



International
ENNEAGRAM
Association

*Creating spaces to learn and connect
through the Enneagram*

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 relating 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.

INCOME AND EXPENSES

Total Income:

\$586,272

Total Expenses:

\$362,287

Total Net Income:

\$223,935

Total Net Operating Income*:

\$89,739*

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:

*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.

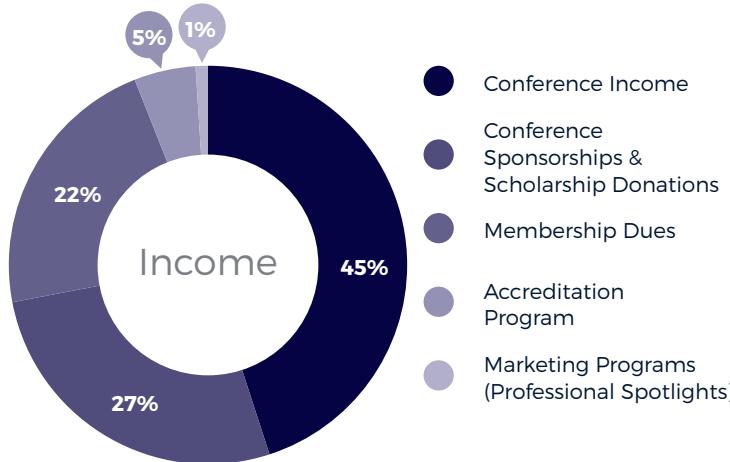
Membership

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.

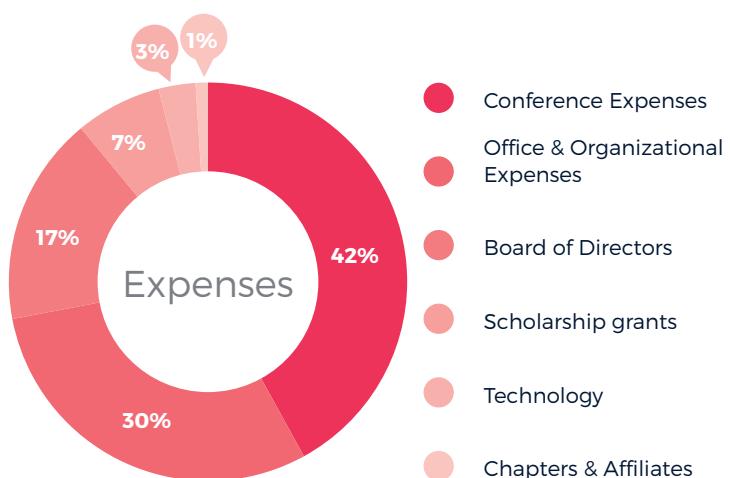
Accreditation Program

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).

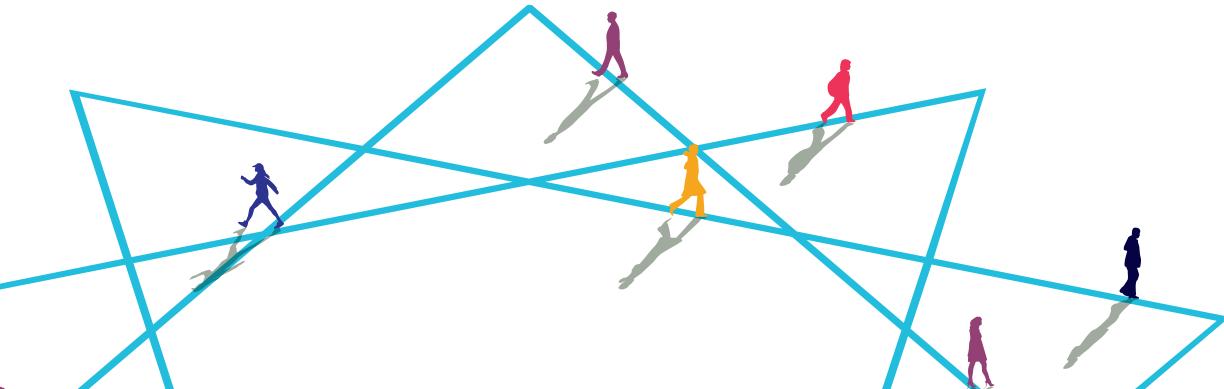
INCOME AND EXPENSES



- 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



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



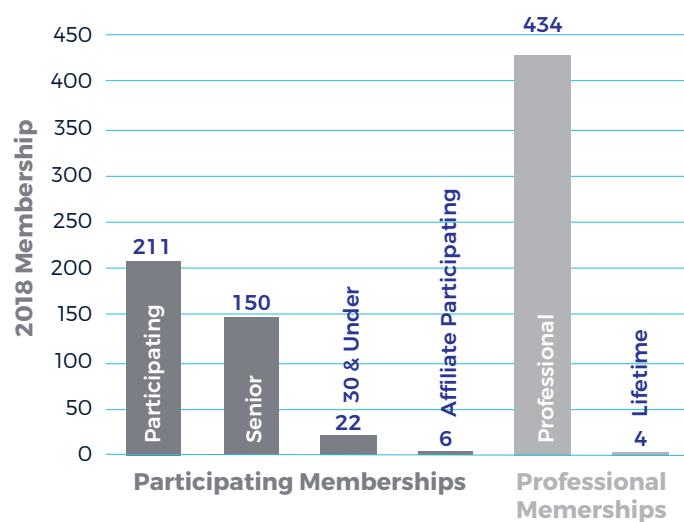
IEA Accredited
Schools

19

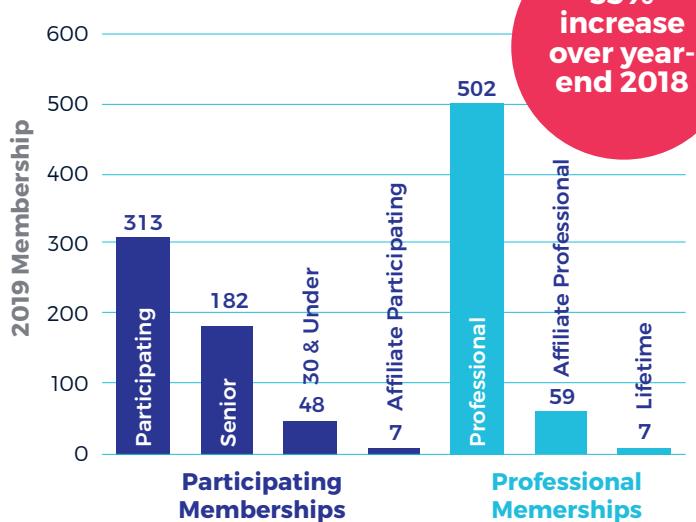
PARTICIPATION IN IEA GLOBAL

Membership

2018 Membership

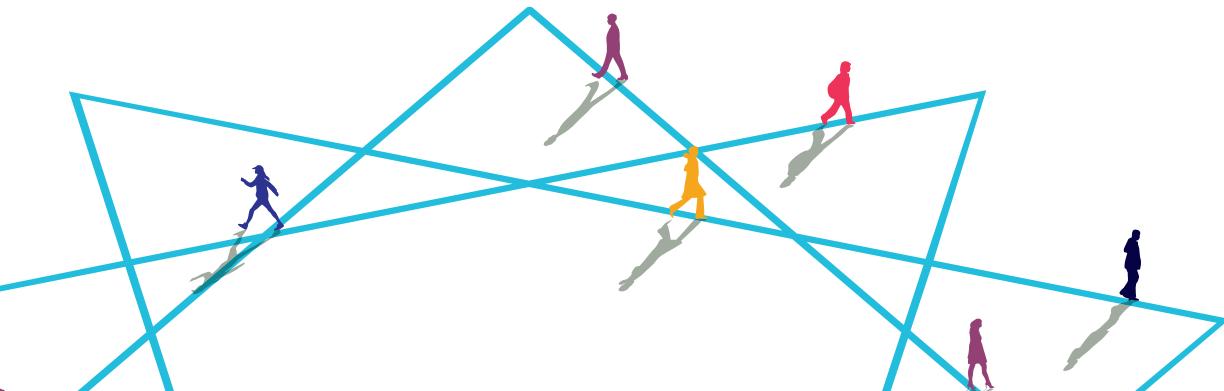


2019 Membership



2019 Total IEA Global Membership

1,118





AFFILIATES AND CHAPTERS

National Affiliates



ARGENTINA
International
Enneagram Association



BRASIL
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

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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



NORTHERN MINNESOTA
International
Enneagram Association

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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

