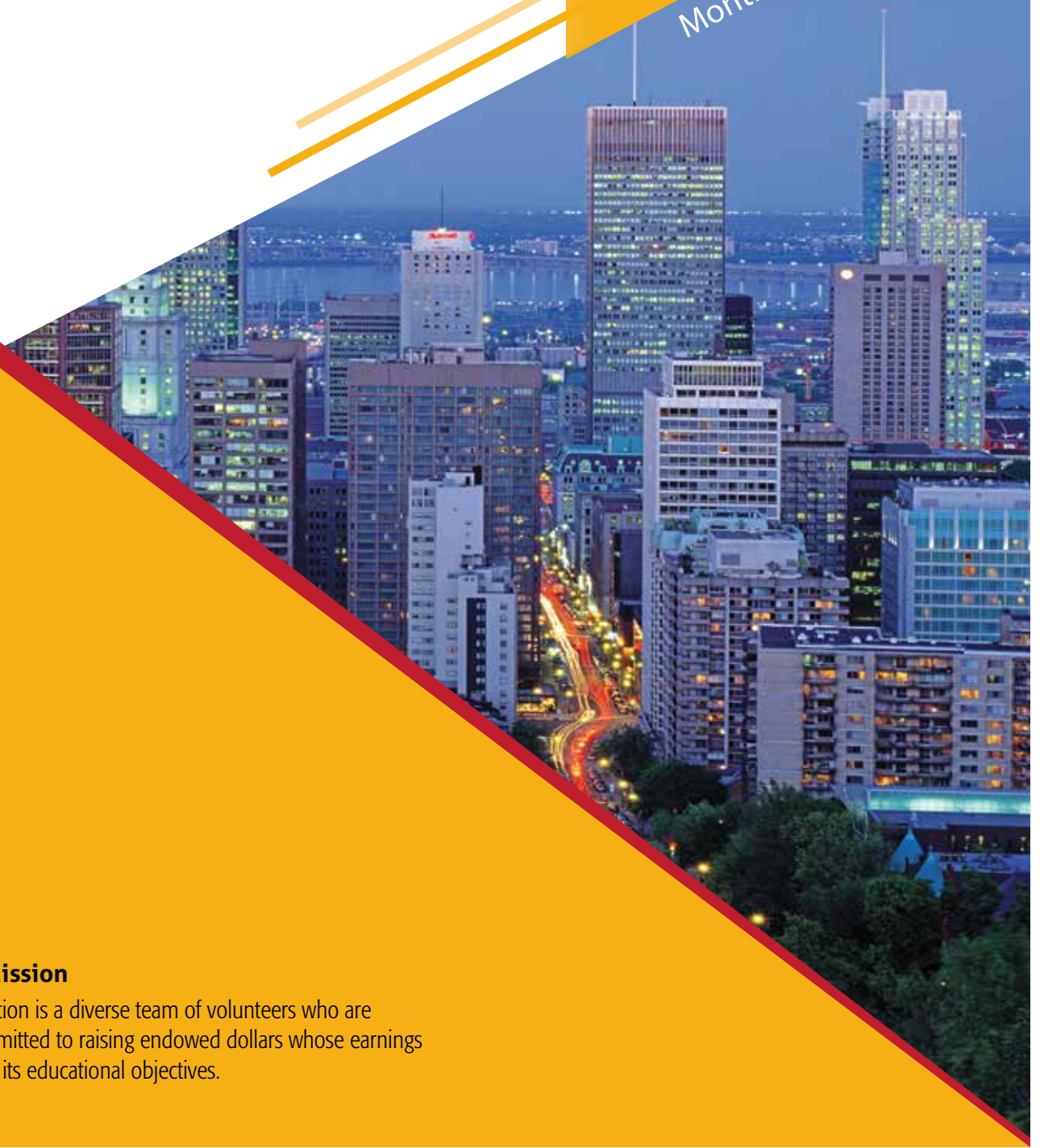




# 2017 ANNUAL REPORT

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  
Riverside, CA



### Vice President

Dale Barstow  
Tallahassee, FL



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Fort Atkinson, WI



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Stephanie Kelly, MMC  
Charlotte, NC



Lana McPherson, MMC  
De Soto, KS



Jane Anne Long, Ed.D  
Rancho Cucamonga, CA



Chris G. Shalby  
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>



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
- Vicky 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,

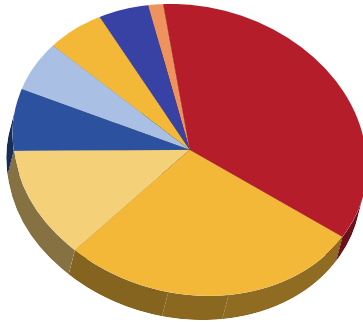
Colleen J. Nicol, MMC  
*IIMC Foundation President*



## 2017 YEAR END CHARTS

### Income - 2017

Total Income **\$135,969.00**

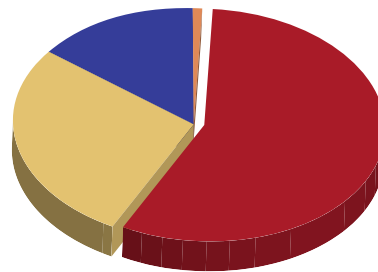


■ Dues Contributions .....	\$48,765
■ Endowments.....	37,805
■ Society Donations.....	16,377
■ Raffles .....	9,462
■ Sponsorships.....	7,875
■ Conference T-Shirts.....	7,690
■ Silent Auction .....	6,445
■ Memorials/Tributes .....	1,550

### Operating Expenses - 2017

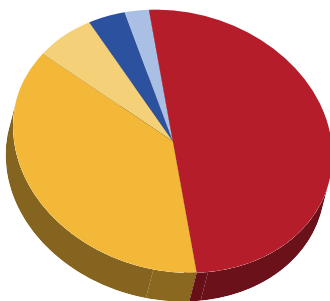
Total Operating/Other Expenses **\$36,937**

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



### Contributions to IIMC - 2017

Total **\$92,865**

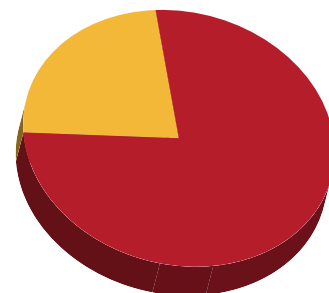


■ IIMC Education Programs for 2017 .....	\$46,580
■ IIMC Education Programs for 2016 .....	34,496
■ Scholarships - Restricted Funds .....	6,075
■ Laserfiche ID Colloquium .....	3,514
■ Scholarships - Unrestricted Funds .....	2,200
■ S/P/N Association Grants.....	0

### 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

### Shiners

(\$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

### Schwarzkopf

(\$500 to \$999)

Alvarez, Conchita  
Bell, A. Fleming  
Devine, John

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

### Turtle

(\$250 to \$499)

Davis, Tracy  
Dornan, Kathryn  
Edwards, RaNae



## 2017 Foundation Donors

General Code  
Goodall, Jannette  
International Institute  
of Municipal Clerks  
Jacobs, Carol  
Johnston, Mary  
Kansas - CCMFOA  
Lemoine, Marc  
Moore, Shari  
Nebraska Municipal Clerks  
Pitman, Camilla  
Pritchard, Robert  
Reese, Dyanne  
Region II  
Region V  
Shalby, Chris  
Whitbey, Diane  
Wilder, Christina

### New Century (\$100 to \$249)

Aldrich, Priscilla  
Buchholtz, Daniel  
Cassler, Sharon  
Chisum, Denise  
Daudt, Janis  
Deford, Connie  
Election Systems  
Favaro, Joseph  
Frazier, Vester  
Freeman-Wakefield, Ellen  
Hess, Mary Ann  
Iowa MFO Assn.  
Joseph, Jessie  
Kayser, Mary  
Kelly, Stephanie  
Kentucky Municipal Clerks  
Maryland Municipal  
Clerks Assn.  
Minnesota MCFOA  
Oglesby, Sally  
Ohio Municipal Clerks Assn.  
Pavolas, Vaida  
Rauh, Diane

Region III  
Rickard, Muriel  
Ruch, Brian  
Tokar, Charles  
Vacanti, Al  
Verrastro, Leonard  
Vierling, Lisa  
Volk, Debby  
Watkins, Sandra  
Wisconsin Clerks/Treas. & FOA  
Wyoming Assn. Municipal  
Clerks & Treas.

### Patron

(\$50 to \$99)

Almas, Sara  
Almy, Janice  
Arizona Municipal Clerks Assn.  
Arnold, Amy  
Arnold, Brenna  
Black, Christine  
Blankenship, Johni  
Boettcher, Sandy  
Brunt, Heidi  
Busch, Bobby  
Carmack, Lynn  
Chittick, Marilyn  
Clark, Cathy  
Clark, Rachel  
Cobb, Recarda  
Coelho, Julie  
Covino, Cecilia  
Crook, Melinda  
Davis, Debbie  
Dawley, Erika  
De La O, Maria  
De Neui, Michelle  
Dispense, Allison  
Doerfling, Elaine  
Dominguez, Natalie  
Dupuis, Pattie  
Eisermann, Stephany  
Falanka, Richard  
Finnessey, Karen  
Fitzhenry, Diane  
Frazier, June  
Gabel, Wanda  
Gaynor, Liz  
Geho, Donna  
Geriminsky, Rhonda  
Graham, Miki  
Guerrero, Danielle  
Hall, Brenda  
Harlow, Christena  
Hayter, Virginia  
Henderson, Robin  
Hensen, Lori  
Hoffman, Kathleen  
Holtz, Marian  
Ivey, Debra  
Jacobi, Yenise  
Jansen van Rensburg, Cheral  
Johnson, Damita  
Jones, Donna  
Jones, Gayle  
Keith, Linda  
Keller, Kristina  
Koos, Kelly  
Kowal, Terri  
Krusznsis, Annemarie  
Lang, Monique  
Lawson-Scott, Cherry  
Legacy, Tammy  
Lewis, Jami  
Lewis, Patti  
Lourie, Vladimir  
Maine Town &  
City Clerks Assn.  
Martinez Simmons, Monica  
McCoy, Vicki  
McLean, Tom  
Melinu, Mauricio  
Mitch, John  
Morgan, Angela  
Ochiqui, Mayra  
Ogden, Lynnette  
O'Neal, Darlene  
Owen, Sara

Perales, Anna  
Picco, Ann  
Pierce, Sheri  
Pinsonault, Sandra  
Pomroy, Gail  
Poole, Bruce  
Prado, Roseann  
Quinn, Janita  
Ragona, JoAnne  
Reed, Cara  
Rees, Michele  
Rhude, Marita  
Romanowski, Renee  
Roome, Bruce  
Sandorse, Karen  
Saunders, Lori  
Scoggins, Sherry  
Scott, Leanne  
Seigfried, Michele  
Shaw, Amanda  
Shepherd, Tania  
Shortall, Donna  
Smith, Pamela  
Troyan, Linda  
Turri, Jini  
Van Remortel, Kassie  
Vann, Tameeka  
Vincent, Nancy  
Vock, Tammy  
White, Lynette  
Williams, Joy  
Willis, Tony  
Wingfield-Bond, Karen  
Womack, Ann  
Wynn, Kimberly  
Young, Brenda  
Young, Lory  
Zanna, Joseph  
Zawadski, Dina



## 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 Kaszanek**

*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.