



# 2017

## ANNUAL REPORT

Montreal 2017



### **Foundation Mission**

The IIMC Foundation is a diverse team of volunteers who are passionately committed to raising endowed dollars whose earnings help IIMC pursue its educational objectives.

## BOARD OF DIRECTORS



### President

Colleen Nicol, MMC  
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Fort Atkinson, WI



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Rancho Cucamonga, CA

*Let Us Grow Together!*



## Colleen J. Nicol, MMC

### IIMC Foundation President

#### Dear IIMC Members and IIMC Foundation Donors:

I'm pleased to report on the activities of the IIMC Foundation for 2017 which included a Strategic Plan, refresh of the Foundation's Amazon Smile account, continuation of ongoing fundraising events, creation of new marketing materials, and development of a dedicated web site. The Foundation wishes to be great stewards of your donations, support the education programs important to you and make giving easy.

#### Stewardship - Where the Money Comes From

Thanks to the support of IIMC members, Foundation revenue reached \$135,969 during 2017. Voluntary donations on the annual IIMC dues statement offers an easy way for all IIMC members to give. Encourage colleagues to grow this important revenue source. 2017/18 IIMC President Mary Kayser, MMC, shared the story of the Foundation to IIMC members as she visited Municipal Clerk Associations and individuals throughout all IIMC Regions. The IIMC Executive Committee actively participates in fundraising and promotion of the Foundation. Voluntary donations, endowment contributions and growth, and Conference activities, including the popular Hawaii Raffle and Silent Auction, continue to provide significant income.

#### INCOME - 2017

Dues Contributions	\$48,765
Sponsorships	7,875
Society Donations	16,377
Silent Auction	6,445
Endowments	37,805
Memorials/Tributes	1,550
Raffles	9,462
Conference T-Shirts	7,690
<b>TOTAL INCOME</b>	<b>\$135,969</b>

Throughout the year and at the Montreal conference, IIMC Members were again offered fun opportunities to donate to the Foundation including:

- Voluntary donation with IIMC dues renewal,
- Hawaii trip raffle,
- Society donations,
- Silent auction,
- T-shirt sales,
- Memorial gifts, and
- Legacy Program.

The IIMC Foundation Legacy Program provides IIMC retirees and members an opportunity to be remembered and to continue supporting education programs. More information on the Legacy Program can be found at [www.iimc.com](http://www.iimc.com) or by contacting a Foundation Board Member.

The four new restricted endowments created this year will provide Institute and other education scholarships into the future.

#### Stewardship - Education Programs - Where the Money Goes

#### CONTRIBUTIONS TO IIMC 2017

IIMC Education Programs for 2016	\$34,496	37.15%
IIMC Education Programs for 2017	46,580	50.16%
Scholarships-Restricted Funds	6,075	6.54%
Scholarships-Unrestricted Funds	2,200	2.37%
S/P/N Association Grants	0	0.00%
LaserFiche ID Colloquium	3,514	3.78%
<b>TOTAL</b>	<b>\$92,865</b>	<b>100.00%</b>

#### OPERATING EXPENSES - 2017

Board Travel	\$ 10,221
Professional Fees	20,980
Supplies/Printing/Postage	5,501
Name Change	235
<b>TOTAL</b>	<b>\$36,937</b>



**Colleen J. Nicol, MMC**  
IIMC Foundation President  
Continued from page 3

The Foundation supported education programs, CMC/MMC scholarships, Region stipends, and annual conference grants. Professional fees include investment, accounting, and legal services.

2017 garnered strong gains for investments. Restricted endowments created by individuals and State/Provincial/National Associations continue to grow and annually provide CMC and MMC scholarships. Laserfiche's restricted endowment supports the Institute Director's Colloquium held at the annual conference. For more information on creating a restricted endowment, see the information at [www.iimc.com](http://www.iimc.com) or contact any IIMC Foundation Board member.

**ENDOWMENTS - YEAR END 2017**

Unrestricted	\$ 1,914,011
Restricted	586,862
<b>TOTAL</b>	<b>\$2,500,873</b>

**Making Giving Easy**

Watch for easier and direct on-line giving opportunities at [www.iimc.com](http://www.iimc.com). The 2018 Norfolk conference app will feature a "Donate Now" button. Electronic postcards alerted IIMC Members to the Foundation, its mission, and how to give.

**Donor Recognition**

Review the listing of generous donors provided in this report. Consider stepping up to the next level of giving. The annual donor reception couples with Step Up Awards presented at the Annual Conference brings awareness to remarkable givers and inspires others to join the cause. Review below the Hall of Fame, Individual, State/Provincial/National Association, and 2017 Step-Up Awards presented in Montreal.

**Hall of Honor Inductees**

- Jim Tinnin
- Vicki Miel, MMC

**Awards**

**Marc Lemoine, MMC** – *Individual Donor*

**Northern California City Clerks Association** – *State/Provincial/National Donor*

**Conchita Alvarez, MMC** – *Individual Step-Up*

**Kansas City Clerks and Municipal Finance Officers Association** – *State/Provincial National Step Up Donor*

**Thank You**

The IIMC Foundation Board of Directors sincerely thanks each and every donor with special thanks for the outstanding work of the IIMC Board of Directors and staff for assistance, marketing, fundraising ideas, and activities promoting the spirit of the Foundation's mission and growing its endowments. Many individuals have personally absorbed travel and operational expenses to keep every dollar possible earning money for IIMC's members.

In the coming year, watch for the Foundation to increase its digital presence and continue its heartfelt commitment to meet our mission to *raise endowed dollars whose earnings help IIMC pursue its educational objectives*.

Working for you,

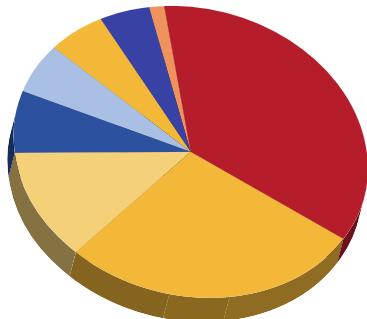
Colleen J. Nicol, MMC  
*IIMC Foundation President*

## 2017 YEAR END CHARTS



### Income - 2017

**Total Income \$135,969.00**

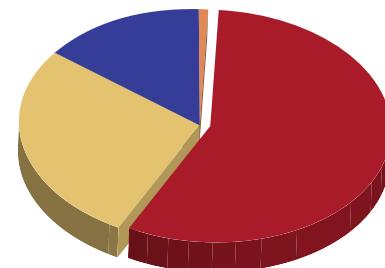


■ Dues Contributions .....	\$48,765
■ Endowments.....	37,805
■ Society Donations.....	16,377
■ Raffles .....	9,462
■ Sponsorships.....	7,875
■ Conference T-Shirts.....	7,690
■ Silent Auction .....	6,445
■ Memorials/Tributes .....	1,550

### Operating Expenses - 2017

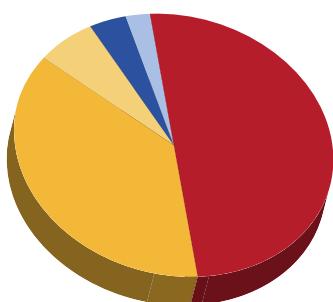
**Total Operating/Other Expenses \$36,937**

■ Professional Fees .....	\$20,980
■ Board Travel.....	10,221
■ Supplies/Printing/Postage.....	5,501
■ Name Change.....	235



### Contributions to IIMC - 2017

**Total \$92,865**

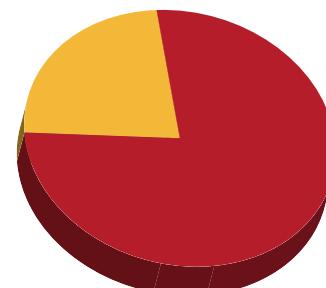


■ IIMC Education Programs for 2017 .....	\$46,580
■ IIMC Education Programs for 2016 .....	34,496
■ Scholarships - Restricted Funds .....	6,075
■ Laserfiche ID Colloquium.....	3,514
■ Scholarships - Unrestricted Funds .....	2,200
■ S/P/N Association Grants.....	0

### Endowments - Year End 2017

**Total \$2,500,873**

■ Unrestricted.....	\$1,914,011
■ Restricted .....	586,862





## Endowed Education Funds and Scholarships

- ▲ A. Fleming Bell Education Fund
- ▲ American Legal Publishing Corporation Education Fund
- ▲ Barstow Family Education Fund
- ▲ Business Records Corporation Education Fund
- ▲ California City Clerks Education Fund
- ▲ Charlie Buttiglieri Education Fund
- ▲ Chris & Patrick Wilder Education Fund
- ▲ City Clerks of California Scholarship Fund (CA Clerks only)
- ▲ Coded Systems Education Fund
- ▲ Dyanne Reese Education Fund
- ▲ Elizabeth Kiss Education Fund
- ▲ General Code Publishing Education Fund
- ▲ iCompass Education Fund
- ▲ James B. Tinnin Education Fund
- ▲ Kayser Education Fund
- ▲ Laserfiche (Institute Directors Colloquium)
- ▲ Lyall Schwarzkopf Education Fund
- ▲ Marianne Edwards Education Fund
- ▲ Mary Lynne Stratta Education Fund
- ▲ Microvote, Inc. Education Fund
- ▲ Municipal Code Corporation Education Fund
- ▲ New Mexico Municipal Clerks Education Fund (NM Clerks only)
- ▲ Norma Rodriguez Education Fund
- ▲ OMAR Education Fund
- ▲ Region IV Education Fund
- ▲ Reynolds Miel Education Fund
- ▲ Robert T. Thorpe Scholarship Fund
- ▲ Robert W. Pritchard Education Fund
- ▲ Simmons Leadership Scholarship Fund
- ▲ Tak & Helen Kawagoe Education Fund
- ▲ Uecker Education Fund

## 2017 FOUNDATION DONORS

### Shinners

(\$1,000 and above)

Ameriprise Financial  
American Legal  
Arkansas City Clerks, Rec, Treas.  
Barstow, Dale  
Bolhauer, Ray  
Brown, Buster  
Buttiglieri, Vincent  
Elford, Faith  
Engle, Colleen  
Frommeyer, Rich  
Grant, Eric  
Hammerstrom, Bev  
Herdelin, Nils  
Laserfiche Document Imaging  
Chris Wacker  
LoVerde, Cristina  
Miel, Vicky

### Municipal Code Corporation

McDonough, Joseph  
Nicol, Colleen  
OnBase by Hyland  
Oregon Assn. Municipal Recorders  
Rasmussen, Steffanie  
Rodriguez, Norma  
Schneider, Roxanne  
Schwarzkopf, Lyall  
Stratta, Mary Lynne  
Texas Municipal Clerks  
Tinnin, James  
Uecker, Anne  
Wolf, Stephen

### Granicus

Henley, Melissa  
Karr, Marian  
Kopitke, Kittie  
Mangen, Debra  
MCCi  
McPherson, Lana  
New England Assoc  
New Mexico Municipal Clerks & FO Assn.  
Pavlica, Andrew  
Powell, Millie  
Smithers, Kristie  
Susen, Allan

### Schwarzkopf

(\$500 to \$999)  
Alvarez, Conchita  
Bell, A. Fleming  
Devine, John

### Turtle

(\$250 to \$499)  
Davis, Tracy  
Dornan, Kathryn  
Edwards, RaNae

## 2017 Foundation Donors

General Code	Region III	Fitzhenry, Diane	Perales, Anna
Goodall, Jannette	Rickard, Muriel	Frazier, June	Picco, Ann
International Institute of Municipal Clerks	Ruch, Brian	Gabel, Wanda	Pierce, Sheri
Jacobs, Carol	Tokar, Charles	Gaynor, Liz	Pinsonault, Sandra
Johnston, Mary	Vacanti, Al	Geho, Donna	Pomroy, Gail
Kansas - CCMFOA	Verrastro, Leonard	Geriminsky, Rhonda	Poole, Bruce
Lemoine, Marc	Vierling, Lisa	Graham, Miki	Prado, Roseann
Moore, Shari	Volk, Debby	Guerrero, Danielle	Quinn, Janita
Nebraska Municipal Clerks	Watkins, Sandra	Hall, Brenda	Ragona, JoAnne
Pitman, Camilla	Wisconsin Clerks/Treas. & FOA	Harlow, Christena	Reed, Cara
Pritchard, Robert	Wyoming Assn. Municipal Clerks & Treas.	Hayter, Virginia	Rees, Michele
Reese, Dyanne		Henderson, Robin	Rhude, Marita
Region II		Hensen, Lori	Romanowski, Renee
Region V	<b>Patron</b>	Hoffman, Kathleen	Roome, Bruce
Shalby, Chris	<b>(\$50 to \$99)</b>	Holtz, Marian	Sandorse, Karen
Whitbey, Diane	Almas, Sara	Ivey, Debra	Saunders, Lori
Wilder, Christina	Almy, Janice	Jacobi, Yenise	Scoggins, Sherry
<b>New Century</b>	Arizona Municipal Clerks Assn.	Jansen van Rensburg, Cherel	Scott, Leanne
<b>(\$100 to \$249)</b>	Arnold, Amy	Johnson, Damita	Seigfried, Michele
Aldrich, Priscilla	Arnold, Brenna	Jones, Donna	Shaw, Amanda
Buchholtz, Daniel	Black, Christine	Jones, Gayle	Shepherd, Tania
Cassler, Sharon	Blankenship, Johni	Keith, Linda	Shortall, Donna
Chisum, Denise	Boettcher, Sandy	Keller, Kristina	Smith, Pamela
Daudt, Janis	Brunt, Heidi	Koos, Kelly	Troyan, Linda
Deford, Connie	Busch, Bobby	Kowal, Terri	Turri, Jini
Election Systems	Carmack, Lynn	Krusznis, Annemarie	Van Remortel, Kassie
Favarro, Joseph	Chittick, Marilyn	Lang, Monique	Vann, Tameeka
Frazier, Vester	Clark, Cathy	Lawson-Scott, Cherry	Vincent, Nancy
Freeman-Wakefield, Ellen	Clark, Rachel	Legacy, Tammy	Vock, Tammy
Hess, Mary Ann	Cobb, Recarda	Lewis, Jami	White, Lynette
Iowa MFO Assn.	Coelho, Julie	Lewis, Patti	Williams, Joy
Joseph, Jessie	Covino, Cecilia	Lourie, Vladimir	Willis, Tony
Kayser, Mary	Crook, Melinda	Maine Town & City Clerks Assn.	Wingfield-Bond, Karen
Kelly, Stephanie	Davis, Debbie	Martinez Simmons, Monica	Womack, Ann
Kentucky Municipal Clerks	Dawley, Erika	McCoy, Vicki	Wynn, Kimberly
Maryland Municipal Clerks Assn.	De La O, Maria	McLean, Tom	Young, Brenda
Minnesota MCFOA	De Neui, Michelle	Melinu, Mauricio	Young, Lory
Oglesby, Sally	Dispense, Allison	Mitch, John	Zanna, Joseph
Ohio Municipal Clerks Assn.	Doerfling, Elaine	Morgan, Angela	Zawadski, Dina
Pavolas, Vaida	Dominguez, Natalie	Ochiqui, Mayra	
Rauh, Diane	Dupuis, Pattie	Ogden, Lynnette	
	Eisermann, Stephany	O'Neal, Darlene	
	Falanka, Richard	Owen, Sara	
	Finnessey, Karen		



## IIMC Foundation Memorials

The following is a list of donations made to IIMC Foundation on behalf of the deceased individuals.

### **On behalf of Anna Lou Becker**

*International Institute of Municipal Clerks*  
Roxanne Schneider

### **On behalf of Bernice McCain**

*Mary Lynne Stratta*

### **On behalf of Bill Starr**

*Colleen Nicol*

### **On behalf of Bobby Ogden**

*International Institute of Municipal Clerks*

### **On behalf of Brian Wischropp**

*International Institute of Municipal Clerks*

### **On behalf of Cecil Goatley**

*International Institute of Municipal Clerks*

*Mary Lynne Stratta*

*Colleen Nicol*

### **On behalf of Deanna Simank**

*Mary Lynne Stratta*

### **On behalf of Dorothy Mallett**

*Mary Lynne Stratta*

### **On behalf of Helen Leon Melendrez**

*Colleen Nicol*

### **On behalf of Luis Alvarado**

*International Institute of Municipal Clerks*

### **On behalf of Manuela Alvarado**

*International Institute of Municipal Clerks*

### **On behalf of Martin Byron Heiland, Jr.**

*Colleen Nicol*

### **On behalf of Mary Pat Kaszane**

*Donna Shortall*



**Individual Donor Award** – Marc Lemoine Winnipeg, Manitoba, Canada; **Association Award** – Northern California City Clerks Association (CCAC President Jose Jasso accepted);

**Individual Step Up Award** – Conchita Alvarez, Key Biscayne, Florida;

**Association Step Up Award** – Kansas City Clerks and Municipal Finance Officers Association (Debbie Price, President accepted)

## IIMC Foundation Awards at Montreal Conference



The Foundation inducted several longtime supporters to the Hall of Honor including IIMC Past President Vicky Miel, MMC, (pictured left) a former Foundation Board member, and Jim Tinnin, (not pictured) the former Ohio Institute Director and Foundation Board member.