. I chose *"Municipal Clerks: Simply The Best"* as the theme for the year in furthering my belief that Municipal Clerks are the most trusted, dependable, dedicated, competent and conscientious among public servants. As I have had the opportunity to interact with so many of you over the past year, I have not changed my mind. In fact, my conviction has deepened. You are indeed "better than all the rest." I have been the true beneficiary of the relationships and friendships I have cultivated as I have traveled through

out North America and abroad to visit the State and Provincial and National Associations outside of North America.

As I began this year, I announced that several initiatives critical to IIMC's future have been initiated by previous administrations and were already underway; specifically, implementing the recommendations relative to education that emerged from Education Summit II and the recommendations of the Membership Review Task Force. Because of their significance, I believe the success or failure of these initiatives will have a direct bearing on IIMC. It has been my goal this year to move them forward.

Though there are members who are still not sure that some of the educational initiatives will benefit the Organization as a whole, they have been generally accepted and progress is being made. One member recently said to me that she is in favor of any policy that will improve the status of our profession and cause Municipal Clerks worldwide to be universally accepted as members of their management teams in their municipalities. I share her position.

Recognizing that many of our members have difficulty being away from their offices to attend educational sessions needed to accumulate CMC and MMC points, it was recommended during Education Summit I, which was held in 2000, that IIMC develop a Distance Education curriculum and the requirements were subsequently changed to permit Distance Education points. Regretfully, that recommendation was not acted upon until this year. Thanks to IIMC's Director of Education Dr. Ray Garubo, IIMC's first Distance Education Program was launched in April.

As I write this report, the verdict is not in on the constitutional changes required to implement the recommendations from the Membership Review Task Force. The vote will be taken during the Annual Business Meeting in Whistler. Many of us believe these changes are critical to the continued growth of IIMC's membership base and are hoping for a positive result. I am confident the membership will see the value of these changes and approve them. (*Editor's Note:* At the



# PRESIDENT'S MESSAGE



Annual Business Meeting in May, Delegates voted to pass the Membership Review Task Force's recommendations.)

## IIMC OUTREACH

I believe IIMC's outreach program is the most important aspect of membership development. Depending on which day the count is taken; IIMC has a membership base of 10,250 plus or minus members. Only about one-tenth of those members have the opportunity to attend and take advantage of the vast array of educational programs offered at the IIMC Annual Conference. For that reason, visits from the Executive Committee and staff are the chosen method of providing the remainder of IIMC's membership an up close and personal glimpse of IIMC. Absent the travel and outreach, many of our members would never get first-hand information on the benefits of IIMC membership or personally meet its leaders. Travel funds are budgeted annually for the Executive Committee and staff to visit members in State, Provincial and National Associations and Institutes.

This year it has been my great pleasure to visit the following Associations: AMCTO (Ontario, Canada), Florida, Indiana, Michigan, North Carolina, Oregon, the VGS (Netherlands), ATAM (Portugal), ACSes (England), New Jersey, Alaska, SOLAR (Scotland), Georgia, Ohio, California and IMASA (South Africa).

I have also visited with members in the following regions: Region IV (Oklahoma City, Oklahoma), Region II (Baltimore, Maryland) and Region III (Myrtle Beach, South Carolina).

What an honor it was for me to have the great privilege of attending the inaugural session of the newly organized New York Institute at Cornell University, the Institute that replaced IIMC's first Certification Institute at Syracuse University, NY. I was invited to be the keynote speaker at the 20th Anniversary celebration of the New Mexico Institute; and, I attended the Arizona Institute in Phoenix, and the New England Institute at Salve Regina in Newport, Rhode Island.

It was a great joy to renew acquaintances from the past and to visit with some of IIMC's most valuable resources at the first organized meeting of retired clerks

held in January in St. Petersburg, Florida. There is much potential among our retired Clerks. I believe we can tap these resources in the future. I found those who attended to have the same enthusiasm and interest in IIMC as when they were active members. I am confident this group will grow when the word gets out as to how enjoyable it can be to get together without concern for what is going on back at the office.

Executive Committee members and staff also made a number of visits on IIMC's behalf. Among these were Region I, France, New England, Virginia, Utah, Minnesota, Indiana, Connecticut and California.

## TEXAS MUNICIPAL LEAGUE

One of the significant events of my year came when I was invited to speak during a luncheon of the Texas Municipal League. Coincidentally, IIMC's mid-year Board Meeting and TML's Annual Conference were held the same week in San Antonio, Texas. Thanks to the tenacity and persuasiveness of IIMC and IIMC Region IV Director, Mary Lynne Stratta, MMC, Bryan, Texas, I received an unprecedented invitation to speak to the TML membership. I was told that this was the first time a Municipal Clerk had ever addressed TML. I was nervous when I was told how important it was to make a good impression. TML delegates were courteous and attentive and I was well received. What an opportunity for IIMC and what a personal honor for me!

## GLOBAL CERTIFICATION INSTITUTES

The Certification Institutes in the various states and provinces are critical to Municipal Clerks as they seek the required CMC and MMC education points. IIMC currently has 44 outstanding Certification Institutes in the United States and Canada but, until recently, there were none outside of North America. Efforts were made for a number of years to establish such Institutes but without success. But, as Paul Harvey would say, "*Stay tuned for the rest of the story.*"

I am happy to report that the first non-North American Certification Institute will open in Bulgaria this Fall. When Past President, Pierre Pagé, CMC, Ottawa, Ontario, Canada, and I traveled to Bulgaria in

February at the invitation of Professor Bojana Nedeltcheva, General Director of the Institute for Postgraduate Studies of the University of National and World Economy in Sofia, Bulgaria, she told us that it had been her dream since she first visited IIMC over eight years ago to establish an IIMC-approved Institute in Bulgaria. As Past President Pagé and I participated in a seminar she had planned during our visit and visited with the leaders of both the UNWE and Professor Nedeltcheva's Institute of Post Graduate Studies, we quickly became aware that she had in place all the elements of a successful Institute. It appeared to us all that remained was to reduce the proposal to writing and present it to the IIMC Program Review and Certification Committee for evaluation. Dr. Garubo was dispatched to Bulgaria to meet with professor Nedeltcheva to assist with writing the proposal. To make a long and happy story shorter, the Bulgarian Institute, to be formally known as the Central and East European Certification Institute at the Institute for Education of Municipal Clerks, Sofia, Bulgaria has been approved as the first non-North American IIMC Certification Institute.

I must add that in preparing the proposal for the Institute, it became apparent that Professor Nedeltcheva met the requirements for a CMC designation. Dr. Garubo assisted her with her application and she was presented with an Honorary CMC during the Whistler Conference. What an honor it is to make the announcement of this new Institute and to award the CMC to Professor Nedeltcheva. I must, however, give credit where credit is due. The opportunity to announce this Institute is the culmination of groundwork of many of my predecessors. Congratulations to Professor Nedeltcheva and all who have worked with her over the years to make this happy announcement possible.

It appears that the announcement of another non-North America partnership is forthcoming. With assistance from IIMC Region XI Director, Mike Kendall, West Sussex, England, a relationship has been established with the Society of Local Council Clerks, an English organization that shares similar goals and objectives with IIMC. Plans are to formalize this partnership this Fall.

In addition, plans are underway to enter into an agreement with IFES, an international organization whose mission is to foster good governance in emerging democracies. First Vice President Elizabeth Kiss, MMC, East Brunswick, New Jersey and I met with IFES officials in October and came away excited about the possibility of a partnership that would involve our experienced members in assisting IFES attain its mission. The terms of our relationship have not been finalized as of this writing. The organization made a presentation to the IIMC Board at the Whistler Conference regarding how the relationship should be structured for the benefit of both organizations. Developments will be shared with the membership as they unfold.

Congratulations to all who have been involved in these three efforts.

### **IIMC STAFF**

IIMC is fortunate to have an outstanding staff, dedicated to the Organization. The quality of their work helps IIMC put its best foot forward at all times.

Since the 2003 Conference, there have been some staff changes that are bittersweet. We have said farewell to two old friends: Dr. Frank Adshead, Director of Education; and Sheri Burdick, Certification Specialist. They both retired this past year. In addition, Dr. Maurice Bisheff, Resource Center Director and Ani Kevorkian, Executive Secretary, made career changes that took them away from IIMC. Although it was difficult to bid farewell, the changes presented some opportunities for reorganization and the Executive Director has made the most of these opportunities.

Dr. Ray Garubo, longtime friend of IIMC, joined the staff as Director of Education and has already made enormous contributions in education and research. He is a valuable staff addition. Toni Brandt, Accreditation Specialist took over Sheri's responsibilities and is doing a great job.

The position of Director of Membership Services was created and Janis Daudt was promoted to this much needed position. Member Services Representative Linda Apodaca, a position that was added to make this area more effective, ably assists her.



## PRESIDENT'S MESSAGE



With excellent direction from Executive Director Joe Tiernay, the entire staff is doing a marvelous job. We are fortunate to have each one. Their individual areas of expertise blend into an effective professional Organization.

### CONCLUSION

I will conclude my report as it began by telling you once again how humbled I have been to serve as President of the premier professional Organization in existence today. It is truly amazing to witness the dedication and commitment of the members who serve on the Board, on committees and task forces and those who also serve their State and Provincial Associations with the same dedication and commitment. The members are our most valuable assets. They individually and collectively make IIMC successful. Our members are true professionals. I am proud to be associated with each and every one.

I want to express my sincere appreciation and gratitude to the Executive Committee Members, Vice Presidents Elizabeth Kiss, MMC and Susan Morrow, MMC, Plainfield Charter Township, Belmont, Michigan and Past President Pagé, who have been the "greatest" to work with this year. They are true friends whose friendships I shall treasure forever. What a great Board of Directors I have had to work with, too. They have been cooperative and rendered exemplary service to IIMC throughout their terms. I am happy to be able to count these talented and dedicated individuals among my friends. These are friendships that are dear to me.

I also must thank all the Committee Chairs and Co-Chairs and the members that made up each committee. These committees enormously extend the work that IIMC is able to accomplish in one year. We are fortunate to have effective committees made up of talented and dedicated individuals. Thanks to each who has served this past year. Your work is commendable.

It has been a joy to work with the staff this year. I am appreciative of all the kindness they have afforded me and for making my job as President a pleasure.

Thank you Joe and staff for making this a great year and for your friendship.

I appreciate the warm hospitality the Executive Committee, staff and I have received as we have visited with you this year. The Municipal Clerk's world may be changing, but the individuals that serve in the Municipal Clerk's positions worldwide never change. I've said it a thousand times, and I'll say it again with renewed enthusiasm, *"Municipal Clerks Are Simply The Best, Better Than All the Rest."*

As I sign off, I would like to leave you with some words that have meant much to me over the years. As you go about living your life, I hope you will always:

*"Sing as if no one is listening; and dance as if no one is watching."*

I challenge you to have a great life whether you are working, spending time with your family or just "goofing off" — something Clerks don't do very much.

Thank you for the support you have given me this year and for your friendship ... and thank you for all you do for IIMC.

## EXECUTIVE DIRECTOR'S MESSAGE



It was a busy year for IIMC with many changes and exciting new opportunities. Our 2003 57th IIMC Annual Conference in Columbus, Ohio was a great success with 878 Delegates and guests enjoying a wide variety of education sessions, great general speakers and fun and exciting networking opportunities. Special thanks once again to Host Clerk, Angie Blevins, CMC, and her great team for helping to put on an excellent conference.

### STAFF CHANGES

There were significant staff changes at HQ this year with some long-time employees retiring and others moving on to new ventures. Dr. Frank Adshead, Director of Education (13 years of service), and Sheri Burdick, Accreditation Specialist (22 years), both retired this past year. Dr. Maurice Bisheff, Resource Director (eight years), got married and relocated to Santa Barbara, CA, and Ani Kevorkian, Executive Secretary/Office Manager (six years), resigned to pursue a different career path. Jim Stombock, Development Director (five years), also left IIMC. With all these retirements and resignations, the 2003-04 year was a bit of a challenge; however, the IIMC staff rose to the occasion and our service to the membership did not suffer.

The staff turnover also gave us an extensive opportunity to reassess our staffing needs and skill sets and to implement some changes that will better serve the Association. We were pleased to hire Dr. Raymond Garubo, who had just recently retired from his professorship at La Verne University, California as Director of Education. He also has taken on the additional duties of Research for the Organization. Dr. Garubo has been a long-time associate of IIMC and with his knowledge of the Organization was able to hit the ground running. Please read Dr. Garubo's column in this Annual Report to hear about all the exciting new things we are doing with education.

We were also able to strengthen our Member Services Department by adding a new employee. Linda Apodaca, Member Services Representative, was hired to work with Janis Daudt to ensure that IIMC members receive top customer service and to help our Membership Committee retain existing members and enroll new ones. Denice Cox was promoted to Office Manager; Toni Brandt became full time Accreditation Specialist; and Beverly Hencel was hired as the new receptionist. To shore up our IT support, Scott Sloan was hired as a contract employee to provide us with two days a week of on-site computer support. As IIMC makes more use of e-mail and on-line services, it became imperative that its computer system be reliable. Scott has improved our overall functionality, assisted staff in the more efficient use of our existing software and reduced the incidents of e-mail and web-site problems.

### IIMC's FIRST NON-NORTH AMERICAN INSTITUTE

One of the most exciting things to happen this year was the establishment of the Central and Eastern European Institute. After years of trying to make inroads in Europe and Africa, IIMC and Professor Bojana Nedeltcheva of the University of National & World Economy teamed up to launch our new Institute in Sophia, Bulgaria. This is a major step forward for IIMC and strongly affirms that it is an international Organization. The Central & Eastern European Institute has drawn the attention of other national associations and could possibly lead to more IIMC Institutes originating in other countries.

### MEMBER SERVICES

IIMC continues to look for new and innovative ways to increase the value of its membership. To that end we negotiated a promotional deal with **Lapelpinz.com** to produce and mail an IIMC Membership pin to all 10,200 members. This pin cost IIMC nothing in the way of actual dollars. We believe it is something our members will wear with pride. If you did not receive your pin, please contact HQ to obtain one.

We also entered into an agreement with **Liberty**



# EXECUTIVE DIRECTOR'S MESSAGE



**Mutual Insurance** for discounted Home and Auto insurance for our U.S. members. All IIMC members should have, or will receive a mailing outlining the program. The program is pretty straightforward and offers discounted auto and home insurance to

IIMC members, which in some cases can save you \$300 - \$500 per year. I encourage you to call Liberty Mutual and obtain a no-obligation quote. We are also working with Liberty Mutual's subsidiary company in Canada to offer the same promotion to our Region X members.

Finally, **American Legal** and IIMC have signed a deal whereby IIMC is promoting the new *Robert's Rules of Order* on CD. If you use Robert's Rules for your procedural issues, then this disk is a must have. Folio searchable, the CD installs on your computer and puts the entire Robert's Rules book at your fingertips and makes searching procedural questions fast and easy.

These new services coupled with our existing On-line Boutique, **MBNA Credit Card**, Discounted Airline Tickets and Car Rentals make your IIMC membership even more valuable.

## **WWW.IIMC.COM**

As we move toward a totally wired world, IIMC is keeping pace by constantly updating its web site to provide more services on-line. You can currently download membership application forms and forms for certification and recertification. Through the assistance of **LaserFiche Document Imaging**, we will be offering access to various documents in our Archive Section using the LaserFiche Web-link software. Look for a total redesign of the IIMC web site later this year.

## **NEWS DIGEST**

The *News Digest* continues to grow in content and aesthetics and is a reliable source of education and information for members. This year, the *News Digest* carried extensive articles about IIMC; CMC recertification; The Futures Group Report; and new Membership Classifications. You can expect to see more articles in the future on leadership, management, personnel and technical training, all specifically geared to the Municipal Clerk experience.

## **MEMBERSHIP**

IIMC membership held steady this year with approximately 10,200 members. Staff launched the IIMC 500 membership drive that allows existing members a discount on their registration for signing up a new member. To date we have signed up 27 new members under that program.

## **FINANCIALS**

IIMC ended the 2003 calendar year with a small increase in its net cash position of \$608. Corporate sponsorship remains strong with more than \$100,000 in revenue. We have approximately \$250,000 in cash reserves, and we continue to monitor revenues and expenditures to ensure IIMC's continued financial health.

## **OUTREACH**

Continuing in our efforts to reach out to members, the President, or a member of the Board or staff attended State, Provincial and National Association meetings in AK, AZ, CA, CO, CT, FL, GA, ID, IN, MI, NC, NJ, NY, OH, OR, UT, VA, WA, WI, AB, ON and Region I, II, III, and IV meetings. We also attended the annual conferences in The Netherlands, Portugal, France, Great Britain, Scotland, Mexico, South Africa and the EU. IIMC was an exhibitor at the National League of Cities and the International City Managers Association.

## **ON THE HORIZON**

IIMC will continue to develop new and exciting programs for its members. We are working on a one-day education and tradeshow program that will be offered to members free of charge. This will provide educational opportunities and exposure to potential products and services to IIMC members who cannot attend the Annual Conference. We hope to make this idea a reality this Fall. IIMC's web site will be redesigned to be more interactive and user friendly. IIMC is working to provide more publications on key topics to the membership.

In closing I want to thank the Board of Directors and Staff for their on-going support, and I look forward to serving IIMC and its members in the future.



## INTRODUCTION

Since August 26, 2003, there have been some exciting and challenging projects undertaken by the Education Department. This annual report to the membership is a synopsis of them. It is intended to publicize the work carried out by a team: Toni Brandt, Accreditation Specialist; Jennifer Ward, Education Associate; Tammy Schultz, Recertification Clerk; and the rest of the world headquarters personnel. I am proud to work with these professionals and our Executive Director, Joe Tiernay.

As a part of my first year orientation, I have attended and presented workshops at the following Conferences: Alberta Municipal Clerks Association; Louisiana Municipal Clerks Association; and the Wyoming Association of Municipal Clerks and Treasurers; the week-long Institutes of Arizona and Northwest Clerks in Washington, and by the time of this publication, the Iowa Institute. And, the Conference in Whistler was my first as the new Director of Education and Research.

IIMC is a professional Association led by professional Municipal Clerks. It is the Committees and Board who direct the Association's overall strategic plan. I am guided by their vision and leadership.

## CERTIFICATION

The Certified Municipal Clerk (CMC) and the Master Municipal Clerk (MMC) designations continue to be sought by our members. 4,518 of our active members are CMC's; 1,844 are enrolled in the Master Municipal Clerk Academy: 953 are in Level I, 558 are in Level II, and 320 have attained their MMC. Certification seems to be gaining in status and popularity among our municipalities. We now have 44 Certification Institutes in North America and in October will have our first overseas Institute serving 13 countries of Central and Eastern Europe from Sofia, Bulgaria.

## RECERTIFICATION

Most professions require their members to keep up their skills by continuing their formal training. We have learned that attorneys, certified public accountants, tax preparers, and a host of other professions belong to

associations that require their members to demonstrate they have kept current in their field.

Every four years our CMC's must earn 40 hours of Municipal Clerk related training of their choosing. These hours can be earned in various ways, including taking IIMC distance education courses. The Board of Directors dropped the requirement of 10 hours per year so that our members could make more manageable choices of what workshops to take from their State, Provincial and National Associations and other training providers.

## IIMC INSTITUTES

The IIMC-recognized Municipal Clerks Institutes which offer 100 hours of training for the CMC designation and the Master Municipal Clerk Academies continue their effort to offer our members high quality training in times of severe fiscal constraints. The Provincial and State Associations work hard to emphasize the value of these Institutes to their affiliate colleges and universities. Institute Directors stay in touch with each other through an Internet list serve that provides a continuous dialogue and sharing of ideas of program management. I have been graciously added to this channel, and I keep them apprised of programs and challenges the association is meeting.

The "testing" requirement (we now use the more accurate term "assessment") is being fulfilled in rigorous and creative ways, from writing case studies, final papers, objective and subjective tests at the conclusion of each course, and the Knowledge Transfer Action Plan (KTAP).

## DISTANCE EDUCATION

The pilot program completed in the spring revealed that IIMC Clerks are busy professionals but can handle the extra opportunity of learning on line. We have launched several courses that are "scheduled" (specific beginning and ending time to assignments and course completion) and "self paced" (completing readings and assignments as one's schedule permits). The Association is moving toward being a provider *and* certifier of training. Both the Education and Personal Growth and Program Review and Certification Committees assist



# EDUCATION DIRECTOR'S REPORT



with this program. Current training modules emphasize leadership, management and law.

## CONFERENCE OUTREACH

Research revealed that only about 10 percent of IIMC members can afford the time and money to attend our Annual Conferences, thus the remainder are losing a valuable opportunity for personal and professional growth. For the first time, an IIMC "mini-conference" CD-ROM is available to those who cannot attend annual conferences. Two Education sessions and one General Session, along with assignments and readings, provide training, CMC recertification hours, CMC Experience points, and MMCA Advanced Education points. These sessions were recorded during the Conference in Whistler, B.C., this past May.

## GRANT DEVELOPMENT

With the help of the consulting firm Forward Progress, IIMC wrote and submitted four foundation grant proposals. To date, three were rejected and the remainder is still under consideration. We continue to look for outside revenue sources to provide service and programs to members.

## SELF ASSESSMENT

We are designing a Municipal Clerk Self-Assessment program that will accurately measure a Municipal Clerk's personal and professional effectiveness. Using the "360 degree" concept, participants will complete their own inventory, select superordinates, peers, and subordinates also complete one, and after analysis at IIMC, receive some important feedback to use for planning and completing a professional growth plan. Off the shelf inventories have been rejected. Since the Municipal Clerk is a unique profession, it must have its own measurement of quality. Look for a prototype to be tested by the end of the year.

## RESEARCH

In cooperation with 27 State/Provincial Associations, a study was conducted this past year about important issues to Clerk education and the Municipal Clerk profession. We compared the responses of IIMC

members to non-members and reported to the Board of Directors important findings that might affect IIMC policy and improve our programs.

## ASSISTANCE TO COMMITTEES

We continue to assist the Committees in their efforts to achieve the annual goals they have set for the Association. Teleconferences and E-mail distribution link us worldwide to the important refinements to Clerk education and service that the Committees pursue.

## LOOKING TO THE FUTURE

The Education Department closely monitors the evolving role of the Municipal Clerks. IIMC's pursuit of professionalism in local government through education is still our goal. While serving our experienced members, we are reaching out to the next generation of newer Municipal Clerks by assessing their needs as well. The Deputy Clerk Academy (piloted at the Whistler Conference) will be a regular offering at our Annual Conferences. Distance education will be expanded where the need for specific training is not readily available to our members.

Linking our members to Municipal Clerks worldwide is exciting. North America, the United Kingdom, and Europe are connected through joint ventures in Clerk education. We are joining forces with other organizations and associations to pursue joint training objectives that will enhance the image and reputation of IIMC. Some of these include IFES, based in Washington D.C., and the United Kingdom's Society of Local Council Clerks (SLCC) in London.

Please work with your State, Provincial and National Associations and IIMC Region Directors in bringing to our attention any programs or issues we should be addressing. Check the IIMC website from time to time for important updates on Association development and Municipal Clerk education.

# AUDITOR'S REPORT

## About Our Financials



Board of Directors  
International Institute of Municipal Clerks

We have audited the accompanying statement of financial position of the International Institute of Municipal Clerks ("Institute") as of December 31, 2003, and the related statement of activities and cash flows for the year ended. These financial statements are the responsibility of the Institute's management. Our responsibility is to express an opinion on these financial statements based on our audit.

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatements. An audit also includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the International Institute of Municipal Clerks as of December 31, 2003, and the results of its operations and cash flows for the year then ended in conformity with accounting principles generally accepted in the United States of America.

Our audit was made for the purpose of forming an opinion on the financial statements of the International Institute of Municipal Clerks taken as a whole. The accompanying schedule of net assets is presented for purposes of additional analysis and is not a required part of the financial statements. The information in the schedule has been subjected to the auditing procedures applied in the audit of the financial statements and, in our opinion, is fairly stated in all material respects in relation to the financial statements taken as a whole.

Smith Marion & Co.  
February 12, 2004



# STATEMENT OF FINANCIAL POSITION

December 31, 2003



## ASSETS

### Current Assets

Cash	\$ 129,875
Certificates of deposit	100,539
<b>Subtotal cash and cash equivalents</b>	<u>230,414</u>

Accounts receivable less allowance for doubtful accounts of \$-0-	3,272
Inventory	25,959
Prepaid expenses	16,101
Conference prepaids	30,052
<b>Total Current Assets</b>	<u>305,798</u>

### Other Assets

Property and equipment, less accumulated depreciation	1,239,710
Capitalized cost, less accumulated amortization	4,087
<b>Total Other Assets</b>	<u>1,243,797</u>

**TOTAL ASSETS** \$1,549,595

## LIABILITIES AND NET ASSETS

### Current Liabilities

Accounts payable	\$ 25,686
Accrued liabilities	17,595
Other payables	7,021
Deferred revenue-conference	63,964
Mortgage note payable - current portion	24,931
<b>Total Current Liabilities</b>	<u>139,197</u>

Mortgage note payable	969,807
<b>Total Liabilities</b>	<u>1,109,004</u>

### Net Assets

Unrestricted net assets	440,591
<b>Total Net Assets</b>	<u>440,591</u>

**TOTAL LIABILITIES AND NET ASSETS** \$1,549,595

# STATEMENT OF ACTIVITIES

December 31, 2003

## REVENUE

Membership dues	\$ 889,093
Conference	514,866
Education	155,753
Marketing development and promotion	93,940
Building	10,304
Administration	40,502
Interest	4,355

## TOTAL REVENUE

1,708,813

## EXPENSE

### Program Services

Education	182,799
Conference	554,459
Membership services	243,271
MCEF	72,280
Marketing development and promotion	95,363

### Total Program Services

1,148,172

### Supporting Services

Administration	590,109
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### Total Support Services

590,109

## TOTAL EXPENSE

1,738,281

## Change in Net Assets

(29,468)

## Beginning Net Assets

470,059

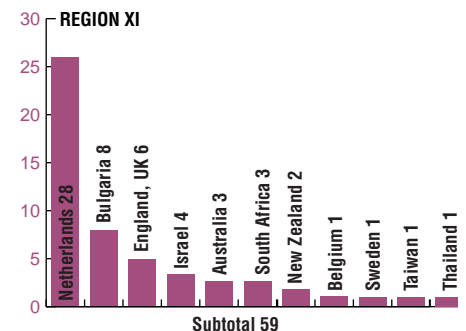
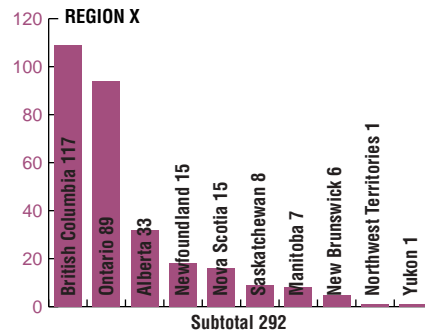
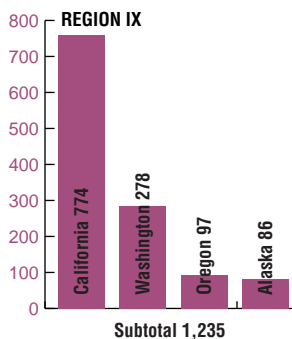
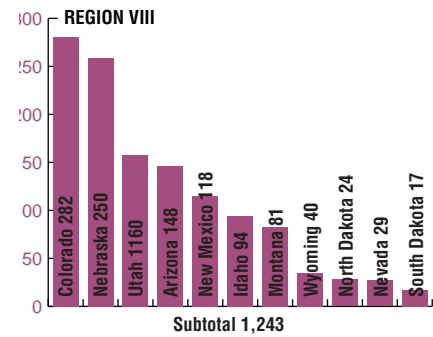
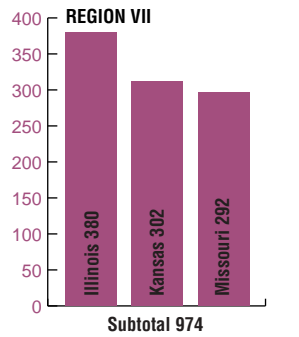
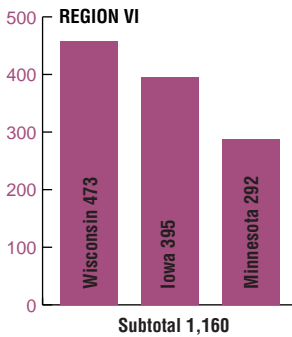
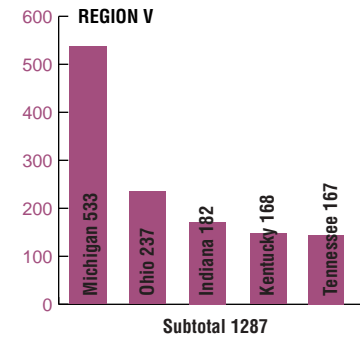
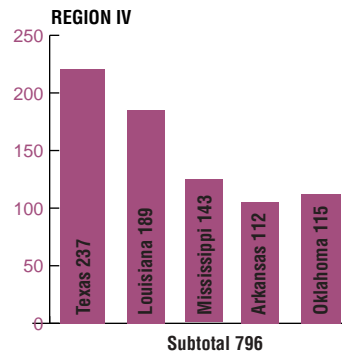
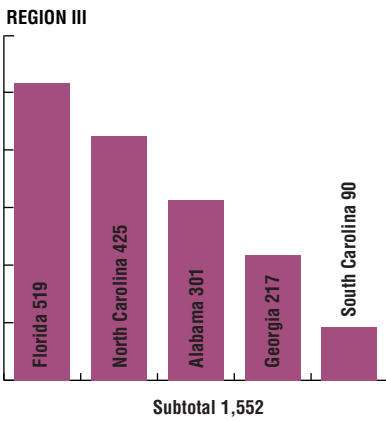
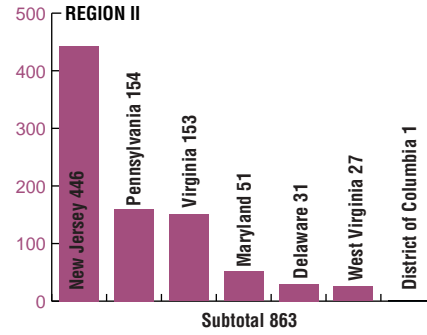
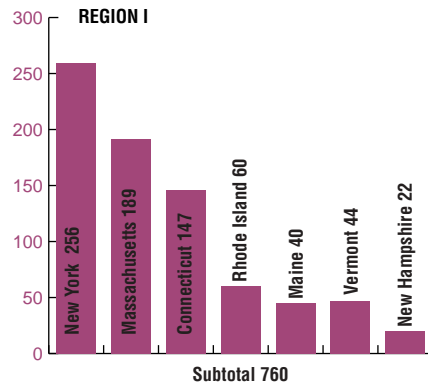
## Ending Net Assets

440,591



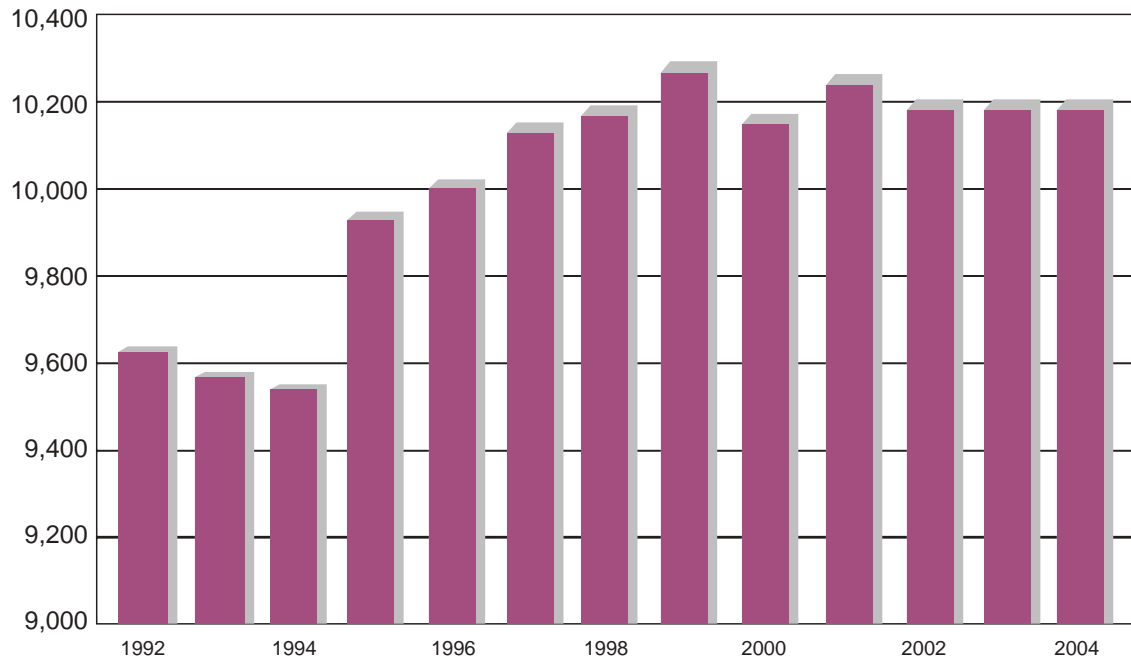
# IIMC STATE/REGIONAL/NATIONAL MEMBERSHIP

The following chart represents IIMC membership in each state, province and country. As of May 31, 2004, California leads all states in membership with 774. Region III (AL, FL, GA, NC and SC) leads all Regions in total membership with 1,552. British Columbia leads all members in Canada with 117. The Netherlands has 28 members to lead all countries in Region XI.

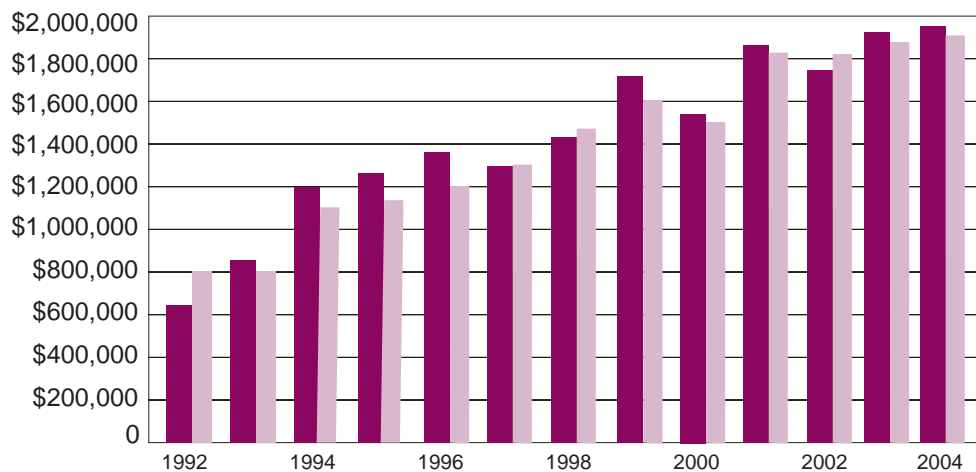


# MEMBERSHIP & ANNUAL REVENUE CHARTS

## Membership



## Annual Revenue & Expenditures








## CMC AND MMCA FIGURES

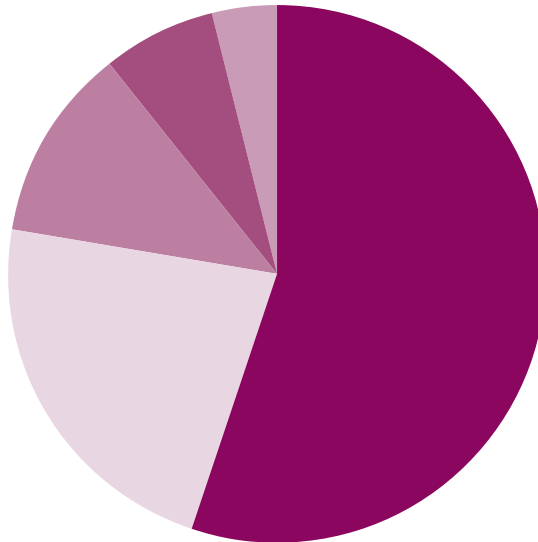
Certification and Master Municipal Clerk Academy Figures

The Certified Municipal Clerk program began in 1971.








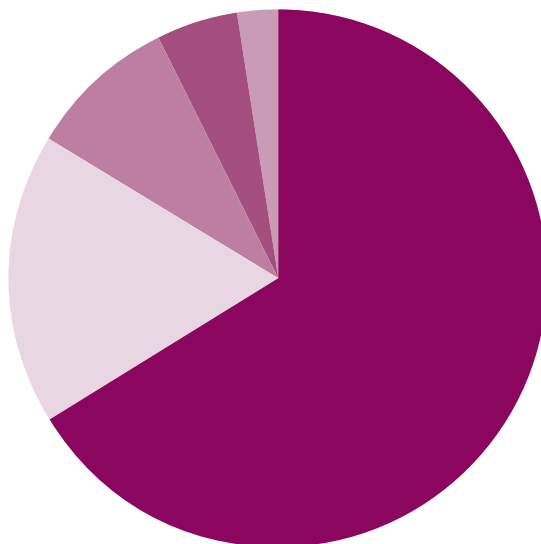
### TOTAL ACTIVE CLERKS AS OF MAY 31, 2004

CMC - 4,518	
MMCA - 1,844	
Level 1 - 953	
Level 2 - 558	
MMC - 320	



### TOTAL CLERKS SINCE INCEPTION OF PROGRAMS

CMC - 9,615	
MMCA - 2,542	
Level 1 - 1,300	
Level 2 - 711	
MMC - 358	





# IIMC INSTITUTES



*IIMC recognized Municipal Clerks Institutes continue their effort to offer members high-quality training in times of severe fiscal constraints.*



*Currently, there are 44 College and University based Institutes throughout the United States and Canada.*



# BOARD OF DIRECTORS



PRESIDENT

**Jean M. Bailey, CMC**  
City Clerk  
Rocky Mount, NC



FIRST VICE PRESIDENT

**Elizabeth H. Kiss, MMC**  
Municipal Clerk  
East Brunswick Township, NJ



SECOND VICE PRESIDENT

**Susan L. Morrow, MMC**  
Township Clerk  
Plainfield Charter Township  
Belmont, MI



IMMEDIATE PAST PRESIDENT

**Pierre Pagé, CMC**  
Director of Secretariat  
Services/City Clerk  
Ottawa, Ontario, Canada

## 2004 EXPIRATION

**Denise L. MacAloney, MMC**  
Town Clerk  
Westminster, MA  
Region I

**Linda M. Hess, MMC**  
City Clerk/Treasurer  
Taneytown, MD  
Region II

**Sandra Woodall, MMC**  
City Clerk  
Dunedin, FL  
Region III

**Sharon K. Cassler, MMC**  
Clerk of Council  
Cambridge, OH  
Region V

**Bonnie Moritz, MMC**  
City Recorder  
Cedar City Corporation, UT  
Region VIII

**Barbara Price, CMC**  
City Clerk  
Puyallup, WA  
Region IX

**Mike Kendall**  
Director of Corporate  
Services/County Secretary  
West Sussex, UK  
Region XI

## 2005 EXPIRATION

**Patricia F. Hullfish, CMC**  
Municipal Clerk  
Plainsboro, NJ  
Region II

**Frances Kersey, CMC**  
City Clerk  
Oklahoma City, OK  
Region IV

**Susan L. Lambert, CMC**  
City Clerk  
Harlan, IA  
Region VI

**Charles E. Tokar, MMC**  
Village Clerk/Collector  
Village of Chicago Ridge, IL  
Region VII

**Courtney V. Bohlender, CMC**  
Town Clerk  
Saratoga, WY  
Region VIII

**Robert M. Prentice, CMC**  
Director of Corporate Services  
Newmarket, Ontario, Canada  
Region X

## 2006 EXPIRATION

**Patricia A. McCoy, CMC**  
Town Clerk/Treasurer  
Poultney, VT  
Region I

**Dyanne Reese, CMC**  
Clerk of Council  
Savannah, GA  
Region III

**Mary Lynne Stratta, MMC**  
City Secretary  
Bryan, TX  
Region IV

**Patricia Burch, MMC**  
City Clerk/Treasurer  
Whitesville, KY  
Region V

**Sandi Behrens, MMC**  
City Clerk  
Albert Lea, MN  
Region VI

**Phyllis J. Walton, MMC**  
City Clerk  
Atchison, KS  
Region VII

**Gail Waibel, CMC**  
City Recorder  
Hillsboro, OR  
Region IX

**Coral Callioux, CMC**  
Director of Corporate Services/City  
Clerk  
Leduc, Alberta, Canada  
Region X

**Ronny Frederickx**  
City Secretary  
Essen, Belgium  
Region XI





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[www.iimc.com](http://www.iimc.com)