

# Annual Report

## 2020

*Let Us  
Grow Together!*



### **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**

Mary Lynne Stratta, MMC  
Bryan, TX



**Vice President**

Buster Brown, CMC  
Omaha, NE



**Secretary**

Colleen Nicol, MMC  
Riverside, CA



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Mary Ann Hess, MMC  
Laurel, MS



Chris G. Shalby  
IIMC Executive Director  
Rancho Cucamonga, CA



## Report from the President

Mary Lynne Stratta, MMC  
IIMC Foundation President

Dear IIMC Members and Foundation Supporters:

I know we can all agree that 2020 was a year like no other. In the midst of “you’re muted,” “where’s your mask” and “wash your hands,” the IIMC Foundation Board worked tirelessly to keep funds flowing to IIMC for Clerk education, scholarships and grants. On behalf of the dedicated members of that Board, I am pleased to submit the IIMC Foundation 2020 Annual Report.

As with our own professional and personal lives, 2020 proved to be a challenging year for the Foundation. The necessary cancellation of the IIMC Annual Conference due to the COVID pandemic also meant the loss of revenue to the Foundation by the cancellation of the silent auction, on-site raffles, t-shirt and bracelet sales and a share of exhibit hall royalties. Luckily, two of the Foundation’s partners, Municode and American Legal Publishing, stepped up to the plate and offered matching donation programs for member contributions and Hawaii raffle ticket sales, respectively, during a specified period. We can’t begin to thank them enough for their “extra” generosity during a trying time for the Foundation.

### Purpose of the IIMC Foundation – Clerk Education

Formerly known as the Municipal Clerk Education Foundation, the IIMC Foundation was established in 1984 as a non-profit organization to raise endowed dollars whose earnings help IIMC and its members address ongoing educational needs. That mission remains today.

### Giving in Support of Clerk Education

The Foundation’s corpus as of December 31, 2020, was \$3,204,672.76, with \$2,395,221.50 constituting the unrestricted fund, while \$809,451.26 was in restricted funds. Interest earned on the corpus funds the Foundation’s support of IIMC and members’ educational pursuits.

Although voluntary contributions through IIMC dues statements declined in 2020, the Foundation realized \$144,856.95 in revenue in 2020 from various sources: society donations,

voluntary contributions, Amazon Smile, sponsorships, Hawaii trip, conference registration and Santa Claws raffle ticket sales, endowments, memorial gifts, Day of Giving bag/bracelet purchases, mentor honorariums, and the additional matching grants from Municode and American Legal Publishing.

Restricted endowments created by IIMC members, state/provincial associations, regions, corporate sponsors and IIMC Foundation friends continued to increase. To learn how you can create a restricted endowment in recognition of an individual, your association, region, etc., visit the Foundation’s website at [www.iimcfoundation.com](http://www.iimcfoundation.com) or ask a Foundation Board member.

### 2020 Income

|   |                     |
|---|---------------------|
| Voluntary Contributions   | \$48,040.00         |
| Sponsorships  | \$5,611.70          |
| Society Donations   | \$28,221.00         |
| Endowments  | \$40,285.00         |
| Memorials and Tributes  | \$4,645.00          |
| Miscellaneous Raffles<br>(Hawaii trip, conference registration, etc.) | \$11,860.00         |
| 2020 Education Funds from IIMC  | \$5,277.00          |
| Conference T-shirts   | \$100.00            |
| Conference Bracelets  | \$75.00             |
| Exhibit Hall Royalties  | \$0.00              |
| Conference Silent Auction   | \$0.00              |
| Other   | \$742.25            |
| <b>TOTAL</b>  | <b>\$144,856.95</b> |

(Special matching grant monies from Municode and American Legal Publishing are reflected in Society Donations and Endowments above, respectively)

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**Mary Lynne Stratta, MMC**

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**Endowment Funds**

|                            |                |
|----------------------------|----------------|
| Year End 2019 Unrestricted | \$2,155,985.46 |
| Year End 2019 Restricted   | \$728,775.59   |
| Year End Total Value 2019  | \$2,884,760.90 |
| Year End 2020 Unrestricted | \$2,395,221.50 |
| Year End 2020 Restricted   | \$809,451.26   |
| Year End Total Value 2020  | \$3,204,672.76 |

The Foundation Board met its 2020 goal of reaching \$3 million in investments for the benefit of IIMC members’ educational needs.

This report lists the names of donors who supported the Foundation at the level of \$50 or more in 2020. Thank you for your support! Please help us provide more scholarship opportunities by stepping up your level of giving in 2021.

The following were the recipients of the Foundation’s 2020 Donor Recognition Awards. They were recognized at the IIMC conference in Grand Rapids:

- Hall of Honor - **Dale Barstow**
- Individual Award – **Kathy Dornan**
- Individual Step Up Award – **Andrew Pavlica**
- Association Award  
**Wisconsin Municipal Clerks Association**
- Association Step Up Award  
**Municipal Clerks Association of New Jersey**
- Corporate Award – **Laserfiche**
- Corporate Step Up Award (new award category) –  
**Onbase by Hyland**

**Disbursements in Support of Clerk Education**

The Foundation continued to support IIMC, CMC/MMC scholarships, online learning scholarships, and region educational grants in 2020. The Foundation also incurs annual professional fees that include investment, legal and accounting services. The Foundation received a clean, unqualified external audit for the 2019 fiscal year.

**2020 Operating Expenses**

|   |                    |
|---|--------------------|
| Professional Fees<br>(legal, audit, investment, accounting) | \$22,091.00        |
| Supplies/Printing/Postage                                   | \$2,936.48         |
| Board Travel  | \$0.00             |
| <b>SUBTOTAL</b>   | <b>\$25,027.48</b> |

**2020 Contributions to IIMC and Its members for Clerk Education**

|  |                    |
|--|--------------------|
| 2020 Education Funds to IIMC   | \$37,692.00        |
| Restricted CMC and MMC Scholarships  | \$2,765.00         |
| Unrestricted CMC and MMC Scholarships  | \$3,733.15         |
| (The above include \$1,000 region education grants and distance learning scholarships) |                    |
| <b>SUBTOTAL</b>  | <b>\$44,190.15</b> |
| <b>TOTAL DISBURSEMENTS IN 2020</b>   | <b>\$69,217.63</b> |

In 2020, the Foundation Board voted to fund \$3,600 for CMC/MMC scholarships of \$400 each and \$12,000 in online learning scholarships to be used in 2020. The Foundation also provided \$37,692 to IIMC to fund various educational needs, including region education grants.

**Take Action to Support Clerk Education**

IIMC members need our help now more than ever due to the devastating impacts of the COVID pandemic on our communities. Many towns and cities have slashed training dollars and have restricted travel for employees; however, laws and technology continue to rapidly change.

Communities simply cannot function without a well-educated Municipal Clerk. That’s where the IIMC Foundation can help, but to do so, we must have the support of all IIMC members.

It’s easy and painless to support Clerk education. Sign up to benefit the IIMC Foundation through Amazon Smile. Donate to honor a respected mentor or friend. Include a personal check for \$25 with your annual dues statement if your city will not

*Always Seek Knowledge*

## Mary Lynne Stratta, MMC

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fund the voluntary contribution. Go to our website at [www.iimcfoundation.com](http://www.iimcfoundation.com) and use the “point and pay” feature to make a donation. Sign up for a monthly bank draft or credit card charge hassle free. Buy Hawaii trip, conference registration, and Santa Claws raffle tickets. At upcoming conferences, donate and bid on items in the silent auction and buy t-shirts, bracelets, etc. Use the free RoundUp app to benefit Clerk education. Leave a lasting gift for Clerk education through the Foundation legacy program.

### Thank You for Your Support of Clerk Education

The Foundation Board extends thanks to everyone who supported the Foundation in 2020 in any manner. We also extend thanks to the IIMC Board and staff for their support. Last, but

certainly not least, I thank the Foundation Board members for their endless support of Clerk education through the donation of your time, money, travel expenses and knowledge.

I look forward to hearing from IIMC members, retirees and friends in 2021 when we work together to raise Clerk education dollars to unprecedented levels. Remember, when we all give a little, we all learn a lot!

Working for you,

Mary Lynne Stratta, MMC  
IIMC Foundation President

## Endowed Education Funds and Scholarships

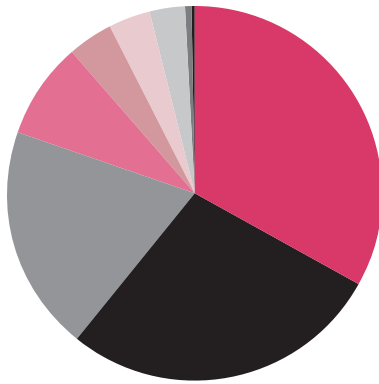
- A. Fleming Bell Education Fund
- American Legal Publishing Corporation Education Fund
- Anne Uecker Education Fund
- Barstow Family Education Fund
- Business Records Corporation Education Fund
- California City Clerks Education Fund
- Charles & Stephanie Kelly Endowment Fund
- Charlie Buttiglieri Education Fund
- Chris & Patrick Wilder Education Fund
- City Clerks of California Scholarship Fund (CA Clerks only)
- 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
- Mary Johnston Education Endowment (Ohio Clerks only)
- 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
- 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 Recordors
- Region IV Education Fund
- IIMC Region IV Education Fund
- Reynolds Miel Education Fund
- Robert T. Thorpe Scholarship Fund
- Robert W. Pritchard Education Fund
- Tak & Helen Kawagoe Education Fund

*An investment in Knowledge pays the best interest.*

Benjamin Franklin

## 2020 YEAR END CHARTS

### Income - 2020 Total Income \$144,856.95

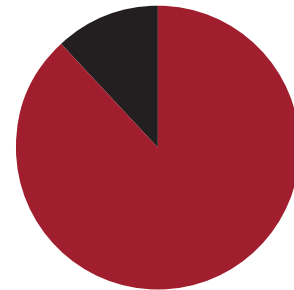


|   |       |             |
|---|-------|-------------|
| ■ Voluntary Contributions from IIMC members (33%) | ..... | \$48,040.00 |
| ■ Endowments (28%)                                | ..... | \$40,285.00 |
| ■ Society Donations (19%)                         | ..... | \$28,221.00 |
| ■ Misc Raffles (HI Trip, Conf Reg, Misc)(8%)      | ..... | \$11,860.00 |
| ■ Sponsorships from IIMC (4%)                     | ..... | \$5,611.70  |
| ■ 2020 Education Funds from IIMC (4%)             | ..... | \$5,277.00  |
| ■ Memorials & Tributes (3%)                       | ..... | \$4,645.00  |
| ■ Other (0.5%)                                    | ..... | \$742.25    |
| ■ Conference T-shirts (0.25%)                     | ..... | \$100.00    |
| ■ Conference Bracelets (0.25%)                    | ..... | \$75.00     |

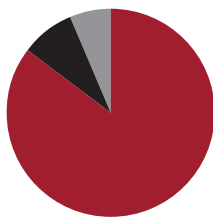
### Operating Expenses - 2020 Total Operating/Other Expenses \$69,217.63

|                                  |       |             |
|----------------------------------|-------|-------------|
| ■ Professional Fees (32%)        | ..... | \$22,091.00 |
| ■ Supplies/Printing/Postage (4%) | ..... | \$2,936.48  |
| (Includes SA/ Conf)              |       |             |

Actual operating expense to total revenue for the year s 15%



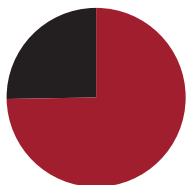
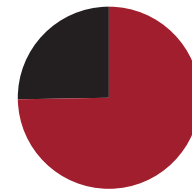
### Annual Contributions to IIMC Educational Programs Total \$44,190.15



|  |       |             |
|--|-------|-------------|
| ■ 2020 Education Funds to IIMC (55%)       | ..... | \$37,692.00 |
| ■ Unrestricted CMC & MMC Scholarships (5%) | ..... | \$3,733.15  |
| ■ Restricted CMC & MMC Scholarships (4%)   | ..... | \$2,765.00  |

### Endowment Funds

|                                  |       |                       |
|----------------------------------|-------|-----------------------|
| ■ Year End 2019 Unrestricted     | ..... | \$2,155,985.46        |
| ■ Year End 2019 Restricted       | ..... | \$728,775.59          |
| <b>Year End Total Value 2019</b> | ..... | <b>\$2,884,761.05</b> |



|                                  |       |                       |
|----------------------------------|-------|-----------------------|
| ■ Year End 2020 Unrestricted     | ..... | \$2,395,221.48        |
| ■ Year End 2020 Restricted       | ..... | \$809,451.25          |
| <b>Year End Total Value 2020</b> | ..... | <b>\$3,204,672.73</b> |

## 2020 FOUNDATION DONORS

### Shinners

(\$1,000 and above)

American Legal  
 Barstow, Dale  
 Brown, Buster  
 Buttiglieri, Vincent  
 Bollhauer, Ray  
 Cassler, Sharon  
 Engle, Colleen  
 Frommeyer, Rich  
 General Code  
 Granicus  
 Hammerstrom, Bev  
 Heupel, Ross  
 Hussey, Wayne  
 Johnston, Mary  
 Kayser, Mary  
 McDonough, Joe  
 McPherson, Lana  
 Miel, Vicky  
 Moore, Shari  
 MuniCode Team  
 Nicol, Colleen  
 Ohio Municipal Clerks Assn.  
 Oregon Assn. Municipal Recordors  
 Pavlica, Andrew  
 Rodriguez, Norma  
 Schneider, Roxanne  
 Stratta, Mary Lynne  
 Tinnin, James  
 University of Nebraska at Omaha  
 Wolf, Stephen

### Schwarzkopf

(\$500 to \$999)

Civic Plus  
 Davis, Tracy  
 IIMC  
 Kofile

Mangen, Debra  
 MCCi  
 Schwarzkopf, Lyall  
 Shalby, Chris  
 SHURE  
 SMARSH  
 Smithers, Kristie  
 Susen, Allan  
 Texas Municipal Clerks Assn.

### Turtle

(\$250 to \$499)

Cirtin, Brenda  
 Corbitt, Susan  
 Dornan, Kathryn  
 Hess, Mary Ann  
 Hudson, Teresa  
 Kelly, Stephanie  
 Moe, Marie  
 Pitman, Camilla  
 Ruch, Brian  
 Smith, Pamela  
 Wilder, Christina

### New Century

(\$100 to \$249)

Almy, Janice  
 Benson, Kimberly  
 Burke, Elizabeth  
 Burton, Melissa  
 Daudt, Janis  
 Deford, Connie  
 DiBlasi, Ashley  
 Dobratz, Jilline  
 Feibel, Teri  
 Fletcher, Jennifer  
 Goodall, Jannette  
 Hennigan, LaVette Elizabeth  
 Jacobs, Carol

Johnston, Lisa  
 Kamka, Julie  
 Lanter, Angela  
 Michanowicz, Dawn  
 Moe, Sara  
 Niethammer, Emmie  
 Novy, Betty  
 Ortiz, Susan  
 Post, Ruth  
 Quinn, Janita  
 Rappe, Linda  
 Rodgers, Anthony  
 Roth, Debby  
 Schwarzkopf, Leigh Ann  
 Selleck, Shawn  
 Small, Melissa  
 Tokar, Charles  
 Villescas, Cynthia  
 Walker, Kathy  
 Whitbey, Diane  
 Young, Kathryn

### Patron

(\$50 to \$99)

Anderberg, Karri  
 Barber, Douglass  
 Basham, Lora  
 Blackard, Barbara  
 Bobrowski, Michele  
 Burton, Toni  
 Campbell, Barbara  
 Carlson, Beth  
 Cobb, Recarda  
 Collins, Dawn  
 Cowley, Carol  
 Dispense, Allison  
 Dispoto, Barbara  
 Fortenberry, Servia  
 Fruehling, Kellie  
 Fuller, Debra

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# TRIBUTES

Foundation Tributes/Honor Your Mentor  
 The following is a list of donations made to the Foundation  
 in recognition of the following individuals

**Tribute to Mary Johnston**

Charles Tokar

**Tribute to Lana McPherson**

Charles Tokar  
 Camilla Pitman

**Tribute to Amy Holt, Ph.D.**

Janita Quinn

**Tribute to Dale Barstow**

Emmie Niethammer

**Honor Your Mentor - Mary Lynne Stratta**

Sharon Cassler  
 Lana McPherson

**Honor Your Mentor - Tom Roberts**

Lana McPherson

**Honor Your Mentor - Kittie Kopitke**

Lana McPherson

**Honor Your Mentor - Charles Tokar**

Lana McPherson

**Honor Your Mentor - Sharon Cassler**

Lana McPherson

**Honor Your Mentor - Betty Brown**

Mary Lynne Stratta

**Honor Your Mentor - Norma Rodriguez**

Mary Lynne Stratta

**Honor Your Mentor - Ranette Larsen**

Mary Lynne Stratta

**Honor Your Mentor - Mary Haynes**

Mary Lynne Stratta

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## 2020 Foundation Donors

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Furbee, Christina

Givens, Bridget

Gladwell, Diane

Godwin, Alita

Gooderham, Renee

Grinstead, Samantha

Harris, Angela

Hediger, Lana

Heinz, Jamie

Heritage, Valerie

Hyde, Mary Beth

Jermann, Debra

Johnson, Angela

Johnston, Stacey

Kennedy, Natasha

Kohler, Andrea

Lacey, Tonya

Lewis, Jami

McCullough, Keshia

Mendoza, Monica

Mitchell, Victoria

Morris, Travis

Petronio, Sheri

Pollard, Cindy

Pomroy, Gail

Prado, Roseann

Pritchard, Robert

Reese, LaRette

Robinson, Jim

Robinson, Karen

Rombouts, Marie

Salazar, Shelly

Schanz, Melissa

Sciacca, Janell

Sies, Melissa

Taylor, Tammy

Tellier, Becky

Van Blargan, Clara

Verrastro, Leonard

Weber, Marie

Westbrook, Sherri

Wilkerson, Stacy

Williams-Hinton, Laura

Williams, Athina

Williams, Dana

Winkle, Angela

Wiseman, Isaac



# IIMC FOUNDATION MEMORIALS

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



**On behalf of Anita Carlton**

*IIMC*

**On behalf of Arlene Cuevas**

*Colleen Nicol*

**On behalf of Carol Borges**

*Art Comacho*

**On behalf of Dave Fells**

*Colleen Nicol*

**On behalf of Devin Johns**

*Colleen Nicol*

**On behalf of Donald Pingleton**

*IIMC*

**On behalf of Emily Moore**

*Vincent Buttiglieri*

*Sharon Cassler*

*Tracy Davis*

*Kathryn Dornan*

*Bev Hammerstrom*

*IIMC*

*Colleen Nicol*

*Roxanne Schneider*

*Mary Lynne Stratta*

**On behalf of Eri Arduini**

*Lana Hediger*

**On behalf of Frank Adshead, Ph. D.**

*Brenda Cirtin*

*IIMC*

**On behalf of Fred Moss**

*Melissa Burton*

**On behalf of Joyce Kaye Willocks**

*Roxanne Schneider*

*Sharon Cassler*

*IIMC*

*Colleen Nicol*

**On behalf of Helen Kawagoe**

*Bev Hammerstrom*

*Robert Pritchard*

*Mary Lynne Stratta*

*IIMC*

*Colleen Nicol*

*Norma Rodriguez*

**On behalf of James Eric Haddock**

*Melissa Burton*

**On behalf of Judy Jenkins**

*Colleen Nicol*

**On behalf of Glid Galloway**

*Mary Lynne Stratta*

**On behalf of Margaret "Peg" Griffith**

*Sharon Cassler*

*Robert Pritchard*

*IIMC*

*Colleen Nicol*

*Norma Rodriguez*

**On behalf of Margery Price**

*IIMC*

*Colleen Nicol*

*Norma Rodriguez*

**On Behalf of Mary Phyllis Biocca**

*Sharon Cassler*

*IIMC*

*Roxanne Schneider*

**On behalf of Richard Alan Field**

*IIMC*

**On behalf of Sally Moe**

*IIMC*

*Roxanne Schneider*

**On behalf of Sean Hudson**

*Teresa Hudson*

**On behalf of Tamara Greenough**

*Colleen Nicol*

**On behalf of Theresa Russell**

*Brandy Dalton*

**On behalf of Tom Hart**

*Colleen Nicol*