The IEA Board of Directors is pleased to present the Annual Report for 2020.

2020 was a year unlike any other, both for the IEA and for individuals and organizations all around the world. After the triumph of our successful 25th anniversary celebration and global conference in 2019, we were poised to begin a new chapter. Transitioning to holding the global conference every other year to open space to feature regional conferences sponsored by our Affiliates and Chapters in the year between and for the IEA to host different kinds of events. The first of four planned regional conferences was held very successfully in Egypt in early February but then the pandemic hit, causing the rest of the plans for the year to be moved online, postponed or cancelled.

During 2020, we have collectively been reckoning with issues of equity, inclusion and social justice. Tragic events, increased polarization, and the disparate impacts of the pandemic, climate change, systemic racism and other large forces challenge our both our thinking and our institutions. Interest in and popularity of the Enneagram continues to grow. And with that, comes the risk of stereotyping, misunderstanding and misuse of the system we so value as a powerful tool for personal growth and connection.

Like many others, we and our community have found both challenges and gifts in this unusual time. We have missed seeing each other in person. And at the same time, we are delighted that more people all around the world have been able to participate in and contribute to online programs that we, our Chapters and Affiliates, and our Accredited Professionals have offered as the typical barriers of geography and cost were reduced. We’ve all learned a lot and are excited to see what the future now holds!

We are pleased to report that even with the challenges and changes of 2020, our membership has remained strong. Our accreditation program continues to grow and set a high bar for excellence and depth in teaching and using the Enneagram. And our community continues to become more diverse, welcoming and truly international.

We are proud of what we’ve accomplished together and look forward to continuing to build on this foundation!

Carla Smith &
Jan Shegda
Co-Presidents of the IEA Global Board
2020 was a year unlike any in the IEA’s history. Exploding interest in the Enneagram, the rapid development of online platforms and e-learning methods necessitated by the pandemic, and challenges posed by increased polarization and political upheaval has made the work we do more important than ever. With the goal of recognizing and promoting high quality and ethical teaching and use of the Enneagram and at the same time making our programs more accessible and affordable than ever, here are some of the achievements for the year that we are celebrating:

**April 2020 Panel Workshop on the Instinctual Subtypes**

This workshop brought together 4 of the top teachers in our IEA community who have done substantial work with the instincts and subtypes for a facilitated conversation on the commonalities and differences in the ways they understand and teach this important material. While originally planned as an in-person workshop, we needed to quickly pivot and convert it to an online event due to Covid shutdowns. With 370 attendees, the event was a big success! We thank our panelists (Beatrice Chestnut, Russ Hudson, Peter O’Hanrahan and Mario Sikora) and our facilitators (Leslie Hershberger and Curt Micka), administrator Sandy Hatmaker and the Board and staff for their flexibility and contributions to making the necessary shifts.

**Successful Regional Conferences**

We began 2020 anticipating 4 regional conferences in different parts of the world in lieu of a single global conference. The conference hosted by IEA Egypt in Cairo was held in early February and very well attended by presenters and registrants from around the world. By March, the pandemic required other plans to be changed. The conference co-hosted by the Great Lakes and Minnesota Chapters in the US was successfully moved online in July and was also very well attended. The Scandinavian Affiliates conference planned for Stockholm, Sweden was postponed to 2022 and other events were cancelled.

**Pandemic-related Community Support**

In the early months of the pandemic the IEA offered support to our extended Enneagram community by publicizing free Enneagram-related content offered by our Accredited Professionals and by hosting a free weekly online support and practice group. In addition, we modified the requirements for accreditation to include quality online interactive trainings and workshops and extended the deadlines for accredited professionals and programs to renew for the year as they revised their offerings and adjusted to the new environment. As we all gained experience with e-learning, we made permanent changes to our accreditation requirements recognizing that high quality online and hybrid programs will continue to be offered even after the pandemic subsides.

**Update of Ethics Policies and Adoption of Formal Complaint Process**

Ethical behavior and treatment of others in the teaching and use of the Enneagram and within the IEA community has long been one of our core values. The Ethical Guidelines which all members affirm when they join and the Code of Ethical Conduct that all IEA Accredited Professionals, Training Programs and Schools must adhere to and share with their students set out our collective commitments and expectations for ethical conduct. In 2020 we revised and updated the Ethical Guidelines and Code of Conduct to reflect our current standards. We also adopted and publicized a formal complaint process and created an Ethical Conduct Review Committee to investigate complaints received and recommend appropriate actions in response.
Overview of Financial Results:
Even before the adjustments required in response to the global Coronavirus pandemic, 2020 represented a significant operational change for the IEA. We shifted from hosting an annual global conference to alternating global conference years with years for regional conferences and other events. Our Net Income for the year of $17,131, while lower than our Net Operating Income in 2019, represented a significant achievement for the organization given all of the changes. Significant contributing factors were:

**Income and Expenses**

<table>
<thead>
<tr>
<th>Total Income:</th>
<th>$186,809</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Expenses:</td>
<td>$169,590.80</td>
</tr>
<tr>
<td>Total Net Income:</td>
<td>$17,218.50</td>
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</tbody>
</table>

**Income from events**
In 2020 the IEA received income of $33,738 from events it sponsored and from profit sharing payments received from regional conferences sponsored by IEA Chapters and Affiliates. The events sponsored by IEA global included a panel workshop originally scheduled to occur in person but instead held online in April. A second in-person workshop had been planned but was cancelled resulting in certain cancellation costs. In addition, the monthly IEA Live online presentations initiated as a follow-up to the 2019 conference were opened to additional registrants beyond 2019 conference attendees. continued growth in the Accreditation program, and the reduction in travel and other expenses resulting from the cancellation of a planned in-person Board meeting.

**Accreditation program continued growth**
The IEA’s accreditation program has also continued to grow, ending the year with over 260 Accredited Professionals (including 8 with Honor and 13 with Distinction), 76 Accredited Training Programs and 22 Accredited Enneagram Schools. Reduced professional membership dues and accreditation fees were also adopted for members of our international Affiliates to adjust for different economic conditions in different countries. Accreditation program fees contributed $19,450 of income in 2020.

**Membership remained strong**
In the past, membership in IEA global was closely tied to conference attendance. We have introduced a number of new Membership benefits over the last several years, as well as reduced membership dues rates for younger people and members of our international Affiliates in recognition of the differing economic circumstances in various countries around the world. As a result, membership remained strong in 2020 with over 1,000 members as of year-end and income from membership dues of $109,103, even without hosting a global conference.

**Spotlight advertising program**
The redesigned Spotlight advertising program offered to our Professional Members has been well received and contributed $11,975 to 2020 income. Professional Members may purchase either email and online promotions or online-only ads.

**Reduced administrative expenses**
The final significant factor contributing to our positive net income for 2020 was the significant reduction in expenses that resulted from moving events online and only holding one in-person board meeting during the year due to Covid-related travel and other restrictions.
INCOME AND EXPENSES

Income:
- Membership Dues: 58%
- Office & Organizational Expenses: 12%
- Accreditation Program: 12%
- Spotlight Ads: 11%
- Affiliate Fees: 6%
- Contributions/Donations: 3%

Expenses:
- Office & Organizational Expenses: 61%
- Events Expenses: 11%
- Technology: 12%
- Board of Directors: 12%
- Scholarship Grants: 3%
- Chapters & Affiliates: 1%
PARTICIPATION IN IEA GLOBAL

Accreditation Program

Our accreditation program continues to grow

IEA Accredited Professionals 239
IEA Accredited with Honor 8
IEA Accredited with Distinction 13
IEA Accredited Training Programs 76
IEA Accredited Schools 22
## Membership

### 2019 Membership

<table>
<thead>
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<th>Category</th>
<th>2019 Membership</th>
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<tr>
<td>Senior</td>
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<tr>
<td>30 &amp; Under</td>
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<td>Affiliate Participating</td>
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<tr>
<td>Professional</td>
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<tr>
<td>Affiliate Professional</td>
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<tr>
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### 2020 Total IEA Global Membership

1,001
National Affiliates

ARGENTINA
INTERNATIONAL ENNEAGRAM ASSOCIATION

PRASIL
INTERNATIONAL ENNEAGRAM ASSOCIATION

CHINA
INTERNATIONAL ENNEAGRAM ASSOCIATION

COLOMBIA
INTERNATIONAL ENNEAGRAM ASSOCIATION

DENMARK
INTERNATIONAL ENNEAGRAM ASSOCIATION

EGYPT
INTERNATIONAL ENNEAGRAM ASSOCIATION

FINLAND
INTERNATIONAL ENNEAGRAM ASSOCIATION

FRANCE
INTERNATIONAL ENNEAGRAM ASSOCIATION

KOREA
INTERNATIONAL ENNEAGRAM ASSOCIATION

NETHERLANDS
INTERNATIONAL ENNEAGRAM ASSOCIATION

NORWAY
INTERNATIONAL ENNEAGRAM ASSOCIATION

PORTUGAL
INTERNATIONAL ENNEAGRAM ASSOCIATION

ESPAÑA
INTERNATIONAL ENNEAGRAM ASSOCIATION

SWEDEN
INTERNATIONAL ENNEAGRAM ASSOCIATION

14 IEA Affiliates

U.S. Chapters

COLORADO
INTERNATIONAL ENNEAGRAM ASSOCIATION

GEORGIA
INTERNATIONAL ENNEAGRAM ASSOCIATION

GREAT LAKES
INTERNATIONAL ENNEAGRAM ASSOCIATION

GREATER WASHINGTON DC
INTERNATIONAL ENNEAGRAM ASSOCIATION

MINNESOTA
INTERNATIONAL ENNEAGRAM ASSOCIATION

5 IEA U.S. Chapters
CURRENT GLOBAL BOARD (JUNE 2021)

Carla Smith
Co-President
US Chapters Chair, Accreditation Chair
Maple Plain, MN USA

Jan Shegda
Co-President
Nominating Chair, Events Chair, External Relations Co-Chair
Los Angeles, CA USA

Montse Fernandez
Treasurer
Affiliates Co-Chair
Barcelona, Spain

Talía Guerrero González
Insights Chair, Languages Chair
Mexico City, Mexico

Stephanie Davis
Social Media Chair, Communications Chair
Montreal, QC Canada

Chloé Keric-Eli
Affiliates Co-Chair, Diversity, Equity & Inclusion Co-Chair
San Diego, CA USA

Trent Thornley
Secretary
2021 Conference Co-Chair
Montréal, QC Canada

Milton C. Stewart
Board Member
Memphis, TN USA

Andrew Derkatch
Graphic Design + Branding, Technology & Nine Points Chair
Sydney, NSW Australia

Deborah Threadgill Egerton
Diversity, Equity & Inclusion Co-Chair, IEA Enneagroups Co-Chair
Fresno, CA USA

Annabella Al-Nafusi
Board Member
Copenhagen, Denmark

Tamer Zanaty
2021 Conference Co-Chair
Cairo, Egypt

Tom Johansen
IEA Enneagroups Chair
Oslo, Norway

Matias Maceira
Board Member
Cordoba, Argentina

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