

BETTER
TOGETHER



BETTER
FOREVER

2023 REPORT TO THE COMMUNITY

Dear Community Foundation Friends,

As I write this letter, I'm struck with an overwhelming feeling of gratitude. Reflecting upon all we have done in partnership with one another to make a difference in the ways that matter most to each of you, and the communities we love, fills me with immense pride and gratitude.

I'm grateful for each of you. I'm grateful for the ways in which you have made it a priority to give back and make our communities, state, country and world a better place. I'm grateful for how you have introduced loved ones to the joy of giving as we develop generations of givers called to invest where support is needed. I'm grateful for your eagerness to learn about the needs of our communities and how you can invest in sustainable change for our pressing challenges and emerging opportunities. I'm grateful for your thoughtful foresight as you plan today for the needs of tomorrow.



But most of all, I'm grateful that you continue to give where you live. The Community Foundation is committed to providing best-in-class charitable giving services alongside local expertise on community issues and personalized service that makes us *uniquely yours*. I recognize you choose to partner with the Community Foundation of Greater Des Moines to meet your giving goals. On behalf of our board and staff, thank you.

We are grateful that you call us your home for charitable giving, and in 2023 we look forward to welcoming you to our expanded physical home, the Community Foundation Campus and C3 Center. Opened in April 2023, the Campus and C3 Center provides an opportunity to expand beyond the walls of the Finkbine, our beloved Grand Avenue facility, and brings our mission to life in new ways. I hope you will stop in and visit to see connection and collaboration in action as we build community. Whether you join us for one of our many nonprofit trainings, engage in a DonorConnect session to learn about timely community topics, soak in the energy of a meeting of emerging community leaders, converge around the board room table for a community convening conversation, or take time for reflection in the Nature Sacred Contemplative Garden, we hope you will come on in. We would love to welcome you to your philanthropic home.



YOU have built the Community Foundation. YOU are building community. YOU make us better together.

Sincerely,

A handwritten signature in white ink that reads "Kristi Knous".

Kristi Knous, President



2022 AT A GLANCE

GRANTED



\$850,500

FROM THE BETTER
TOGETHER FUND

OVER \$67.6 MILLION

in **GRANTS** made from
charitable giving funds

ENGAGED



MORE THAN **560** INDIVIDUALS
THROUGH

**COMMUNITY FOUNDATION
TRAININGS & CONVERSATIONS**



\$108.1 MILLION

in **GIFTS** contributed to
charitable giving funds



Convened
groups
around
pressing
community
issues

OVER 400

individuals were educated
at **DonorConnect** events

46

Affiliate county
and community
foundations were
served statewide

MANAGED



2,474

**CHARITABLE
GIVING FUNDS**

\$815,778,987 MILLION

in **ASSETS** under administration

81

**Charitable
Investment
Partners** helped to
grow their clients'
charitable assets

31

Organizations were provided
administrative support through
Nonprofit Accounting Services

3,530

charities supported from
charitable giving **FUNDS**

Established **For Impact Leaders**
to develop the next generation of
nonprofit staff leadership

“

WE BELIEVE IN DOING WHATEVER YOU CAN TO HELP OTHERS. THE COMMUNITY FOUNDATION MADE IT EASY FOR US TO GIVE BACK WITH THE TOOLS WE ALREADY HAD.”

MINOO & RICK SPELLERBERG

LAYING THE FOUNDATION

Minoo and Rick Spellerberg believe you always have something to give, but when the couple’s daughter-in-law, Jesse, was diagnosed with brain cancer, the power of community and generosity became more apparent than ever to the Spellerberg family. “As Jesse battled cancer, we were surrounded by everyone who wanted to help; we weren’t alone,” shared Minoo.

After a two-year battle, Jesse passed away in 2020 leaving behind her husband, Mosa, and their two young sons. As the family grieved the devastating loss, they considered how they could honor Jesse’s legacy.

Minoo soon realized the foundation had already been laid. “Prior to the diagnosis, Jesse and Mosa had begun building their family home next to our house here in Prole. Mosa no longer wanted to call the house home, and we knew it had an even greater purpose,” said Minoo.

The Spellerbergs along with Jesse’s mother, Beth Johnston, began plans to turn the home into the Jesse J. Sanctuary: A hideaway amongst nature for cancer patients and their families to stay free of charge. “Giving was a huge part of who Jesse was. We know she would be proud,” shared Beth.

As the Jesse J. Sanctuary came to life, the Spellerbergs found another way to grow their giving using an asset they already held. The Spellerbergs made a gift of stock to open a charitable giving fund at the Community Foundation. It provided a tax-wise way for the couple to support the Sanctuary and other causes they care about into the future.

“When we found out we could give stock to support our giving through the Community Foundation, it just made sense,” shared Rick. “Working with the Community Foundation to facilitate the gift was simple,” added Minoo. “We want to be sure we’re doing everything we can to focus on what matters most – helping those facing what our son and daughter-in-law went through. We want to show up for others as so many have shown up for us.”

photo: Minoo and Rick Spellerberg honor their daughter-in-law at the Jesse J. Sanctuary.



LISTEN TO LEAD



“

INVESTMENTS IN NEIGHBORHOODS IN THE HEART OF DES MOINES WILL CATALYZE SYSTEMIC CHANGE AND POSITIVELY IMPACT OUR COMMUNITY FOR GENERATIONS. WITH EVERYTHING OUR NEIGHBORS NEED TO SUCCEED IN ONE PLACE, PROJECTS THIS BOLD AND UNIQUE ARE NOT POSSIBLE WITHOUT THE SUPPORT OF PARTNERS LIKE THE COMMUNITY FOUNDATION.”

MARQUAS ASHWORTH

Director, Center @ Sixth

As the Des Moines Parks and Recreation team eyed the development of a community recreation center to serve all who call Des Moines' north side home, they knew there was no better place to start than with the north side neighbors.

“We canvassed the neighborhoods and filled an auditorium with residents who were able to tell us exactly what they needed,” shared Ben Page, Des Moines Parks and Recreation director. “We learned they needed a space not just for athletic recreation and activities, but a space for the community to connect, to come together, to learn.”

From the voices of those who will use the facility, plans for an innovative and inclusive north side community recreation center were born. The newly named Reichardt Community Recreation Center is one of four projects in Des Moines' north side and 6th Avenue Corridor neighborhoods to receive Community Foundation Leadership Grant support last year.

“By investing in projects like these, we are activating the Community Foundation's mantra of better together,” shared Angie Dethlefs-Trettin, chief community impact officer at the Community Foundation. “We are listening, learning and investing in our neighbors to bring about collective community transformation.”

A few blocks east of the future Reichardt Community Recreation Center site lies the 6th Avenue Corridor, a neighborhood rich in art, culture, flavors and history. It's also home to the 6th Avenue Flats: a first-of-its-kind initiative in Central Iowa that received Leadership Grant support to embed mental health services into an affordable housing setting.

Up the street, the 12,000 square foot Center @ Sixth facility is being developed to serve small business owners through a Black and Brown main street business incubator supported by the Community Foundation. A Leadership Grant also supported Des Moines Area Transit (DART) in piloting a new on-demand service in the neighborhood, allowing riders to book trips in advance.

“These projects were all brought to life through the voices of visionary neighbors who call the north side home,” said Angie. “The Community Foundation is honored to come alongside community members who are transforming their neighborhoods into the spaces they need, want and deserve.”

photo: Marquas Ashworth is one of many leaders committed to building community in Des Moines' north side neighborhoods.

“

WE WOULD ENCOURAGE OTHERS IN THE COMMUNITY TO UTILIZE THE COMMUNITY FOUNDATION TO BECOME MORE PHILANTHROPIC. IF YOU WANT TO HAVE A BIGGER IMPACT OR REALIZE GIVING GOALS, INVEST WITH THE COMMUNITY FOUNDATION.”

DR. MARY & SUKU RADIA

COMMUNITY CHAMPIONS

Dr. Mary and Suku Radia have lived their lives in service to the Greater Des Moines community. The couple has spent countless hours volunteering and advocating for area nonprofits, with their generous spirit extending to financial support. “I remember making my first contributions to the United Way of Central Iowa in 1975; I gave \$1 a week. As a young man, and with Mary still in school, that was a lot of money to us, but we wanted to start giving,” said Suku. Mary added, “As we became more involved in the community, Suku chaired the United Way campaign twice and visited every supported agency. When you have first-hand experience with local organizations, you want to invest in their success.”

Seeking opportunities to invest in the success of others today and in the future is important to the Radias and made partnering with the Community Foundation the perfect fit. In honor of Mary’s education and career at Des Moines University, the Radias wanted to make a gift of stock to support minority students. “As we considered this gift to DMU, I was told by a national provider the transaction would take 10 to 15 days. But because of the professional expertise of the Community Foundation and the valuable relationships staff has created with nonprofits, the Community Foundation facilitated the gift in three days. It leveraged opportune moments to sell the stock, thus maximizing our gift,” said Suku.

Additionally, the Radias established a charitable giving fund that endows their future giving to United Way and the Community Foundation to ensure their decades of support will continue for generations. “The Community Foundation has been a great vehicle for our giving. It offers a team of experts and tools that allows you to achieve your goals and objectives effectively,” said Mary. Suku added, “Since we opened our charitable giving fund in 2008, I have become an advocate for the organization. Thanks to its solid, balanced investment approach, we have given back more over time than we would have ever thought possible.”

photo: Dr. Mary and Suku Radia’s community support will continue for generations.



LEADING LOCALLY



“

AS A COMMUNITY FOUNDATION, WE HAVE THE TOOLS AND RESOURCES TO GET INTO THE COMMUNITY, IDENTIFY NEEDS AND THEN BRING PEOPLE AROUND THE TABLE TO FIND SOLUTIONS TO REALLY BIG ISSUES, LIKE THE CHILDCARE SHORTAGE.”

DARCY SWON

Development Director,
Enhance Hamilton County Foundation

Darcy Swon, Development Director at the Enhance Hamilton County Foundation (EHCF), an affiliate of the Community Foundation of Greater Des Moines, highlighted the importance of childcare in a single story. “A local business owner found the perfect candidate to fill a leadership position. The woman was excited about the offer but needed to find childcare. She called back a few days later and declined the offer because the waitlist for childcare was more than a year.”

A 2016 Community Needs Assessment identified inadequate availability of childcare as one of the barriers to economic development in Hamilton County. “The leadership of EHCF knew we needed to do something to help our county’s childcare challenge, but we didn’t know where to start. In early 2019, I attended the Community Foundation’s quarterly affiliate training featuring a keynote speaker from the Iowa Women’s Foundation. She agreed to come to Hamilton County and lead two workshops. What we learned in these sessions was shocking.” Childcare providers shared the inability to accommodate more children was caused by an inability to attract and retain the employees necessary to meet demand.

In 2021, the Hamilton County Supervisors assembled a Childcare Coalition to take a deeper look into the economic impact that the lack of childcare was causing. They included the EHCF in these discussions and, as a result, the EHCF opened a Field of Interest Fund to encourage gifts to support childcare needs throughout the county. The Childcare Coalition began working with individuals and businesses to contribute to the fund that would provide financial bonuses to attract and retain employees.

The results of this partnership have been transformational. Darcy shares, “Since first making grants from the charitable giving fund in 2021, over 90 new childcare slots have been added to serve families in our community. We are making a difference.”

photo: Additional families can meet the critical need for childcare thanks to the Enhance Hamilton County Foundation.

PERFECT PAIRING



“

MARGARET SPENT MOST OF HER LIFE IN DES MOINES AND HER ENTIRE CAREER AS A WAITRESS AT NOAH'S ARK. WHEN WE TALKED ABOUT HOW TO LEAVE A LEGACY; I TOLD HER THERE WAS NO ONE BETTER THAN THE COMMUNITY FOUNDATION. MARGARET COULD USE A LOCAL PARTNER TO MAKE A LOCAL IMPACT.”

MIKE TRACY

Noah's Ark restaurant has long been a staple along Ingersoll Avenue in Des Moines. Just as iconic as the restaurant's pizza and calzones are its staff. Staff like Margaret Kitzrow. For over 45 years, Margaret was a waitress at Noah's, where she treasured her guests. Margaret's regulars knew she had a big heart and a listening ear, but they couldn't have imagined the plans Margaret was putting in place to leave a charitable legacy.

“I met Margaret in the early 1990s while I was working at a bank on Ingersoll Avenue,” shared Mike Tracy, a financial consultant with ONEWEALTH Personalized Wealth Management. “She would come in and make her deposits and withdrawals, but one day she was referred to me because she had saved some money she wanted to invest.” That first meeting became monthly meetings for the remainder of Margaret's life. Mike added, “Margaret was laser-focused on growing the \$10,000 she had saved into \$1 million. She would meet with me every month to check on her investments, but more importantly, she always checked in on me. Her first questions were always inquiring about my family and me. That is just who Margaret was.”

Mike shifted their monthly conversations as Margaret's investment began to near her goal amount. “I asked Margaret what she wanted to do with this money. Margaret was very clear in her response; she wanted to give most of it to charity,” said Mike. “As we talked, I shared that was an option, but would she consider making a difference for years to come rather than making a one-time gift? She loved that idea, so I connected her with the Community Foundation.”

Per Margaret's instruction, over \$850,000 was used from her estate to establish the Margaret Kitzrow Charitable Fund at the Community Foundation. This permanent endowment honors Margaret by making annual gifts to her charity of choice, the local chapter of the American Diabetes Association.

“I have friends who ate at Noah's weekly because they knew they would see and talk with Margaret. She was beloved,” said Mike. “Thanks to her charitable fund at the Community Foundation, the consistent and steadfast support Margaret provided to customers during her lifetime will continue through her charitable giving. It is the perfect pairing.”

photo: Margaret Kitzrow and Mike Tracy celebrating her Noah's Ark work anniversary.

“

AS WE REFLECT ON OUR CHARITABLE GIVING FUND AT THE COMMUNITY FOUNDATION AND THE CHARITABLE GIVING FUNDS OF OUR CLIENTS, THIS IS OUR LEGACY, AND IT WILL STAND THE TEST OF TIME. FOR GENERATIONS, THESE CHARITABLE DOLLARS WILL LEAVE A MARK ON OUR STATE AND ITS PEOPLE.”

LINDA & CHRIS COOK

ABUNDANT LIVING



Live a life of abundance. This phrase is more than a tagline at Linda and Chris Cook’s private wealth management firm, Gilbert & Cook; it reflects how the couple is committed to living their lives. “One of our organization’s core values is to inspire an abundance mindset. As we work with clients, it is our goal to assist them in defining what abundance means to them. For many clients, and us, abundance means being in service to others and using our resources to give back,” shared Linda. “We want to be great financial professionals, but when we can help someone with their charitable impact, that is a next-level relationship. That is when we feel most fulfilled,” said Chris.

The couple has been long-time active volunteers, giving their time and talents to various local organizations. They have also been generous supporters of the causes close to them through their charitable giving fund at the Community Foundation. Chris added, “We believe in recommending the Community Foundation to clients because we use it and benefit from how the organization connects us with local giving opportunities while making giving simple and strategic.” As Linda shared, “The world is complex. The financial planning process is complex. But amid all this complexity, we are here to provide simplicity for clients, and the Community Foundation shares that commitment. Much creativity goes into developing plans that meet clients’ financial and charitable priorities. The Community Foundation is a natural partner to help us think how best to solve challenging situations and meet client goals.”

“The cliché is true,” added Linda. “The more you give, the more you get. We trust the Community Foundation to fulfill our client’s goals and allow them to participate actively in giving. For Chris and me, as well as our clients, it’s the perfect partnership.”

photo: Linda and Chris partner with the Community Foundation to meet their giving goals.

STELLAR SUCCESS



“

WE HAVE SO MUCH APPRECIATION FOR THE COMMUNITY IN WHICH WE HAVE BUILT STELLAR. GARNER HAS SUPPORTED US AS INDIVIDUALS, IT HAS SUPPORTED OUR FAMILY AND IT HAS SUPPORTED OUR BUSINESS. GIVING BACK TO THE COMMUNITY THAT HAS GIVEN US SO MUCH IS THE RIGHT THING TO DO.”

DAVE ZROSTLIK &
BARBARA ZROSTLIK BEYER

When Francis Zrostlik began Stellar Industries in 1990, he did not imagine the tremendous growth and success the company would experience over the next 30-plus years. He knew that if you invest in your employees and your community, good things will happen—a value carried on by his son, Dave, and his widow, Barbara, in their management of the company.

Stellar Industries is a successful manufacturer of hydraulic truck equipment, related accessories and specialty trailers based in Garner, Iowa. “Dad had sold a successful business, but retirement was tough for a guy who had worked every day of his life,” shared Dave. “He took a risk, along with two co-founders, and used his 401(k) assets to develop Stellar Industries as an employee stock ownership plan (ESOP). When I joined the company two years later, I contributed half my 401(k) as much-needed capital.”

Over time the company grew, and the ESOP shares rose in value, but a change was needed to provide more employees’ access. “After many conversations, we decided it was time for the family to sell our shares so additional employees could participate in the ESOP and make Stellar 100% employee owned. After all, our motto is *our people, our products*,” shared Barbara.

As the family worked through the change in ownership structure, using their stock’s sale proceeds to support future charitable giving was a priority. “Garner has been very good to us. In the early days, the city provided revolving loans for capital purchases and has been a wonderful partner as we have expanded our physical space,” said Dave.

Using proceeds from the stock sale, the family turned to the Hancock County Foundation, an affiliate of the Community Foundation of Greater Des Moines, to open a charitable giving fund. Barbara added, “Needs will come up in Garner, and we need to be prepared to participate financially. We want to invest in projects with impact. We don’t know what they are yet, but know our charitable dollars are well managed at the Community Foundation and will be ready when needs arise. We want this community to be successful.” A job well done.

photo: Dave Zrostlik and Barbara Zrostlik Beyer will continue to invest in Garner, Iowa through their charitable fund.

“

DONORCONNECT AND OTHER LEARNING OPPORTUNITIES OFFERED BY THE COMMUNITY FOUNDATION ARE ONE OF THE MANY REASONS I’VE SELECTED THE ORGANIZATION AS MY PARTNER IN GIVING. THANKS TO THE COMMUNITY FOUNDATION, I CAN NOT ONLY LEARN ABOUT WHAT IS GOING ON IN THE COMMUNITY, BUT I KNOW HOW TO ENGAGE TO BE PART OF THE SOLUTION.”

CYNTHIA THORLAND

CONNECTIONS THAT COUNT



Core to the Community Foundation’s mission is connecting donors with causes they care about. Nowhere does the mission come to life in more transformational ways than DonorConnect events. DonorConnect offers an opportunity for community donors to learn about pressing community needs and promising opportunities from local leaders engaged in this critical work.

There are many obstacles for children facing mental health challenges and families seeking support. DonorConnect featured three passionate and inspirational leaders impacting the lives of youth by ensuring support is in place to provide the very best care for our kids. At the event, Please Pass the Love shared a new sticker campaign intended to make information on how to get mental health help easily accessible across the state. “After DonorConnect, I got a call from a representative at Kum & Go who had attended the event and shared she wanted to help. Kum & Go not only funded the campaign, but also agreed to place stickers in store restrooms nationwide. This connection and support would not have happened without the Community Foundation and DonorConnect,” shared Dr. Jennifer Ulie-Wells, founder of Please Pass the Love.

The stage was set at Hoyt Sherman Place for an evening of conversation and connection around the countless wonder women transforming our community through giving. Panelists donned their charitable capes and shared why giving is important to them and the strategies they employ to make a difference. “Research tells us women are leading charitable giving decisions across our country, but hearing from a powerhouse panel of women about how they’re making a difference locally was truly inspirational,” said Kristi Knous, Community Foundation president.

When United Way of Central Iowa’s research revealed Central Iowa students had experienced dips in reading proficiency, school attendance and readiness for college or career, our community was anxious to learn more. Dedicated and expert leaders in education joined DonorConnect to highlight the impacts of the pandemic on our students and what can be done to build brighter futures. “Challenges facing students and educators cannot be remedied during the school day alone, nor can the complexities be solved solely within a school building. Connecting with community members and building personal relationships at events like DonorConnect are key to ensuring the success of Central Iowa students,” said panelist Matt Smith, interim superintendent at Des Moines Public Schools.

photos: The Community Foundation hosts DonorConnect events as an opportunity to learn about our community’s needs and opportunities.

**CONNECTION
COLLABORATION
COMMUNITY**



As we seek to bring our tagline of *better together* to life, it is our honor to open the Community Foundation Campus and C3 Center to serve as a hub for connection, collaboration and community.

Opening in April of 2023, the C3 Center provides additional space to build the nonprofit sector's capacity, convene conversations around critical issues, develop the next generation of leaders and write countless other stories of impact yet to be told. The Plaza connects the Finkbine and C3 Center and offers space for reflection and inspiration in the heart of our city.



Thank you to our board of directors whose vision opened the door to what could be possible, the donors who made this dream a reality, the expert construction and design teams who exceeded every expectation and the staff who will now call this Campus home. The Community Foundation Campus and C3 Center is the exciting next chapter for the Community Foundation, but what will take place inside its walls is the most important. The connections to be made, the convergence of ideas and the community that will be built.

We are better together.



The Community Foundation supported our local nonprofit sector in 2022 by investing strategic funding support. Through the generosity of donors to the Better Together Fund, the Community Foundation can take a nimble approach to addressing pressing needs, providing leadership and supporting critical work that is improving the quality of life for us all.

LEADERSHIP GRANTS

The Leadership Grant program, funded by the Better Together Fund, provided five grants to projects making a significant impact on the lives of individuals and families throughout Greater Des Moines.



Center @ Sixth: This location is being developed to ensure small business owners' dreams have a space to be realized in the heart of our city. The Center @ Sixth will be a mixed-use commercial space in one of Des Moines' most ethnically diverse neighborhoods. The Community Foundation's grant supported the creation of a nonprofit Black and Brown main street business incubator within this 12,000 square foot facility to strengthen and serve small business owners of color who will, in turn, make Greater Des Moines greater.



Reichardt Community Recreation Center: To create community, spaces are needed for convening and connection. The newly imagined Reichardt Community Recreation Center, supported by a Community Foundation grant, is a dream realized by and for those who call Des Moines' north side home. The 40,000 sq. ft. facility will feature STEAM-oriented activities for youth, an interior NBA-sized gym and an indoor aquatic facility. This community center will positively impact the residents of Des Moines for generations to come.



Des Moines Area Regional Transit Authority (DART) 50314 On-Demand Pilot: For some in our community, transportation is the barrier that stands in the way of employment opportunities or access to health services. To find solutions to this challenge, the Community Foundation provided a grant to pilot an on-demand micro-transit service within the 50314 zip code through DART. This innovative program seeks to respond to the community's expressed needs by offering affordable transportation to improve individuals' financial stability and wellness.



WesleyLife Meals on Wheels Expansion: Meals on Wheels provides more than food; it offers a personal connection to older adults in our community. WesleyLife's renovation of an existing University Avenue building will provide a sustainable home for Meals on Wheels and triple its capacity to serve, provide meals and offer wellness checks. The Community Foundation's grant will support the renovation and expansion as Meals on Wheels seeks to reach its goal of serving 700,000 meals annually in Greater Des Moines.



Iowa Homeless Youth Centers 6th Avenue Flats Mental Health Services: Young people who are homeless or have aged out of foster care not only need a safe and secure space to call home, but also need necessary wrap-around services to succeed. Iowa Homeless Youth Centers' (IHYC) 6th Avenue Flats is a first-of-its-kind initiative in Central Iowa, embedding mental health support into an affordable housing setting. A Community Foundation grant supported the addition of on-site mental health services for residents of the 42-apartment complex and the broader community. This unique project will transform how the community delivers place-based mental health services to those in need of support.

CAPACITY BUILDING GRANTS

As nonprofits focus on strengthening overall governance and management, the Capacity Building Grant program provided 39 grant awards for strategic planning, succession planning, fund development planning and more.

STRATEGIC ALIGNMENT GRANTS

Strategic Alignment Grants were awarded to five initiatives seeking ways to leverage the strengths of colleague organizations to meet needs and create opportunities in Greater Des Moines.

TOTAL CHARITABLE GIVING FUNDS = 2,474

OVER **\$67.6** MILLION

GRANTED

from Community Foundation charitable giving funds.

OVER **\$108.1** MILLION

CONTRIBUTED

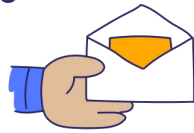
to Community Foundation charitable giving funds.

OVER **\$815** MILLION

ASSETS

under administration at the Community Foundation.*

GRANTS

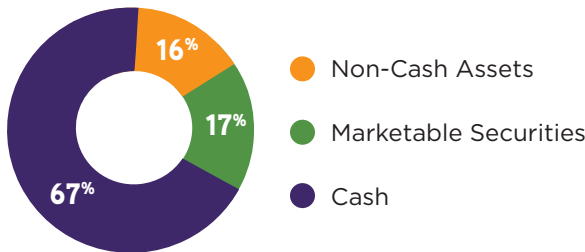


We sent **9,875** grant checks to charities from Community Foundation charitable giving funds.

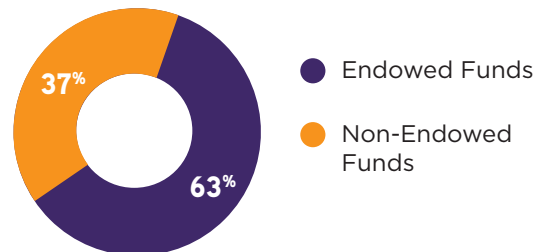


3,530 charities received support from Community Foundation charitable giving funds.

CONTRIBUTIONS BY TYPE

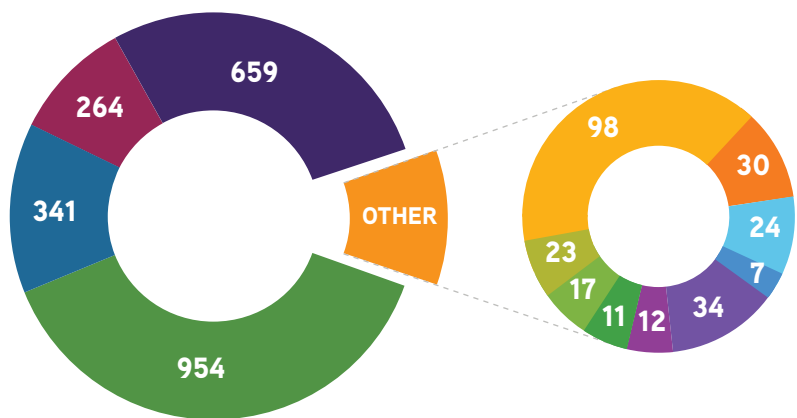


ENDOWED VS. NON-ENDOWED



CHARITABLE GIVING FUNDS BY TYPE

- Agency - 659
- Committee Advised - 264
- Designated - 341
- Donor Advised - 954
- **OTHER:**
 - Administrative - 7
 - Better Together - 34
 - Catalyst Circle - 12
 - Charitable Gift Annuity - 11
 - Community Betterment - 17
 - Field of Interest - 23
 - Legacy - 98
 - Scholarship - 30
 - Seed - 24



Audited financial statements are available at www.desmoinesfoundation.org/finance.

*Includes assets administered but not owned by the Community Foundation.

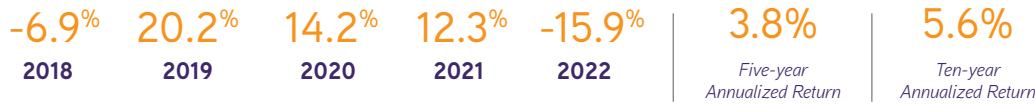
COMMUNITY FOUNDATION INVESTMENT PORTFOLIOS

The Community Foundation offers a variety of investment options to meet a range of charitable goals and time horizons. Each of our investment portfolios is carefully constructed and diversified across global investment opportunities to maximize return and minimize volatility. Returns are net of all investment fees. Returns for periods greater than one year are annualized.

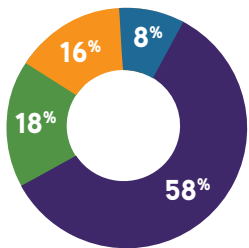
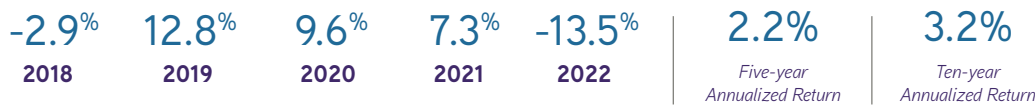
The Long-Term Growth Portfolio seeks maximum growth and controlled risk through a diversified portfolio of global stocks, bonds and alternative investment strategies.



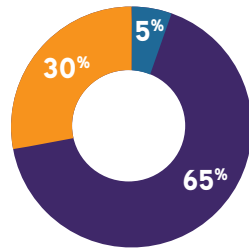
The Indexed Growth Portfolio seeks maximum growth primarily through indexed funds and lower active management.



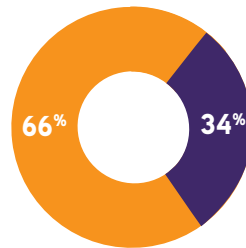
The Moderate Growth Portfolio is designed for growth at a more moderate level of risk.



LONG-TERM
Growth Portfolio



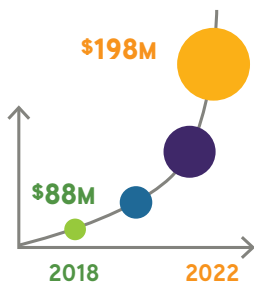
INDEXED
Growth Portfolio



MODERATE
Growth Portfolio

- Alternatives
- Fixed Income
- Equities
- Liquid Alternatives

(Charts reflect target asset allocations.)



OVER THE PAST 5 YEARS,
THE CHARITABLE INVESTMENT PARTNER PROGRAM
**HAS GROWN FROM \$88 MILLION TO
MORE THAN \$198 MILLION**

Through this program, investment advisors can establish portfolios for Community Foundation charitable giving funds, providing their clients with unique charitable giving resources and personalized investment management.



COMMUNITY FOUNDATION BOARD OF DIRECTORS 2023

BOARD MEMBERS

Franklin Codel, *Chair, Community Volunteer*
 Susan M. Fitzsimmons, *Vice Chair, Christensen Development*
 Gerry Neugent, *Secretary, Knapp Properties*
 Steve Lacy, *Treasurer, Dotdash Meredith, Retired*
 Andrea Abel, *Community Volunteer*
 Teree Caldwell-Johnson, *Oakridge Neighborhood*
 Joyce Chapman, *West Bank, Retired*
 Marta Codina, *Wells Fargo Bank, N.A.*
 Mary Coffin, *Wells Fargo Bank, N.A., Retired*
 Peter Cownie, *Iowa State Fair Blue Ribbon Foundation*
 Suzanna de Baca, *Business Publications*
 Kathy Fehrman, *Community Philanthropist*
 Allison Fleming, *Community & Child Advocate*
 Dr. Adreain Henry, *Mercy College of Health Sciences*
 George Hiller, *Hiller & Associates*
 Dan Houston, *Principal Financial Group*
 Debbie Hubbell, *Community Volunteer*
 Fred Hubbell, *Engaged Citizen*
 Joseph Jones, *Des Moines University*
 Dan Keough, *Holmes Murphy & Associates, LLC*
 Ardis Kelley, *Federal Home Loan Bank of Des Moines*
 Izaah Knox, *Urban Dreams*
 Marty Martin, *Drake University*
 Sheldon Ohringer, *Caleris, Retired*

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 Darren Rebelez, *Casey's General Stores*
 Sunnie Richer, *Doextra*
 Robert G. Riley, Jr., *Riley Resource Group*
 John Ruan IV, *Bankers Trust Company*
 Mark Rupprecht, *R&R Realty Group*
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* Indicates deceased members.



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 Jacey Roy
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