

# 2019

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.



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Mary Lynne Stratta, MMC  
Bryan, TX



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Omaha, NE



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Kristie Smithers, MMC  
Wasilla, AK



Lana McPherson, MMC  
De Soto, KS

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Sharon Cassler, MMC  
Cambridge, OH



Wayne Hussey  
Bradenton, FL



Shari Moore, MMC  
St. Paul, MN



Chris G. Shalby  
IIMC Executive Director  
Rancho Cucamonga, CA

*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 action; 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,

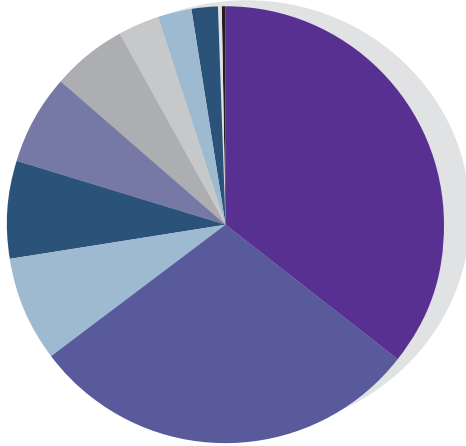
Mary Lynne Stratta, MMC  
IIMC Foundation President



# 2019 YEAR END CHARTS



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

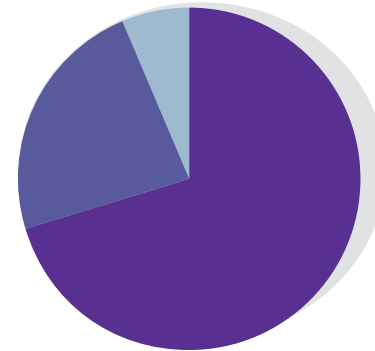


■ Endowments .....	\$65,916
■ Voluntary Contributions from IIMC members .....	\$53,645
■ Society Donations.....	\$14,251
■ Misc Raffles (HI Trip, Conf Reg, Misc) .....	\$13,450
■ Sponsorships from IIMC.....	\$12,321
■ Silent Auction .....	\$10,278
■ Conference T-shirts.....	\$5,300
■ Memorials & Tributes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

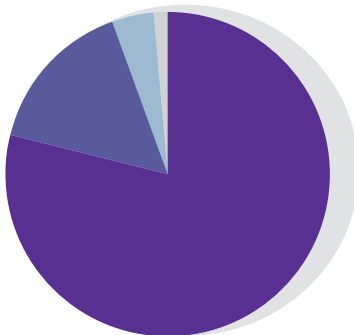
## Operating Expenses - 2019

### Total Operating/Other Expenses \$88,560

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



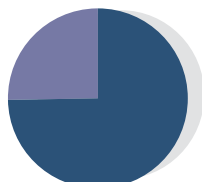
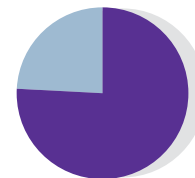
## Annual Contributions to IIMC Educational Programs Total \$65,079



■ 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>	<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>



## 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 Recordors
- 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

### Shiners

(\$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, Vicky  
 Moore, Shari  
 Municipal Clerks Assoc of NJ  
 Municipal Code Corporation  
 Nicol, Colleen  
 Oregon Assoc Municipal Recordors  
 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  
 Granicus  
 Henley, Melissa  
 Hussey, Wayne  
 IIMC  
 Jacobs, Carol  
 Johnston, Mary  
 Kofile  
 Kopitke, Kittie  
 Mangen, Debra  
 MCCi  
 New Mexico Municipal League  
 OnBase by Hyland  
 Romanowski, Renee  
 SHURE  
 SMARSH  
 Susen, Allan  
 Texas Municipal Clerks

**Turtle**  
 (\$250 to \$499)

Edwards, RaNae  
 Etzel, Audra  
 Fletcher, Jan  
 Hudson, Teresa  
 Iowa MFO Assn  
 Minnesota MCFOA  
 Mississippi Clerks Assn  
 Ohio Municipal Clerks Assn  
 Pitman, Camilla  
 Powell, Millie  
 Shalby, Chris  
 Tokar, Charles  
 Volk, Debby  
 Wilder, Christina  
 Wisconsin Clerks/Treas & FOA

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

Abrahamson, Dawn  
 Atoruk, Stella  
 Black, Bobbie  
 Chittick, Marilyn  
 Cirtin, Brenda  
 Daudt, Janis  
 Deford, Connie  
 Dornan, Kathryn  
 Estes, Dawn  
 Gabel, Wanda  
 Gore, Eileen  
 Haynes, Rebecca  
 Hess, Mary Ann  
 Hiott, Susan  
 ibml  
 Jones, Terri  
 City Clerks and Finance Officers Assn. of Kansas  
 Kentucky Municipal Clerks  
 Larsen, Linda R  
 Lemoine, Marc  
 Maryland Municipal Clerks Assn  
 O'Connor, Marcella  
 Ragona, JoAnne  
 Reese, Dyanne  
 Rekemeyer, Deanna  
 Roberts, Thomas  
 Rozman, Kerry L.  
 Ruch, Brian  
 Smithers, Kristie  
 Tripp, Terry  
 Whitbey, Diane

**Patron**  
 (\$50 to \$99)

Ahart, Brian  
 Almy, Janice  
 Anderson, Leisa

Arkansas City Clerks, Rec, Treas  
 Barnes, Emma  
 Bavin, Megan  
 Benson, Kimberly  
 Birdyshaw, Sandra  
 Blackard, Barbara  
 Bobrowski, Michele  
 Bocook, Janice  
 Borchers, Laura  
 Bracamontes, June  
 Carig-Bragg, Ellen  
 Brooks, Erika  
 Brown, Chenay  
 Bruckman, Sara  
 Bryant, Sandra  
 Buck, Karen  
 Burroughes, Claire  
 Butler, Eliza  
 Cain, Tracey  
 Campos, Amanda  
 Carrara, Stephanie  
 Choate, Peggy  
 Clark, Cathy  
 Cobb, Recarda  
 Corder, Alicia  
 Corley, Kim  
 Cova, JoAnn  
 Crook, Melinda  
 Crouch, Christine  
 Crough, Robin  
 Cunningham, Andrea  
 Cure, Sherry  
 Darany, George  
 Devine, Irma  
 Dillon, Rebecca  
 Elford, Faith  
 Enterkin, Janise  
 Ewald, Rayla Sue  
 Falowski, Amy  
 Fink, Mia  
 Forgey, Yael  
 Fortenberry, Servia

Galloway, Diana  
 Garcia, Christina  
 Garner, Schenika  
 Geffert, Adam  
 Geletei, Paula  
 Giercyk, Teri  
 Goering, William  
 Gray, Angelica  
 Gutierrez-Robles, Julie  
 Hazelwood, Geri  
 Hensen, Lori  
 Hilford, Bonnie  
 Hillegeist, Heather  
 Hinrichs, Kimberly  
 Hrasky, Ronda  
 Huber, Gay  
 Ingold, Helen  
 Jackson, Suzanne  
 Johnson, Carrie  
 Johnson, Damita  
 Johnston, Denise  
 Johnston, Lisa  
 Jones, Cynthia  
 Jones, Dale  
 Jones, Katherine  
 Karr, Marilyn  
 Kennedy, Natasha  
 King, Sharon  
 Kinville, Donna  
 Koger, Jim  
 Krusznis, Annemarie  
 Legacy, Tammy  
 Leslie, Pam  
 LeViner, Janet  
 Lewis, Jami  
 Lewis, Patti  
 Lycette, Twila  
 Mabry, Amanda  
 Mandley, Danielle  
 Martin, Carin  
 Martinez-Gomez, Nora  
 McElyea, Lisa  
 Mericle, Carol



## IIMC Foundation Memorials

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

### **On behalf of Alberta Schrock**

*Vincent Buttiglieri  
Sharon Cassler  
IIMC  
Colleen Nicol  
Roxanne Schneider*

### **On behalf of Amy Kesanen**

*Bev Hammerstrom  
IIMC  
Colleen Nicol  
Roxanne Schneider*

### **On behalf of Cathy Wojtkiewicz**

*Sharon Cassler*

### **On behalf of Charles Kelly**

*Dale Barstow*

### **On behalf of Curtis Olstad**

*IIMC  
Roxanne Schneider*

### **On behalf of Don Conlee, Jr.**

*Mary Lynne Stratta*

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

*Dale Barstow  
Sharon Cassler  
IIMC  
Colleen Nicol  
Thomas Roberts  
Chris Shalby  
Mary Lynne Stratta  
Joann Tilton  
Charles Tokar*

### **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*

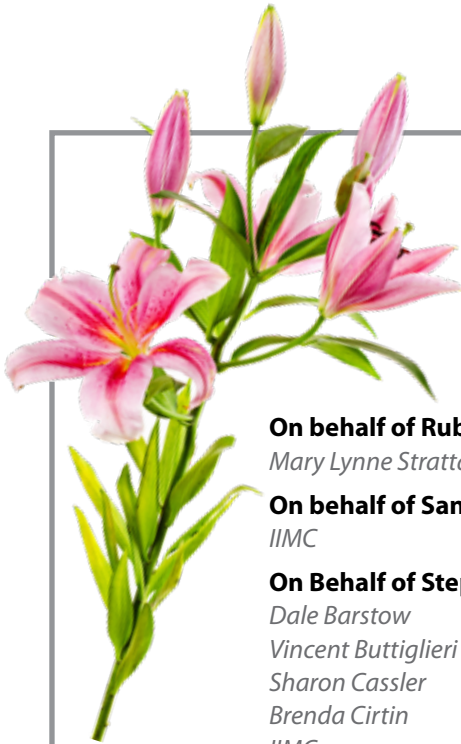
### **On behalf of Robert James Gragg**

*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. Danyielle
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	Visosky, 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	