2019
IEA Annual Report

Information as of our fiscal year-end,
December 31, 2019
The IEA Board of Directors is pleased to present the Annual Report for 2019.

In 2019 we celebrate our 25th year as an organization. Our Global Conference theme, Foundations for the Future, encapsulates our results for the year as well.

We are pleased to report an outstanding year of results, including significant achievements in several key areas:

- Membership has increased and been made more accessible for Affiliates and their members.
- The Accreditation program has been enhanced and seen increased participation.
- Scholarship and other donations increased substantially.
- And we have continued our focus on ways to become a more truly international organization.

We are proud of what we’ve accomplished together as a community and look forward to building on this foundation in years to come!

Carla Smith & Jan Shegda
Co-Presidents of the IEA Global Board
2019 ACHIEVEMENTS

25th Anniversary Celebration and Global Conference

2019’s global conference in Oakland, California was a lively gathering of 473 participants from 23 countries. Our theme was Foundations for the Future and celebrated our rich history and bright future as an Enneagram community. We recognized our Founders, as well as all past and present Board members, Presidents and volunteers. Sadly, Claudio Naranjo, our planned endnote speaker, passed away just before the conference but we were able to pay tribute to him through a video compilation of his teachings.

Membership

Membership increased across all categories throughout 2019 reflecting the additional value of year-around benefits added in recent years such as the Member Library containing prior conference recordings and Enneagram Journal articles. New discounted membership categories were also added to make it more affordable for Affiliate Members to join IEA global.

Accreditation Program

The IEA Accreditation program celebrated its 10th year in 2019. During 2019, the Accredited Professional Requirements were enhanced to ensure the continued highest quality of training and professional experience, a new category of Accredited Professional with Distinction was added to recognize our most experienced Accredited Professionals, and the definitions of Accredited Training Programs and Accredited Enneagram Schools were substantially revised. In addition, we began a 2-year transition of the Accredited Professionals previously accredited through IEA Spain to IEA global.

Scholarship Program

The Scholarship program was in its third year in 2019 and raised over $40,000, more than three times the amount raised in 2018. 40 applications were received for scholarships to attend the 2019 global conference in Oakland and a total of $24,840 was awarded. An additional $16,000 was set aside for scholarship awards to attend regional conferences sponsored by IEA Affiliates and Chapters and other workshops sponsored by the IEA in 2020. Full and partial awards are determined by the Board’s Scholarship Committee using criteria related to diversity, the level of need and the potential impact of the award. The amount and nature of awards varied and included $10,915 for conference registrations, $1,180 for IEA memberships in various categories and $12,280 for travel and other related expenses. The 27 award recipients were from 6 different countries.

International Outreach

In 2019, the IEA continued its efforts to become a more truly global organization. We awarded full or partial conference scholarships to individuals from 5 countries other than the United States. We also implemented discounted annual Affiliate fees and discounted Professional Membership Dues and Accreditation fees to make participation more affordable for Affiliates and their members in other countries based on the average per capita household income in the country. For 2020 the IEA had planned to support regional conferences in Cairo, Egypt (February), Bogota, Colombia (May), Chicago, Illinois (July) and Stockholm, Sweden (September) instead of holding a global conference in the United States. Unfortunately the Coronavirus pandemic has altered many of these plans.
Overview of Financial Results (and year over year comparison):

Our Net Income for the year of $223,935 and Net Operating Income of $89,739 was significantly higher than the $1,200 Net Income in 2018 as a result of significant increases in Income in several categories. In addition, Expenses (other than conference and scholarship grants discussed below) remained relatively flat. Increases in Net Income and Net Operating Income resulted primarily from:

**INCOME AND EXPENSES**

<table>
<thead>
<tr>
<th>Total Income:</th>
<th>($586,272)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Expenses:</td>
<td>($362,287)</td>
</tr>
<tr>
<td>Total Net Income:</td>
<td>($223,935)</td>
</tr>
<tr>
<td>Total Net Operating Income*:</td>
<td>($89,739*)</td>
</tr>
</tbody>
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*Excludes all scholarship donations and a large special purpose bequest from Income, and excludes scholarship grants from Expenses.

**Donations and Bequest**

The largest increase in Net Income relates to a significant increase in donations and a related change in accounting methods. The increase in donations included both a single large bequest for the specific purpose of enhancing our global outreach and accessibility and an increase in scholarship and other donations. These donations totaled $159,877 in 2019 and, as a result of the change in accounting methods, are now included in Income for the year. In 2019, scholarship grants of $24,425 were included in Expenses. Scholarship funds paid out in 2019 were funded in part by donations made for such purpose in 2018. Scholarship donations made during 2019 were either used in 2019 or set aside for grants to be made in 2020. Net Operating Income for 2019 reflects funds received from and used for general operations (including general unrestricted donations) and is comparable to 2018 Net Income. 2019 Net Operating Income excludes both the special purpose bequest and the scholarship donations and expenses.

**25th Anniversary Global Conference in Oakland, California**

In 2019 we experienced a 222% increase in net conference income over the prior year. Net conference income of $108,970 for 2019 compared to $49,044 for 2018 resulted from higher attendance levels along with effective expense management.

**Membership**

Membership income increased by 36% to $128,693 due to an increase in total memberships from 829 at the end of 2018 to 1,118 at the end of 2019.

**Accreditation Program**

Accreditation income increased by 39% to $29,435 primarily as a result of an increase in the number of Accredited Professionals from 213 in 2018 (including 44 accredited through IEA Spain) to 241 in 2019 (including 49 transitioned from IEA Spain to IEA global). The numbers of Accredited Training Programs and Accredited Enneagram Schools increased as well from 2018 to 2019 (from 18 to 19 and from 13 to 19, respectively).
INCOME AND EXPENSES

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INCOME AND EXPENSES

Conference Income
Conference Sponsorships & Scholarship Donations
Membership Dues
Accreditation Program
Marketing Programs (Professional Spotlights)

Conference Expenses
Office & Organizational Expenses
Board of Directors
Scholarship grants
Technology
Chapters & Affiliates

Conference Income: 45%
Conference Sponsorships & Scholarship Donations: 27%
Membership Dues: 17%
Accreditation Program: 5%
Marketing Programs (Professional Spotlights): 1%

Conference Expenses: 42%
Office & Organizational Expenses: 7%
Board of Directors: 30%
Scholarship grants: 17%
Technology: 3%
Chapters & Affiliates: 1%
PARTICIPATION IN IEA GLOBAL

Accreditation Program
Our accreditation program continues to grow

IEA Accredited Professionals
241*

IEA Accredited with Honor
8

IEA Accredited with Distinction
6

*Including 49 accredited by IEA Spain and transitioned to IEA global at year end

IEA Accredited Training Programs
19

IEA Accredited Schools
19
PARTICIPATION IN IEA GLOBAL

Membership

2018 Membership

Participating Memberships

- Participating: 211
- Senior: 150
- 30 & Under: 22
- Affiliate Participating: 6
- Professional: 434

2019 Membership

Participating Memberships

- Participating: 313
- Senior: 182
- 30 & Under: 48
- Affiliate Participating: 7
- Professional: 502

Professional Memberships

- Affiliate Professional: 59
- Lifetime: 7

35% increase over year-end 2018

2019 Total IEA Global Membership

1,118
National Affiliates

- ARGENTINA
- PRASIL
- CHINA
- COLOMBIA
- DENMARK
- EGYPT
- FINLAND
- FRANCE
- KOREA
- NETHERLANDS
- NORWAY
- PORTUGAL
- ESPAÑA
- SWEDEN

14 IEA Affiliates

U.S. Chapters

- COLORADO
- GEORGIA
- GREAT LAKES
- GREATER WASHINGTON DC
- MINNESOTA
- NORTHERN MINNESOTA

6 IEA U.S. Chapters
CURRENT GLOBAL BOARD

Carla Smith
Co-President
Chapter Lead, Accreditation Co-Lead

Jan Shegda
Co-President
Nominating Lead, External Relations Co-Lead

Montse Fernandez
Treasurer
Affiliates Co-Lead

Trent Thornley
Secretary
2021 Conference Co-Lead

Andrew Derkatch
Marketing Lead, Technology Co-Lead

Deborah Threadgill Egerton
Membership, Scholarships

Chris Heuertz
External Relations, Membership

Teresa McCloy
Social Media Lead

Brian Mitchell-Walker
2020 Events Lead, IEA Live Lead

Tina Tornell
Affiliates Co-Lead, Accreditation Co-Lead

Earl J. Wagner
Technology Lead

Bart Wendell
Scholarship Lead, External Relations Co-Lead

Tamer Zanaty
2021 Conference Co-Lead, Scholarships