



# 2019 IIMC ANNUAL REPORT



## 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



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Chris G. Shalby  
IIMC Executive Director  
Rancho Cucamonga, CA

### Non-Voting Member

*Let Us Grow Together!*



## Mary Lynne Stratta, MMC IIMC Foundation President

Dear IIMC Members and IIMC Foundation Supporters:

On behalf of the IIMC Foundation Board, I am pleased to provide this report about the Foundation's 2019 activities. It was a stellar year that saw the launch of the Foundation's first dedicated e-newsletter, continued content and functionality growth of the Foundation website ([www.iimcfoundation.com](http://www.iimcfoundation.com)), ongoing fund raising events, scholarship awards, conference grants, donor honors, region educational grants and support for IIMC education programs. The new Foundation Development Committee was created to educate the IIMC membership about the important functions of the Foundation and to serve as a springboard for future IIMC Foundation Board members. New methodologies to make giving easier were also launched.

### Purpose of the IIMC Foundation

The IIMC Foundation was created in 1984 as a non-profit organization that would raise endowed dollars whose earnings help IIMC and its members pursue their educational endeavors. That remains our objective as of today. The Foundation's corpus as of December 31, 2019, was \$2,884,760. Of that amount, \$2,155,985 is in the unrestricted fund, and \$728,775 resides in restricted funds. The interest earned on the corpus is what is used to fund the Foundation's support of IIMC and its members' educational needs.

### Stewardship – Sources of Revenue

Thanks to the support of IIMC members and Foundation partners, revenue received in 2019 was \$184,209. There are many easy ways to support the Foundation, which were again offered in 2019: Voluntary donations through the annual IIMC dues statement; Amazon Smile; sponsorships; society donations; the annual silent auction; endowments; memorial gifts and tributes; fundraisers including the Hawaii trip, the conference registration, jewelry and Santa Claws crab claws; conference t-shirts and bracelets; IIMC Conference app donations; and, now, the Roundup app.

### INCOME - 2019

Voluntary Contributions from IIMC Members	\$53,645
Sponsorship from IIMC	12,321
Society Donations	14,251
Silent Auction	10,278
Endowments	65,916
Memorials/Tributes	4,480
Raffles (HI Trip, Conf Reg, Misc)	13,450
Conference T-Shirts	5,300
Conference Bracelets	405
Exhibit Hall Royalty	3,700
Other	463
<b>TOTAL INCOME</b>	<b>\$184,209</b>

The IIMC Foundation Legacy Program offers IIMC retirees and members an avenue to be remembered and continued support of educational programs and Clerk scholarships. Additional information about the Legacy Program can be found on the Foundation's website at <https://www.iimcfoundation.com/general/page/leave-your-legacy> or contact a Foundation Board member.

New restricted endowments created this year, along with existing endowments, will provide Institute and other education scholarships in the future. The Foundation's long-standing conservative approach to investment management has resulted in our ability to continue to offer educational dollars and scholarships to IIMC and its members.

### Stewardship – Where the Money Goes

In 2019, the Foundation continued to support IIMC and region education programs, CMC/MMC scholarships, online learning scholarships and annual conference grants. The Foundation pays professional fees that include investment, legal and accounting services.

*Continued on page 4*

## OPERATING EXPENSES - 2019

Board Travel	\$ 838
Professional Fees	19,505
Supplies/Printing/Postage (includes SA/Conf)	3,138
<b>TOTAL</b>	<b>\$23,481</b>

## CONTRIBUTIONS TO IIMC 2019

2018 Education Funds to IIMC	\$51,479
Restricted CMC & MMC Scholarships	10,000
Unrestricted CMC & MMC Scholarships	2,800
Distance Learning	800
<b>Total Operating/Other Expenses</b>	<b>\$88,560</b>

Restricted endowments created by individuals, state/provincial/region/national associations and corporate sponsors continue to grow and provide CMC and MMC scholarship funds annually. In 2019, the Foundation funded 38 CMC/MMC scholarships of \$400 each to IIMC members pursuing certification. In addition, the Foundation funded 120 online learning scholarships through the 2019 application process. For more information about the creation of a restricted endowment, visit [www.iimcfoundation.com/general/page/how-you-can-contribute](http://www.iimcfoundation.com/general/page/how-you-can-contribute) or visit with any Foundation Board member.

Year End 2018 Unrestricted	\$ 1,812,768
Year End 2018 Restricted	575,481
<b>Year End Total Value 2018</b>	<b>\$2,388,249</b>

Year End 2019 Unrestricted	\$ 2,155,985
Year End 2019 Restricted	728,775
<b>Year End Total Value 2019</b>	<b>\$2,884,760</b>

Partake of the new giving methodologies, such as Roundup. Monthly contributions by bank draft or credit card are easy to set up and allow continued support hassle free.

## Donor Recognition

This report contains the names of donors who supported the Foundation at the level of \$50 or more in 2019. Many thanks for your generosity. Please consider stepping up to the next level of giving. Who knows – you may see your name listed below as an award recipient!

The following were honored at the IIMC annual conference in Birmingham with 2019 Foundation awards for their continued support:

Hall of Honor Inductee – **Marian Karr**

Individual Donor Award – **Fleming Bell**

Individual State/Provincial/Region/National Association Award – **Ohio Municipal Clerks Association**

Individual Step Up Award – **Stella Atoruk**

State/Provincial/Region/National Association Step Up Award – **Municipal Clerks and Finance Officers Association of Minnesota**

Corporate Donor Award (new category) – **American Legal Publishing**

## Thank You

The Foundation Board thanks the IIMC Board for its efforts to encourage member support throughout all regions. We also express our thanks to the IIMC staff for their support and kind assistance.

The Foundation Board expresses deep appreciation and gratitude to all who have supported the Foundation through donations, fundraiser participation, silent auction donations, raffle participation, endowed dollars, etc.

And last, but not least, my personal thanks to the IIMC Foundation Board members who utilize their own time and absorb their own travel expenses in order to have more money available for clerk education. Your hard work, commitment and generosity are second to none! I know I speak for the entire membership when I say thank you for all you do!

Look for more exciting Foundation news in 2020 and remember, when we all give a little, we all learn a lot!

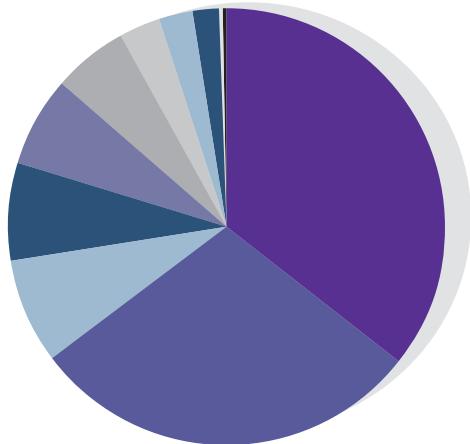
Working for IIMC members,

**Mary Lynne Stratta, MMC**  
**IIMC Foundation President**

## 2019 YEAR END CHARTS



### Income - 2019 Total Income \$184,209

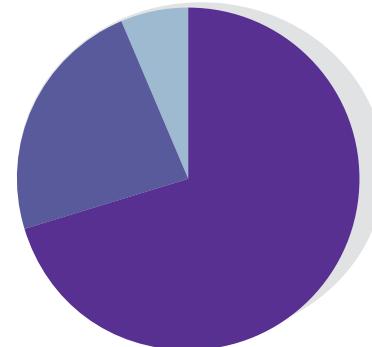


■ Endowments .....	\$65,916
■ Voluntary Contributions from IIMC members .....	\$53,645
■ Society Donations .....	\$14,251
■ Misc Raffles (HI Trip, Conf Reg, Misc) .....	\$13,450
■ Sponsorships from IIMC .....	\$12,321
■ Silent Auction .....	\$10,278
■ Conference T-shirts .....	\$5,300
■ Memorials & Tributes .....	\$4,480
■ Exhibit Hall Royalty .....	\$3,700
■ Other .....	\$463
■ Conference Bracelets .....	\$405

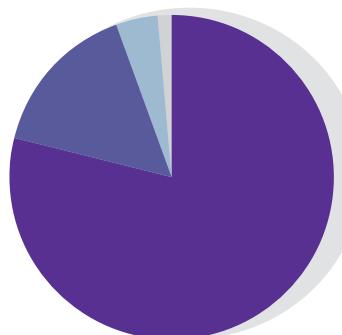
### Operating Expenses - 2019

Total Operating/Other Expenses \$88,560

■ Professional Fees .....	\$19,505
■ Supplies/Printing/Postage .....	\$3,138
(Includes SA/ Conf)	
■ Board Travel .....	\$838



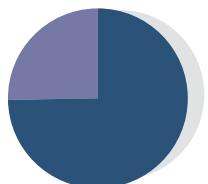
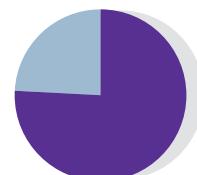
### Annual Contributions to IIMC Educational Programs Total \$65,079



■ IIMC Education Funds - 2018 .....	\$51,479
■ Restricted CMC & MMC Scholarships .....	\$10,000
■ Unrestricted CMC & MMC Scholarships .....	\$2,800
■ Distance Learning .....	\$800

### Endowment Funds

■ Year End 2018 Unrestricted .....	\$1,812,768
■ Year End 2018 Restricted .....	\$575,481
<b>Year End Total Value 2018 .....</b>	



■ Year End 2019 Unrestricted .....	\$2,155,985
■ Year End 2019 Restricted .....	\$728,775
<b>Year End Total Value 2018 .....</b>	

## Endowed Education Funds and Scholarships

- A. Fleming Bell Education Fund
- American Legal Publishing Corporation Education Fund
- Anne Uecker Education Fund
- Barstow Family Education Fund
- Business Records Corporation Education Fund
- California City Clerks Education Fund
- Charles & Stephanie Kelly Endowment Fund
- Charlie Buttiglieri Education Fund
- Chris & Patrick Wilder Education Fund
- City Clerks of California Scholarship Fund
- Coded Systems Education Fund
- Donna Young Scholarship Fund
- Dyanne Reese Education Fund
- Elizabeth Kiss Education Fund
- General Code Education Fund
- Granicus Education Fund
- iCompass Education Fund
- James B. Tinnin Education Fund
- Laserfiche Institute Directors Colloquium
- Lyall Schwarzkopf Education Fund
- Marianne Edwards Education Fund
- Mary Kayser Education Fund
- Mary Lynne Stratta Education Fund
- Microvote, Inc. Education Fund
- The Monica Martinez Simmons Leadership Scholarship Fund
- Municipal Clerks Assn. of New Jersey Endowment
- Municipal Code Corporation Education Fund
- Nebraska Education Fund
- New Mexico Municipal Clerks Education Fund
- Norma Rodriguez Education Fund
- Oregon Association of Municipal Recorders
- IIMC Region IV Education Fund
- Reynolds Miel Education Fund
- Robert T. Thorpe Scholarship Fund
- Robert W. Pritchard Education Fund
- Tak & Helen Kawagoe Education Fund

## 2019 FOUNDATION DONORS

### Shinners

(\$1,000 and above)

American Legal Publishing  
Barstow, Dale  
Bollhauer, Ray  
Bonneville, James  
Brown, Buster  
Buttiglieri, Vincent  
Cassler, Sharon  
De Llamas, Caroline  
Diligent  
Donna Young Estate  
Engel, Colleen  
Frommeyer, Rich  
General Code  
Grant, Eric  
Hammerstrom, Bev

Herdelin, Nils

Heupel, Ross

Kayser, Mary

Kelly, Stephanie

Laserfiche Document Imaging

LoVerde, Cristina

Martinez Simmons, Monica

McDonough, Joseph

McPherson, Lana

Miel, Vicki

Moore, Shari

Municipal Clerks Assoc of NJ

Municipal Code Corporation

Nicol, Colleen

Oregon Assoc Municipal Recorders

Pavlica, Andrew

Prime Government Solutions

Rodriguez, Norma

Schneider, Roxanne

Schwarzkopf, Lyall

Stratta, Mary Lynne

Tinnin, James

Uecker, Anne

University of Nebraska at Omaha

Wacker, Chris

Wayman, Peter

Wolf, Stephen

### Schwarzkopf

(\$500 to \$999)

Alaska Assn of Municipal Clerks  
Bell, A. Fleming  
Davis, Tracy  
Devine, John

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## 2019 Foundation Donors

Goodall, Jannette	<b>New Century</b> (\$100 to \$249)	Arkansas City Clerks, Rec, Treas	Galloway, Diana
Granicus		Barnes, Emma	Garcia, Christina
Henley, Melissa		Bavin, Megan	Garner, Schenika
Hussey, Wayne		Benson, Kimberly	Geffert, Adam
IIMC		Birdyshaw, Sandra	Geletei, Paula
Jacobs, Carol		Blackard, Barbara	Giercyk, Teri
Johnston, Mary		Bobrowski, Michele	Goering, William
Kofile		Bocook, Janice	Gray, Angelica
Kopitke, Kittie		Borchers, Laura	Gutierrez-Robles, Julie
Mangen, Debra		Bracamontes, June	Hazelwood, Geri
MCCI		Carig-Bragg, Ellen	Hensen, Lori
New Mexico Municipal League		Brooks, Erika	Hilford, Bonnie
OnBase by Hyland		Brown, Chenay	Hillegeist, Heather
Romanowski, Renee		Bruckman, Sara	Hinrichs, Kimberly
SHURE		Bryant, Sandra	HRasky, Ronda
SMARSH		Buck, Karen	Huber, Gay
Susen, Allan		Burroughes, Claire	Ingold, Helen
Texas Municipal Clerks		Butler, Eliza	Jackson, Suzanne
<b>Turtle</b> (\$250 to \$499)	<b>City Clerks and Finance Officers Assn. of Kansas</b>	Cain, Tracey	Johnson, Carrie
Edwards, RaNae	<b>Kentucky Municipal Clerks</b>	Campos, Amanda	Johnson, Damita
Etzel, Audra	Larsen, Linda R	Carrara, Stephanie	Johnston, Denise
Fletcher, Jan	Lemoine, Marc	Choate, Peggy	Johnston, Lisa
Hudson, Teresa	<b>Maryland Municipal Clerks Assn</b>	Clark, Cathy	Jones, Cynthia
Iowa MFO Assn	O'Connor, Marcella	Cobb, Recarda	Jones, Dale
Minnesota MCFOA	Ragona, JoAnne	Corder, Alicia	Jones, Katherine
Mississippi Clerks Assn	Reese, Dyanne	Corley, Kim	Karr, Marilyn
Ohio Municipal Clerks Assn	Rekemeyer, Deanna	Cova, JoAnn	Kennedy, Natasha
Pitman, Camilla	Roberts, Thomas	Crook, Melinda	King, Sharon
Powell, Millie	Rozman, Kerry L.	Crouch, Christine	Kinville, Donna
Shalby, Chris	Ruch, Brian	Crough, Robin	Koger, Jim
Tokar, Charles	Smithers, Kristie	Cunningham, Andrea	Krusznis, Annemarie
Volk, Debby	Tripp, Terry	Cure, Sherry	Legacy, Tammy
Wilder, Christina	Whitbey, Diane	Darany, George	Leslie, Pam
Wisconsin Clerks/Treas & FOA	<b>Patron</b> (\$50 to \$99)	Devine, Irma	LeViner, Janet
	Ahart, Brian	Dillon, Rebecca	Lewis, Jami
	Almy, Janice	Elford, Faith	Lewis, Patti
	Anderson, Leisa	Enterkin, Janise	Lycette, Twila
		Ewald, Rayla Sue	Mabry, Amanda
		Falowski, Amy	Mandley, Danielle
		Fink, Mia	Martin, Carin
		Forgey, Yael	Martinez-Gomez, Nora
		Fortenberry, Servia	McElyea, Lisa
			Mericle, Carol

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## IIMC Foundation Memorials

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

### **On behalf of John Hunnewell**

*Dale Barstow  
Buster Brown  
Vincent Buttiglieri  
Sharon Cassler  
Brenda Cirtin  
John Devine  
Bev Hammerstrom  
Wayne Hussey  
IIMC  
Mary Johnston  
Stephanie Kelly  
Linda R. Larsen  
Marc Lemoine  
Monica Martinez Simmons  
Lana McPherson  
Vicky Miel  
Colleen Nicol  
Marcella O'Connor  
Robert Pritchard  
Muriel Rickard  
Thomas Roberts  
Norma Rodriguez  
Roxanne Schneider  
Mary Lynne Stratta  
Terry Tripp  
Susan Vanderpool*

### **On behalf of Linda Joyce Story**

*Colleen Nicol*

### **On behalf of Mike Mallory**

*Sharon Cassler*

### **On behalf of Miriam Johns**

*Colleen Nicol*

### **On behalf of Pauline Small**

*Mary Lynne Stratta*

### **On behalf of R.P. Stevens, Jr.**

*Dale Barstow*

*IIMC*

*Roxanne Schneider*

*Mary Lynne Stratta*

### **On behalf of Robert James Gragg**

*Mary Lynne Stratta*

### **On behalf of Sean Aaron Hudson**

*Teresa Hudson*



## IIMC Foundation Memorials

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

### On behalf of Ruby White

*Mary Lynne Stratta*

### On behalf of Sandra Hollan Woodall

*IIMC*

### On Behalf of Stephanie Kalasz-Flowers

*Dale Barstow*

*Vincent Buttiglieri*

*Sharon Cassler*

*Brenda Cirtin*

*IIMC*

*Colleen Nicol*

*Roxanne Schneider*

### On behalf of Trecia Bates

*Sharon Cassler*

*IIMC*

### On behalf of William Bill Hamilton Oglesby, II

*IIMC*

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Michigan Assn of MC (MAMC)	Rickard, Muriel	Tisdall, Tammy	Snider, D. Danyelle
Miranda, Maria	Rickman, Jane	Town of Youngman	Solomon, Elaine
Moore, Kristi	Ridley, Denise	Utah Municipal Clerks Assn	Spicer-Sidbury, Penelope
Moore, Wesley	Rios, Myrna	Vanderpool, Susan	Stanker, Kim
Morris, Lisa	Romero, Julie	Vann, Tameeka	Strimple, Eric
Muscoreil, A. Diane	Russell, Denise	Vierling, Lisa	Taylor, Wanda
Muttie, Maureen	Sanchez, Sabdi	Visocsky, Shannon	Troyan, Linda
Newkirk, Kathleen	Saxton, Gregory	Walker, Presetta	VanBlargan, Clara
Newsome, Nikima	Schillaci, Gina	Walter, Sonia	Vincent, Nancy
Osborne, Cynthia	Sexton, Sandy	Weber, Allison	Virginia Municipal Clerks Assn.
Paserchia, Francine	Shuravloff	West, Jennifer	Visit Norfolk
Paul-Lyle, Sandy	Sims Hollowell, Belinda	White, Emma	Convention Bureau
Pavolas, Vaida	Sims, Tish	White, Jean	Wainwright, Vicki
Petersen, Lisa	Smart, Nicole	White, Lynette	Walker, Kathy
Pierce, Sheri	Smith, Paula	Williams, Dana	Walton, Angela
Pinsonault, Sandra	Stewart, Victoria	Williams, Kaneilia	White, Bernie
Pocklington, Stephanie	Stickles, Tara	Womack, Ann	White, Lynette
Pomroy, Gail	Summers, Kim	Wright, Leon	Womack, Ann
Pritchard, Robert	Sutter, Kim	Young, Brenda	Wright, Leon
Rappe, Linda	Swanger, Stacy	Rogers, Gloria	Young, Brenda
Reynolds, Sandy	Thompson, Vernice	Saxton, Gregory	
Rhude, Marita	Tillery, Jennifer	Sedlak, Michael	