



Annual Report

International Institute of Municipal Clerks



2020

MISSION

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

WHO WE ARE

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

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



Lana McPherson, MMC

IIMC President, 2019-2020

Hello, IIMC family!

It is with mixed emotions I write my final report to you as my 'year in review.' An exciting year beginning with the fire alarm sounding just before my President's speech in Birmingham has culminated with the COVID-19 pandemic and canceled the 2020 conference. To state this has been an 'extraordinary' year would definitely cover all the definitions that word embodies. Yet, the most amazing part of my year as your IIMC President has been "YOU"! Yes, YOU are one of the 15,000 remarkable reasons IIMC has flourished in all eleven regions and will celebrate its 75th anniversary in Grand Rapids, Michigan in May 2021. Thank YOU for Being the One to make a difference this past year.

Your IIMC professional Organization is strong financially and will remain stable during this pandemic.

My eventful year began right after our Conference in Birmingham with attending the 2019 Region XI Study Abroad & Symposium, "*Broadening Your Horizons*," commencing in Windsor, UK, then a visit in

London to the Houses of Parliament and concluding in Stratford-Upon-Avon. The Symposium was a roaring success and we are looking forward to the 2022 Study Abroad and Symposium in Amsterdam, The Netherlands. Be sure to note September 2022 on your calendar and "Keep in touch with the Dutch" as plans unfold for another IIMC exceptional educational experience. Special thanks go to IIMC Region XI Consultant Tom van der Hoven and our Region XI associations of ADSO, SLCC, VVG, IMASA, SOLAR, Excelo.net and IAM to name a few. IIMC has welcomed more than 5,000 members in Region XI and continues to broaden these valued international relationships we have established with these esteemed Associations.

The Education Department continues to provide education and training opportunities for our members during this COVID-19 pandemic. During the first-ever IIMC Board of Directors Virtual Meeting via Zoom, your Board voted to temporarily allow Athenian Dialogues to be conducted virtually through January 2021. The Education Department also introduced the 2020 Virtual Institute Collaboration Series with eight of the IIMC-approved Institutes. Past President Stephanie C. Kelly and the IIMC Board formed the Education Task Force in May 2019 and they worked diligently through May 2020. The Membership Department has continued to reach out to new Clerks and welcome them to the IIMC family. During the past year, there have been 420 Certified Municipal Clerk designations and 114 Master Municipal Clerk designations. That's impressive.

The 2020-2023 Strategic Plan was finalized at the mid-year Board meeting in 2019 and was approved by the Board during the May 2020 business meeting. The Board also approved a new policy regarding the Executive Director's contract negotiations. The Policy Committee has been busy and there will be Constitutional Amendments to consider at the business meeting in Grand Rapids in 2021, so be sure to keep apprised by reading the E-Briefings from IIMC. Also, the IIMC mobile app has been updated. If you haven't downloaded the app, please check it out as there is much helpful information for all Clerks. Thank you, Municode, for sponsoring this informative resource tool for Clerks.

Your IIMC professional Organization is strong financially and will remain stable during this pandemic. Through careful negotiations and the working relationship with the St. Louis Host Committee, the hotel and the vendors and sponsors, IIMC will not be unduly impacted financially because of cancelling its 2020



President's Message
Continued from page 3

Conference. Thank you for your understanding and for your commitment in keeping our IIMC family safe and our Organization financially strong.

The IIMC Foundation continues working through this pandemic in raising funds for Clerk scholarships. Realizing the impact on donations from no IIMC conference this year, Municode issued a challenge to IIMC members of matching donations received through July 4, 2020 up to \$10,000. And, American Legal Publishing also stepped up and extended their Hawaii Vacation Fundraiser to July 4, 2020, matching up to \$10,000 of all funds raised. What other Organization has sponsors so generous and willing to help in tough times? Your donations netted the IIMC Foundation more than \$50,000, all of which go toward Clerk education programs and scholarships

Truly, this has been a year for making history in our Organization. As we continue to move forward and past the current world crisis of COVID-19, please remember YOU are one of the vital reasons IIMC functions; YOU are one of 15,000 Clerks who lead and guide your citizenry; and, YOU are the one who will set the pace for the future of our international professional Organization. YOU will ensure our beloved IIMC family continues the legacy of "Clerkdom." Thank you for Being the Ones to light the path that leads to our future as IIMC takes us to places we never thought possible yesterday.

It has been a great honor and privilege to represent each one of you as I put on my red "Dorothy" shoes and traveled to your conferences. There is no place like a Clerks' conference to make you feel welcome, blessed and at home. Thank you from the bottom of my heart for giving me this wonderful opportunity to serve as your IIMC President.

With gratitude, Lana



Some Presidential Memories...



Attending the Region VII Meeting: Region IIMC VII Director, Kerry Rozman, KS; and IIMC Past Region VII Director, Kittie Kopitke, IL.



Dan Meers, inspirational leadership speaker at the Missouri Association Clerks Conference



Attending the Ottawa, KS, city commission meeting and "formally" pinned Amy Finch, MMC, City Clerk in Ottawa, KS, with her MMC pin



September brought a change to your IIMC Board of Directors as Bobby Busch, my fellow Kansan, retired from the City of Neodesha, KS.



Colorado Institute Director Kathie Novak



Captain Gail Harris, the U. S. Navy's first African-American Female Intelligence Officer.



Sculptor Veryl Goodnight.

2020 IIMC Executive Director's Update



Chris Shalby
IIMC Executive Director

In light of 2020 being one of the most extraordinary years in IIMC's history, the Organization has weathered the constant flux by escalating its membership engagement, keeping a watchful eye on its finances and working with a supportive Board and dedicated membership.

My update will feature some of the salient activities that were borne from COVID-19 and how that has helped maintain IIMC's status quo in 2020.

Board of Directors

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

At the midyear meeting in November 2019, the Board finalized their third iteration of their three-year strategic plan, having met nearly 85% of its goals from the first two plans. The initial strategic plan was launched in 2010 and updated in 2014. With the current 2020 environment, IIMC is holding steady with incremental progress on the Plan.

Headquarters

IIMC Headquarters leases three offices to help offset its mortgage. All leases are renewed through 2021. With the recent environment and people working from home, IIMC was uncertain as to what our tenant situation would be moving forward. Therefore, with the Budget Committee and Board's approval, we refinanced headquarters to provide us with flexibility in case we lost tenants. We're happy to report that

beginning November 2020, all income earned from tenants will reduce IIMC's monthly mortgage liability from approximately \$4,800 to a monthly gain estimated to be \$2,190.

Finance

The 2020 year-end budget will mark the fourteenth consecutive year the Organization's Board of Directors has produced a balanced budget. General fiscal responsibility have shaped where IIMC is today regarding its finances. Financial information is provided on page 9.

By December 31, 2020, IIMC will realize \$828,000 in its Board Designated Reserves. IIMC's financial accomplishments are a strong indication of an Organization's collective efforts and willingness to adhere to a set budget, work with a financially conservative outreach policy and a conference selection process, all the while continuing to broaden its horizons and provide members with valuable services.

Membership

IIMC's membership base is approximately 15,000 and growing. The Department concentrated its efforts this year primarily on reaching out to members to ascertain that IIMC is properly communicating with them through the pandemic.

Their efforts helped make the 2020 year-end membership figures exceed the \$1 million mark for the thirteenth consecutive year.

Marketing/Communications

One area of the Strategic Plan that was accomplished this year was the hiring of a Communications Coordinator in March 2020. It's been nearly six years since we have had an individual devoted full-time in this position. The position will grow advertising, develop the web site, market to membership campaigns and



*Executive Director's Update
Continued from page 4*

improve the overall quality of the *News Digest*, E-briefings and other publications.

We continue to explore low or no cost methods of communications via interactive messaging through social media tools and increasing use of the Zoom platform for outreach events.

The *News Digest* has an open rate of approximately 26% when distributed as a stand-alone piece. Industry standards range between 18% to 22%.

The E-Briefings have an average open rate of approximately 26%, with a click rate of 18%, considerable percentages in this area. IIMC's open rates definitely increase, between 30% and 65%, when the message is specific to the members such as Region or Conference news. Links embedded in the E-briefings are opened at an average of 20% of the time. Approximately 79% of the membership views the E-briefings on their PC; and 21% of the Membership views the E-briefings on a mobile device. These numbers depict a membership that is engaged with their Organization and receptive to receiving weekly and monthly communiqués.

Education

With Institutes, Association Conferences and Region Meetings shutting down in-person meetings, the Department quickly immersed itself in the broader aspects of education delivery and immediately launched into a virtual world this year, creating a seminal program titled Virtual Institutes. The program concluded on November 18 with 20 IIMC Institutes, each of which sold out at 100% capacity, with more than 2,000 overall registrations for these online education sessions. Via Zoom, the Department, in conjunction with the Institutes, was able to help deliver education programs to keep IIMC members focused on their professional development and to acquire points toward their CMC and MMC designations.

The 2020 Annual Conference Education Program was shelved and will be revised for the 2021 Annual Conference in Grand Rapids, MI.

Athenian Leadership Society

This program continues to gain popularity and remains a valuable professional development program. In May of this year, the Board approved holding virtual Dialogues to meet the growing demand of these types of

learning formats. As of this date IIMC has more than 60 Facilitators and more than 140 Fellows.

IIMC Institute Update

Education Advisory Group – The Education Advisory Group (EAG) is a voluntary group of Institute Directors which is currently operating with five members. These five members continue to be a strong team and excellent resource for the department.

Online Education Programs

Captus Press -- IIMC has produced eleven non-interactive, on demand webinars available through Captus Press. Not only has the Department helped create these courses, the rebates returned to IIMC help us toward the creation of new online courses and conference education sessions. We are currently working with three to four presenters to generate more online learning opportunities for 2020-2021.

MindEdge Learning – This online learning partnership launched in January 1, 2018 and has been a valuable resource for IIMC members. In April of 2020, MindEdge offered three free innovation & critical thinking sessions to IIMC members resulting in 1,777 sessions completed.

Ed2Go Online Programs – IIMC has been a retail partner of Ed2Go for many years and these sessions continue to be consistently taken advantage of by the IIMC membership.

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

CMC and MMC Applications

Applicants continue to express their satisfaction with the submission process itself and the quick turnaround time which remains at approximately two to three weeks.

CMCs and MMCs – This past year, IIMC awarded 251 CMC designations and 99 MMC designations which



*Executive Director's Update
Continued from page 5*

is a significant increase from years past. Overall totals are as follows: CMC Grand total = 4,725; MMC Grand total = 1,392.

International Certification -- We have not experienced a significant increase in application numbers from Region X or XI. However, we continue to promote continuing professional Development via Region XI Symposiums.

IIMC Foundation

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

CMC/MMC Scholarships

The 2020-2021 CMC/MMC restricted scholarship applications, which provide reimbursement for institute and academy attendance, closed on March 15th. We received 40 scholarship applications.

2020 Conference Grants – We received 71 Conference Grant Applications in 2020, all of which will carry over into the 2021 conference.

2020 Region Grants – We have received seven of eleven Grant Applications to date. We look forward to seeing more regions take advantage of this financial assistance.

2020 Conference – St. Louis, Missouri

On April 9, 2020, the Board of Directors cancelled the Conference in St. Louis due to COVID-19. In light of the cancellation and the loss of revenue, IIMC was fortunate to negotiate out of its contract obligations regarding expenses with the Host Hotel, the Hyatt, saving approximately \$373,000 between attrition and food and beverage penalties, receiving full refunds (where applicable) with the overflow hotel, the all-conference venue (the Arch) and the Arch caterer. We were also able to hold 2020 rates for the 2025 conference, which will be in St. Louis.

IIMC was able to maintain five sponsors: Municode, American Legal, General Code, Prime Gov and Diligent and approximately \$49,075 in revenue. The 2020 conference loss is estimated to be \$38,285, primarily due to the conference planner cost being part of this budget.

National Highlights – Regions X and XI

Membership numbers in Region XI (outside North America) are approximately 5,000 members with the United Kingdom leading the way with 4,800 members. IIMC's third Region XI Symposium took place in June 2019 in England. Plans are already underway for the 2022 Symposium and the Study Abroad Program, both to be held in the Netherlands.

IIMC now has four solid affiliations with our Region X (Canada) associations – AMCTO (Ontario); LGMA (British Columbia); AMCA (Alberta); and PMA (Newfoundland/Labrador).

Our Region XI International Consultant works closely to grow membership, generate regular communication between IIMC, Region XI directors and Region XI members, supplementing and complementing materials provided by IIMC. We produce twice annually a Region XI Update, a newsletter that highlights the associations in that region.

This year, we created virtual meetings that included members from Regions I through XI interacting via Zoom on the topic "The Challenge of Working Remotely." These sessions have been popular and will continue into 2021.

IIMC's efforts in Region XI are coming to fruition, especially in terms of overall membership numbers. We continue to look forward to growing the membership and, more importantly, promoting IIMC education and professional development.

IIMC Personnel

We have nine full time staff and five independent contractors. IIMC's staff operates as a cohesive and professional group. These individuals are self-starters, creative and have the utmost interest in maintaining this Organization's viability and premier status as the only professional global Organization for Municipal Clerks.

That's IIMC in a nutshell, especially in 2020. An Organization trying to play a special role in local government through its dedicated members – Municipal Clerks. IIMC continues to change and evolve as an Organization. We have a staff who truly enjoys working together and is devoted to IIMC's mission and its members. On their behalf, it's an honor and a pleasure serving as your Executive Director.

Committees - Valuable Vehicles That Drive IIMC

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

IIMC regularly performs a sunset review of its existing committee structure and adjusts it based on the Organization's changing governance needs. In the past, the Board removed the Program Review Committee and created the Education Professional Development Committee. Last year, the Board approved combining two separate committees – Membership and Mentoring – into one committee since there is an overlap in duties and responsibilities. At the virtual Board meeting on May 15, the Board approved eliminating the Legislative Committee, acknowledging the good work past members have performed. Ultimately, the Board realized that the Committee's objectives could not be met in a timely matter due to the continuous fluctuations in legislation from each state and province.

IIMC members who volunteer to serve on Committees reap great rewards, realizing their service and commitment are learning and growing experiences. As with every association, volunteers are key to any

association's growth and success. Without volunteers, associations stagnate.

During the course of 2019 and 2020, standing committees and one Task Force worked toward common goals and objectives, providing input on direction and were instrumental in bringing new ideas or programs to fruition. All Committees are required to file mid-year and year-end reports, whether or not they recommend action.

The following Committees submitted reports with NO ACTION REQUIRED:

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

The following Committees submitted year-end reports with ACTION REQUIRED:

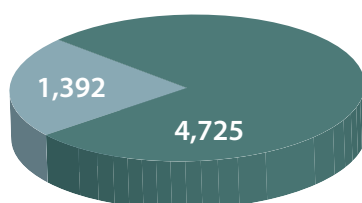
- Budget and Planning
- Policy
- Education Task Force

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

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

Certification and Master Municipal Clerk Academy Figures

The Certified Municipal Clerk program began in 1971.



As of October 2020, there is a total of 4,725 active CMCs and 1,392 MMCs worldwide.

Independent Account's Compilation Report

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

Management is responsible for the accompanying financial statements of the International Institute of Municipal Clerks (A Not-for-Profit Corporation) which comprise the statement of financial position as of December 31, 2019, and the related statement of activities, functional expenses and cash flows for the year then ended, and the related notes to the financial statements in accordance with accounting principles generally accepted in the United States of America. We have performed a compilation engagement in accordance with the Statements of Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the American Institute of Certified Public Accountants. We did not audit or review the financial statements nor were we required to perform any procedures to verify the accuracy or completeness of information provided by management. We do not express an opinion, a conclusion, nor provide any assurance on these financial statements.

Report on Summarized Comparative Information

We have previously audited the International Institute of Municipal Clerks' 2018 financial statements, and we expressed an unmodified audit opinion on those audited financial statements in our report dated May 1, 2019. In our opinion, the summarized comparative information presented herein as of and for the year ended December 31, 2018, is consistent, in all material respects, with the audited financial statements from which it has been derived.

GYL LLP
Ontario, California
September 28, 2020

INTERNATIONAL INSTITUTE OF MUNICIPAL CLERKS

(A Not-for-Profit Corporation)

IIMC FINANCIAL INFORMATION

For the Year Ended December 31, 2019

Statement of Financial Position

ASSETS	2019	2018
Total Current Assets	\$ 2,308,447	\$ 1,942,052
Property and Equipment, net	\$ <u>854,867</u>	\$ <u>877,024</u>
TOTAL ASSETS	\$ <u>3,163,314</u>	\$ <u>2,819,076</u>
Total Current Liabilities	\$ 1,162,699	\$ 1,042,797
Long-Term Liabilities	\$ <u>521,539</u>	\$ <u>552,986</u>
Total Liabilities	\$ <u>1,684,238</u>	\$ <u>1,595,783</u>

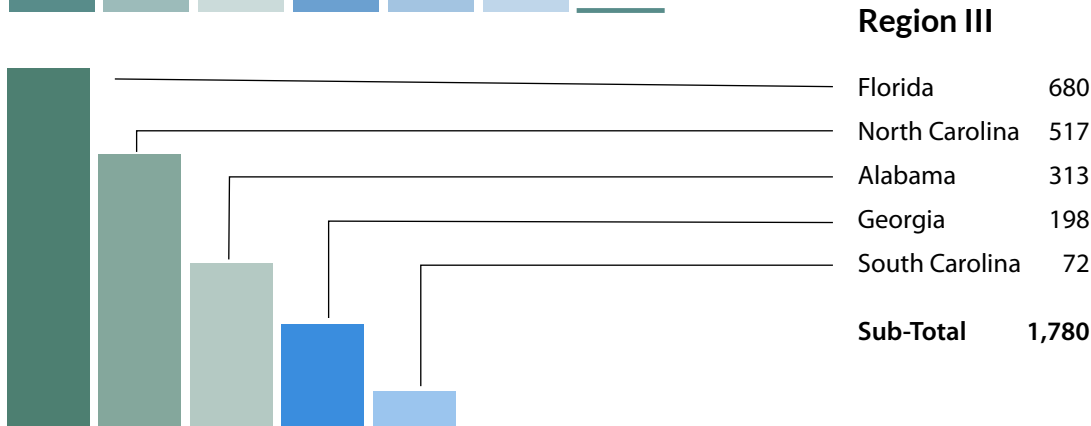
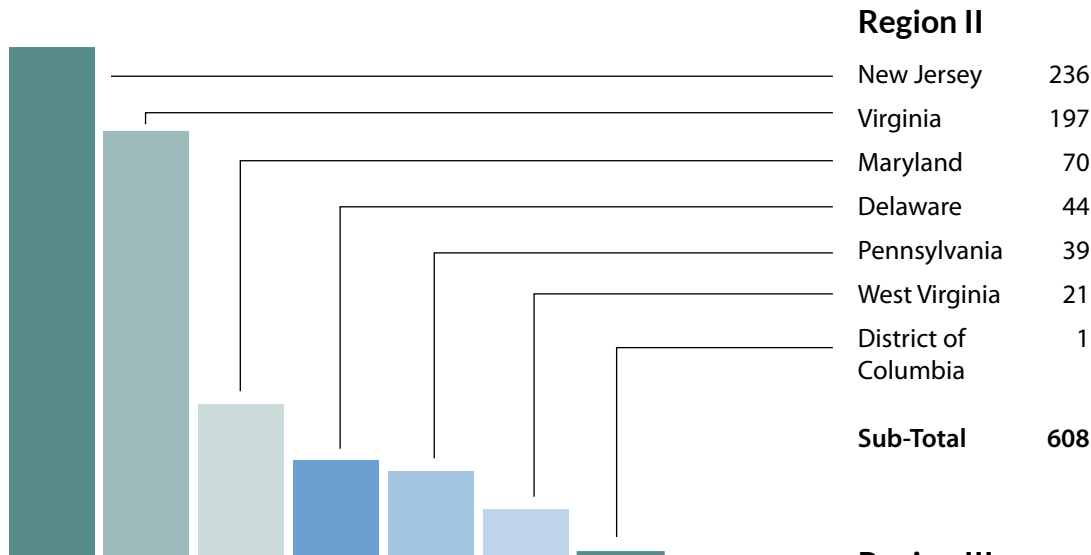
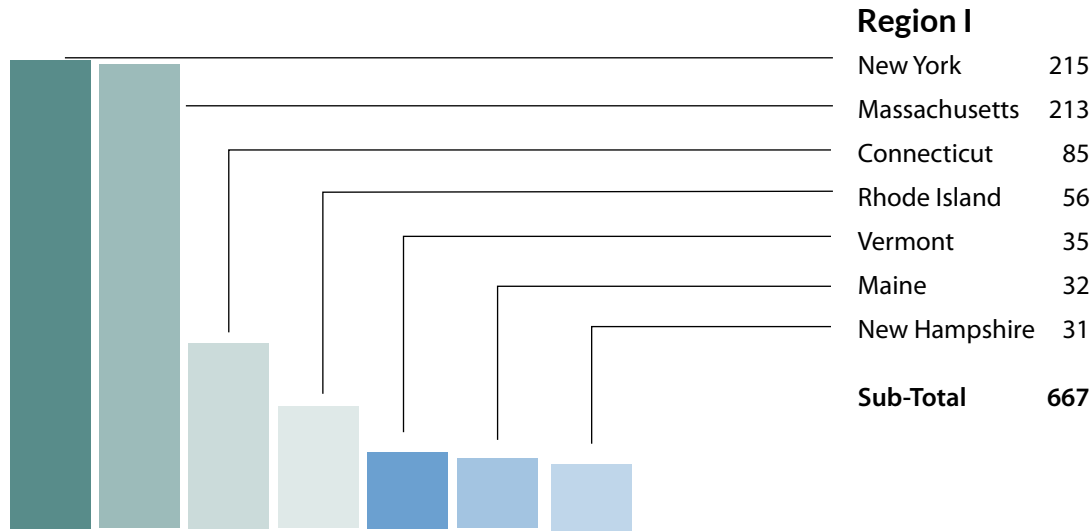
Statement of Activities

REVENUE	2019	2018
Membership Dues	\$ 1,326,793	\$ 1,277,710
Conference	\$ 629,850	\$ 587,242
Education	\$ 229,085	\$ 196,886
Marketing Development and Promotion	\$ 31,851	\$ 29,445
Building Rental	\$ 58,528	\$ 55,189
Misc. Revenue	\$ 1,560	\$
Interest	\$ 18,055	\$ 4,187
Total Revenue	\$ <u>2,295,722</u>	\$ <u>2,150,659</u>
EXPENSES		
Education	\$ 290,851	\$ 241,477
Conference	\$ 534,140	\$ 457,214
Membership Services	\$ 261,296	\$ 217,552
Marketing	\$ 80,608	\$ 77,057
Building	\$ 90,055	\$ 97,931
General and Administration	\$ 782,989	\$ 728,650
Total Expenses	\$ <u>2,039,939</u>	\$ <u>1,819,881</u>
CHANGE IN NET ASSETS	\$ <u>255,783</u>	\$ <u>330,778</u>
Net Assets, beginning of year	\$ 1,223,293	\$ \$829,515
Net Assets, end of year	\$ 1,479,076	\$ 1,223,293

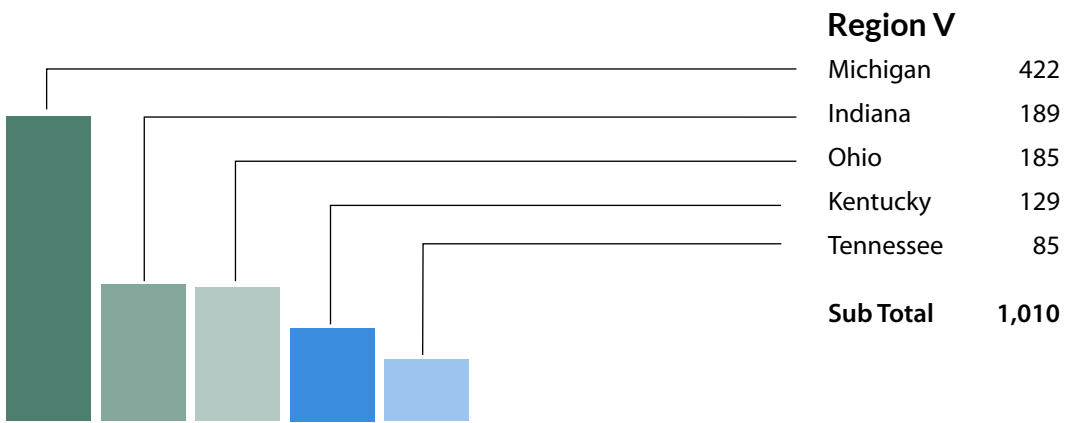
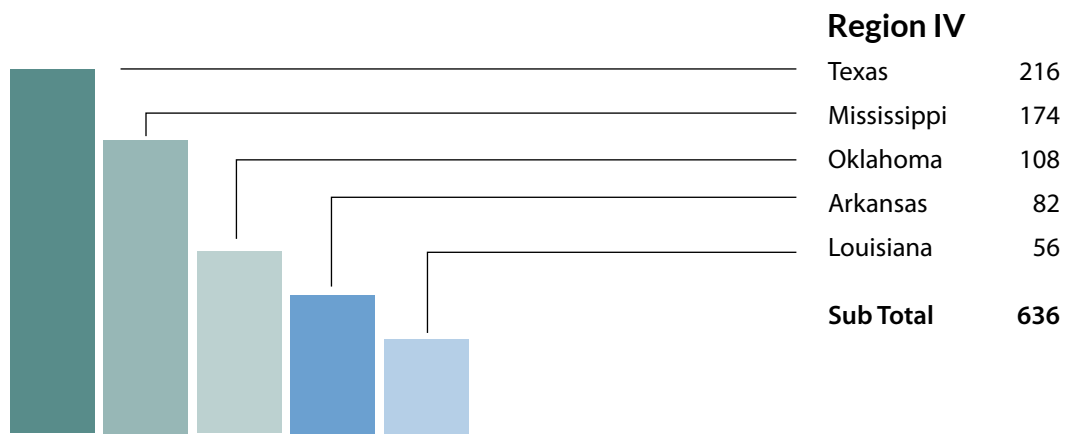
NOTE: The financial statements were audited by GYL LLP and the complete audit report can be located on the IIMC Website.

IIMC State/Regional/National Membership

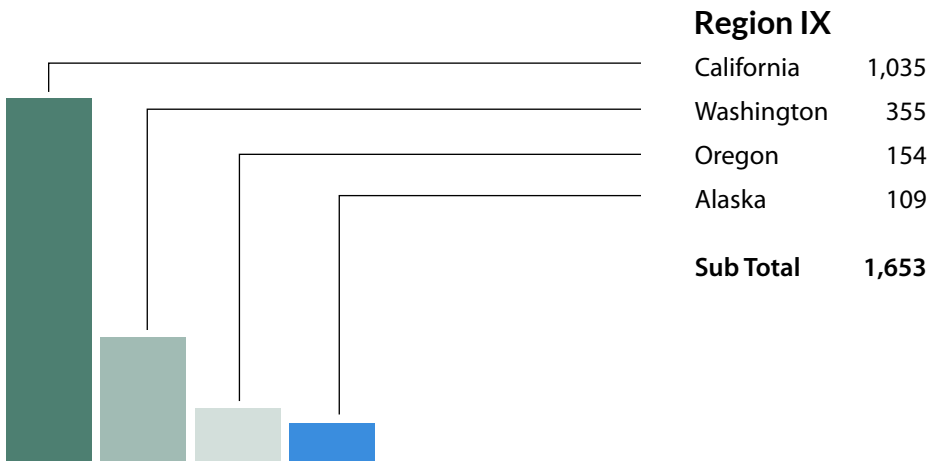
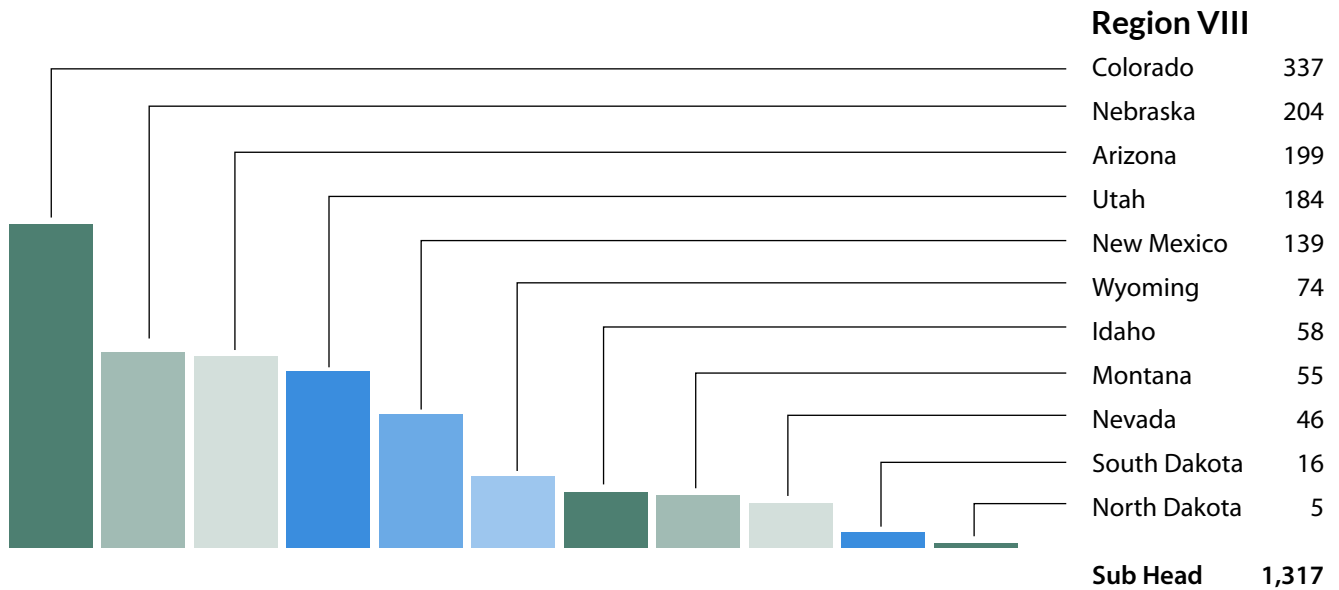
The following chart represents IIMC membership in each state, province and country. As of September 2020, California leads all states in membership with 1,035. Region XI (Outside North America) leads all Regions in total membership with 5,268. British Columbia leads all members in Canada with 107. England leads all countries in Region XI with 4,732 members, followed by the Netherlands with 513. IIMC's total membership is 14,572.



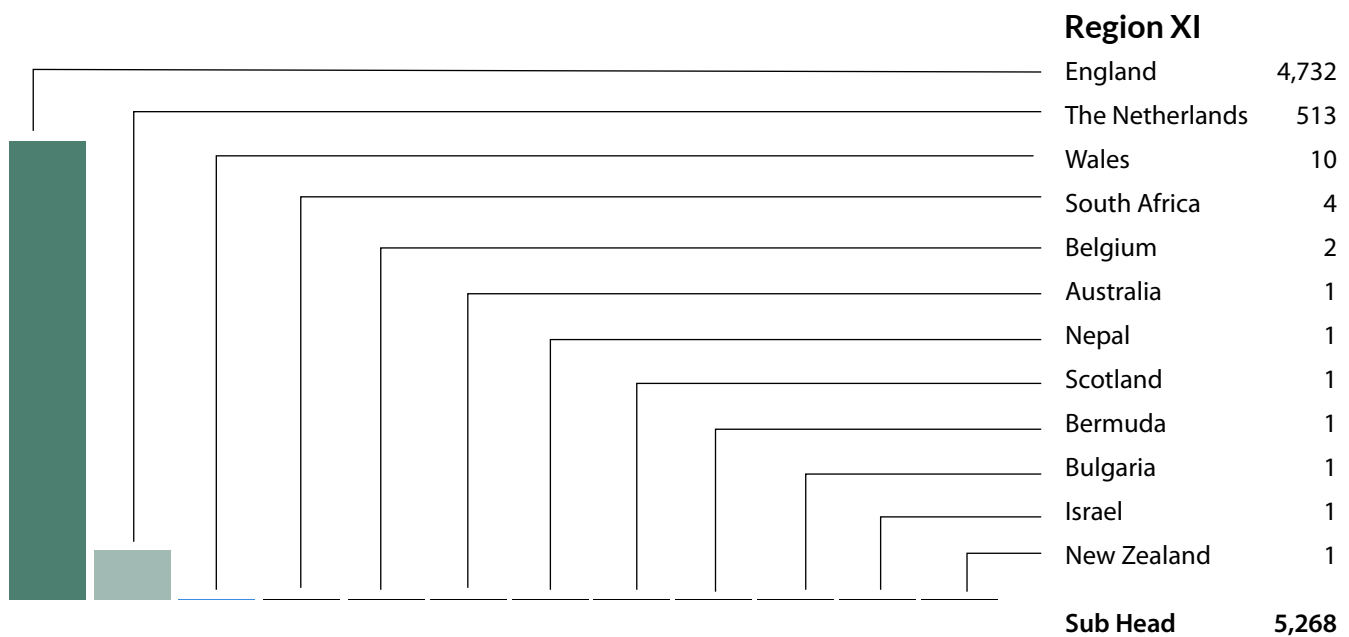
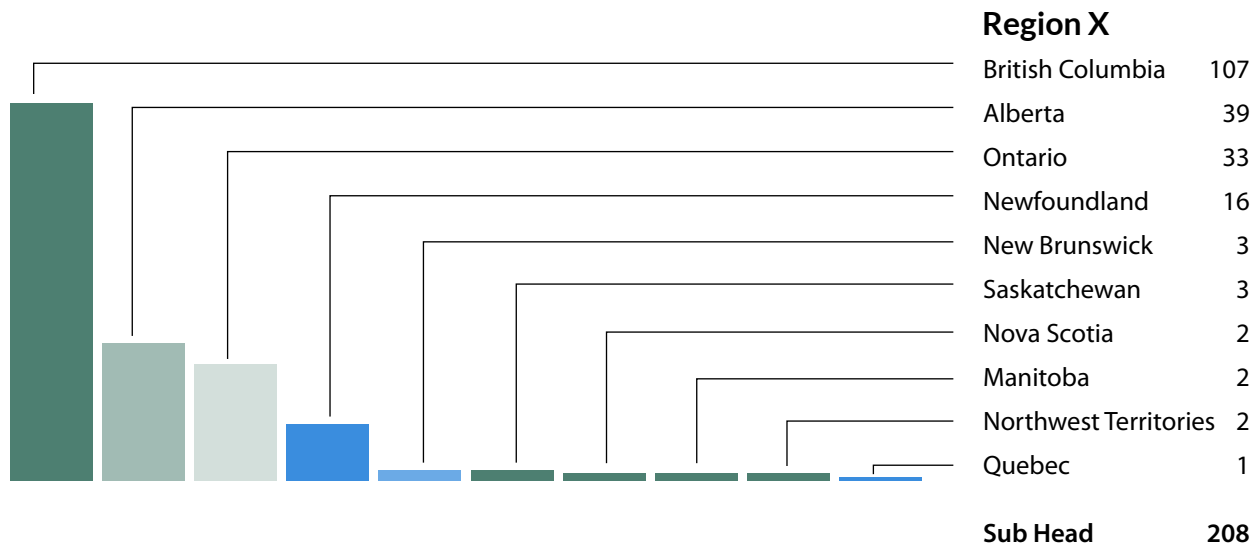
IIMC State/Regional/National Membership (continued)



IIMC State/Regional/National Membership (continued)



IIMC State/Regional/National Membership (continued)



Total Membership 14,572

IIMC Board of Directors



PRESIDENT
Lana McPherson, MMC
*City Clerk
De Soto, KS*



PRESIDENT ELECT
Mary Johnston, MMC
*Clerk of Council/Records
Westerville, OH*



VICE PRESIDENT
Sheri Pierce, MMC
*City Clerk
Valdez, AK*



IMMEDIATE PAST PRESIDENT
Stephanie C. Kelly, MMC
*City Clerk
Charlotte, NC*

DIRECTORS – 2020 EXPIRATION

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

Janice L. Almy, MMC
*City Clerk
Sand Springs, OK
Region IV*

Audra J. Etzel, MMC
*Deputy Clerk
Rockford, MN
Region VI*

Kerry Rozman, MMC
*City Clerk
Clay Center, KS
Region VII*

RaNae Edwards, MMC
*City Clerk,
Grand Island, NE
Region VIII*

Bonnie Hilford, CMC
*Deputy City Clerk
Calgary, Alberta, Canada
Region X*

Kathryn Richmond, CMC
*Town Clerk
Waltham Abbey, United Kingdom
Region XI*

DIRECTORS – 2021 EXPIRATION

Sandra “Sandy” Pinsonault, MMC
*Town Clerk,
Dorset, VT
Region I*

Sonja Tolbert, CMC
*City Clerk
Albany, GA
Region III*

Leticia Vacek, MMC
*Town Secretary
Trophy Club, TX
Region IV*

Leon Wright, MMC
*Township Clerk,
Van Buren, MI
Region V*

Marie A. Moe, MMC
*City Clerk
Portage, WI
Region VI*

Helen Ingold, MMC
*City Clerk,
Crestwood, MO
Region VII*

Dawn G. Abrahamson, MMC
*City Clerk
Vallejo, CA
Region IX*

Hans Rijs, MMC
*City Clerk
Bodegraven-Reeuwijk, The Netherlands
Region XI*

DIRECTORS – 2022 EXPIRATION

Ann Quirk, MMC
*Town Clerk
Barnstable, MA
Region I*

Teresa “Terri” K. Hudson, MMC
*City Clerk
Milford, DE
Region II*

Camilla Pitman, MMC
*City Clerk
Greenville, SC
Region III*

Janis Bates, MMC
*Executive Secretary/Clerk of Council
Tipp City, OH
Region V*

Lisa Garcia, MMC
*Deputy Town Manager/Town Clerk
Florence, AZ
Region VIII*

Scott Passey, MMC
*City Clerk
Edmonds, WA
Region IX*

Angila Bains, CMC
*Manager Legislative Services/
Municipal Clerk
District of Saanich, BC, Canada
Region X*

