# BETTER TOGETHER

2021 REPORT TO THE COMMUNITY





Dear Community Foundation Friends,

Just over one year ago our world turned upside down. Our day-to-day routines changed drastically as we sought to keep one another safe and grapple with our new normal. At the Community Foundation, we immediately saw needs arising in our community. Many of the issues that have long existed in our community had a spotlight shone on them. Many individuals and families that had not previously needed support were now barely hanging on. And many of you stood ready to rise to the occasion by once again offering your support.

In those early days of the pandemic, I was often asked how I thought our community would respond to the challenges before us. Thanks to you and the spirit of generosity I have seen you display time and time again, I could confidently say we were made for times like these. Not that the road toward recovery wouldn't be long or the obstacles wouldn't be many, but, again, we were made for times like these. Times where our neighbors required assistance to stay healthy and housed. Times when our young people needed support to navigate education outside of the typical classroom. Times when the marquees of our arts and cultural organizations were dark, but the light of creativity in our community continued to shine brightly. Times when our community needed us.

You stepped up and you showed up in so many ways. You granted a record-breaking \$70.1 million from charitable giving funds to nonprofits in 2020. You participated in our Conversations that Count series to learn more about the racial disparities that persist for our neighbors of color. You supported us as we engaged over 2,800 nonprofit staff and board members in conversation and connection to navigate this unprecedented time. You came alongside us as we activated the Disaster Recovery Fund on behalf of our community and raised over \$1 million to support our neighbors facing challenges presented by the COVID-19 pandemic. You made all of this and more possible by partnering with the Community Foundation. On behalf of our board, staff and the broader community, thank you. Thank you for the trust you have placed in us as your partner in charitable giving. Through our partnership, we are truly creating transformational change at a time when our community needs us most.

I am confident we are already moving toward a better normal. All we have accomplished is just the beginning of the work there is yet to do. But, thanks to you, we stand ready. Ready to serve, ready to lead, ready to fulfill our ongoing commitment to being not only better together, but better forever.

With deep gratitude and respect,

Kristi Knous

Community Foundation, President





# **LEAVING IT BETTER** | BARRY GRISWELL

In 2020 we lost a dear friend and tireless community champion, Barry Griswell. As a past president and board member of the Community Foundation, Barry challenged us to dream big, seek transformational change and, above all, engage with our neighbors to listen, learn and encourage collaboration as we make Greater Des Moines better together. Barry's presence lit up the room and his legacy will light the way for generations to come.

**GRANTED** 



FROM BETTER
TOGETHER FUND

**ENGAGED** 



MORE 2,800 INDIVIDUALS THAN

COMMUNITY FOUNDATION
TRAININGS & CONVERSATIONS

**MANAGED** 



2,148

CHARITABLE
GIVING FUNDS

# **2020 AT A GLANCE**



\$70.1 MILLION

in **GRANTS** made from Community Foundation charitable giving funds

2,286 CHARITABLE CAUSES

supported from Community Foundation charitable giving **FUNDS** 

\$738 MILLION

in **ASSETS** under administration

**\$86.6** MILLION

in **GIFTS** contributed to Community Foundation charitable giving funds



convened groups around pressing community



served 43 affiliate county and community foundations statewide



worked with **68** Charitable Investment Partners educated **432** individuals at **DonorConnect** events

pivoted grantmaking in response to the **COVID-19** pandemic

provided administrative support through Nonprofit Accounting Services to **32** organizations

# WE RISE TOGETHER

There is no question the past year challenged us. But through it all, we have been reminded that together is not something we can measure in miles or feet, but rather by our commitment to one another. Thanks to you, the Community Foundation was made for times like these. And as we rise from these difficult times, we rise stronger than ever. We rise together.

# **DISASTER RECOVERY FUND**

The Community Foundation activated the Disaster Recovery Fund in partnership with key community organizations to provide a centralized place for giving with the objective to support the most vulnerable populations facing the impact of the COVID-19 pandemic. Over \$1 million has been raised thanks to the generosity of our community.

# **COMMUNITY CIRCLES AND CONVERSATIONS**

As the nonprofit sector reeled from the challenges the pandemic presented, we developed an online series called Community Circles and Conversations. In each session, nonprofit staff and board members were able to learn from experts on topics designed to help navigate the pandemic, racial equity issues, funding strategies and so much more. Additionally, these sessions provided an opportunity for nonprofit colleagues to connect with one another and share their struggles and triumphs, even during a time of being physically apart.

# **DONORCONNECT**

Charitable giving fund holders were eager to learn of community needs and wanted to offer support where it was most needed. We held two online DonorConnect events providing fund holders the opportunity to learn from community and nonprofit leaders on the state of our region and ways to have an impact.

# **COMMUNITY FOUNDATION TRAININGS**

As the needs of the nonprofit sector changed, so did our training opportunities for board and staff members. From holding a session on how to build better virtual meetings to exploring state and federal assistance programs for nonprofits, we were able to connect our local nonprofit sector with the information they needed to know.

# **GIVING TUESDAY NOW**

In an effort to raise awareness around community needs, we developed a toolkit for local nonprofits to use as they participated in a national day of online giving, Giving Tuesday Now. We saw donors and nonprofits alike embrace this opportunity to share and give when and where it was needed most.

# **PIVOTED GRANTMAKING**

We quickly evolved our grantmaking priorities and cycles to provide more nimble funding, centered grant awards around equity and served populations disproportionately impacted by the pandemic. Additionally, new grant programs were created to respond to changing and critical nonprofit needs. Adaptation Grants provided an opportunity to support nonprofits as they pivoted their services or experienced a surge in need. Strategic Collaboration Grants supported organizations as they considered opportunities to merge or align programming as they imagined what was possible by being better together.

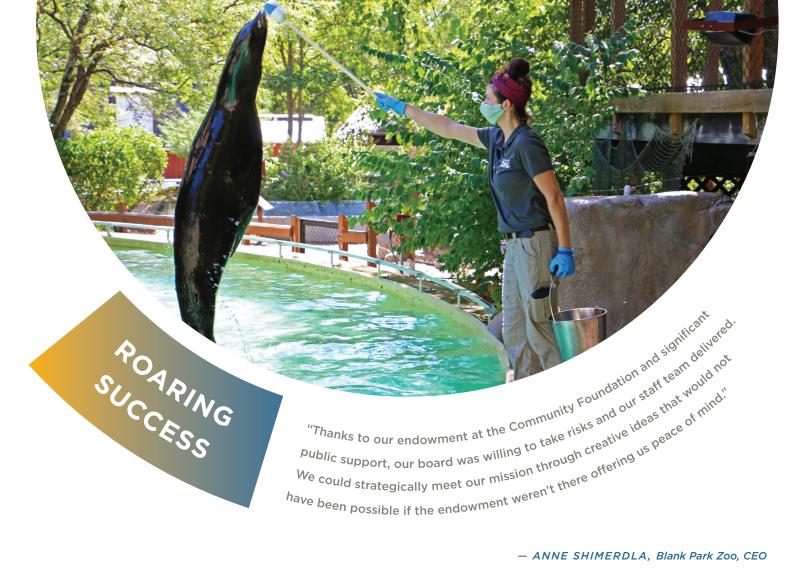
# **CONVERSATIONS THAT COUNT**

As we sought to listen, learn and act to make Greater Des Moines a community where all are welcomed, protected and justice is valued; the Community Foundation convened a series called Conversations that Count. These virtual events provided an opportunity to engage with members of our community who work tirelessly advocating for racial equity and inclusion to be the strongest threads that weave our community together.

# **GIVEdsm**

GIVEdsm is a website, offered by the Community Foundation, that provides an opportunity to learn about local organizations and needs. In 2020, a new GIVEdsm site was launched to make it easier for nonprofit partners to share opportunities to support their missions and for our generous community to support their work. Additionally, a COVID-19 area of interest was added so donors interested in supporting needs elevated by the pandemic could connect.





- ANNE SHIMERDLA, Blank Park Zoo, CEO

As public health concerns halted normal operations at Blank Park Zoo (BPZ), the innovation of the staff never faltered. "Fear of losing their jobs set in quickly with our staff," shares Anne Shimerdla, BPZ CEO. "Our top priority was connecting with our team and sharing they had a job; it just might look a little different."

BPZ leadership had the confidence to make that decision because of incredible community and member support as well as their endowment, administered by the Community Foundation. "We faced a 50% budget reduction, but furloughing the animals in our care was not an option. To continue best-in-class care we needed to remain fully staffed. Though we didn't want to have to use it, our endowment provided a sense of relief and allowed our team to come together and brainstorm ways to serve the public."

"We received an Adaptation Grant from the Community Foundation to purchase the necessary technology to move our programming online," says Amanda Nuzum, BPZ VP/CDO. "From there our entire team pivoted. We offered online education to assist families navigating learning from home, we placed a webcam on our coral

reef to offer relaxation, we engaged through our social media channels and much more." Additionally, the BPZ Board decided to finish the ZooPlex event center, a project supported through a Community Foundation Leadership Grant. "The Community Foundation understood our long-term vision for the ZooPlex, now the Holmes Foster Events Center, as a space that offers alternative revenue sources. This has positioned us well as we move through recovery and on to resilience."

Given the leadership of the Zoo's staff and board, and member and community donations, the organization didn't have to take additional dollars from its endowment. Instead, they began Preservation Partners, an endowment campaign offering the opportunity to leave a lasting legacy to BPZ. "Our endowment is meant to ensure the long-term future of the Zoo," adds Anne. "We are proud that we have been able to preserve it knowing future generations will continue to be introduced to the natural wonders of our world."

photo: The Blank Park Zoo pivoted operations to care for their animals and continue public education online with peace of mind that their endowment at the Community Foundation could provide assistance if needed.



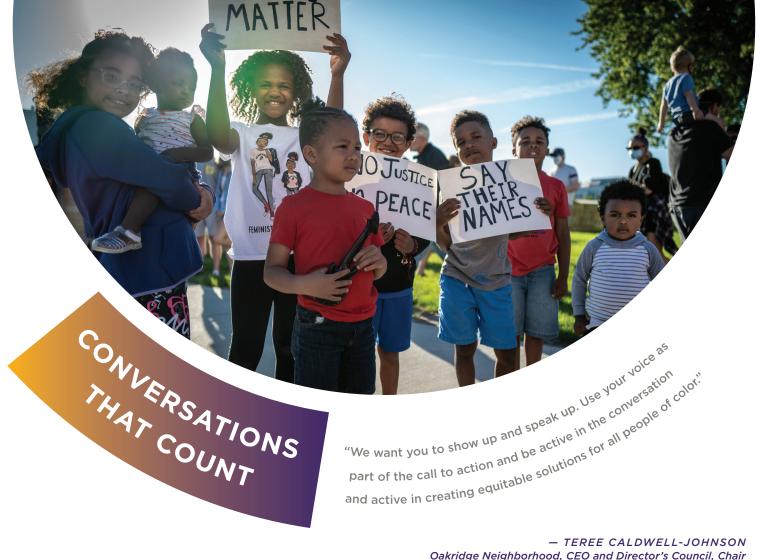
- MEG & PATRICK WHITTY

Meg (Bolin) and Patrick Whitty both grew up in Greater Des Moines, but it was through careers in Washington, D.C. where the couple first met. Their shared love for their hometown created a connection and, eventually, led them home. "After our son was born, we decided it was time to come back to Des Moines," says Meg. "Our friends have asked us if we miss the 'big city' and the answer is honestly no. We love being home."

"We believe in Des Moines and Iowa," says Patrick. "Moving back, we were excited to get involved, but the COVID-19 pandemic interrupted our plans." While some plans were paused, the pandemic didn't stop the couple's desire to support the community. Adds Patrick, "As we considered where to give as the crisis hit, we were looking for opportunities with capacity and infrastructure at the ready. The Disaster Recovery Fund at the Community Foundation was prepared with partners and a plan. We were confident the Disaster Recovery Fund would maximize our gift and ensure support was going where it was most needed." Supporting the Disaster Recovery Fund led the Whittys to consider how the Community Foundation could help them meet additional giving goals. "We had been saving to support our giving, but we hadn't found the right vehicle to put a plan into action," shared Meg. "A Seed Fund with the Community Foundation felt like the right tool to help us be strategic in our giving. The Community Foundation has deep roots in Greater Des Moines to assist us as we provide support in the short and long-term."

"We are so proud of the transformation that has taken place in this city and the work the community has done to invest in itself," shares Patrick. "We look forward to being a part of what comes next."

photo: Meg and Patrick Whitty are teaching their children, Kit and Will, the importance of investing in community through their seed fund and support of the Disaster Recovery Fund.



- TEREE CALDWELL-JOHNSON Oakridge Neighborhood, CEO and Director's Council, Chair

As light was shone on the reality that racial inequities continue to divide our country, the Community Foundation recognized these are divisions we must bridge in the community we love. We knew it was critically important to set a virtual table through our Conversations that Count series where we could listen and learn to drive action toward making Greater Des Moines a community where all are welcomed and racial equity is embraced.

These conversations presented an opportunity to engage with local leaders who work tirelessly advocating for equity and inclusion to be the strongest threads that weave our community together. As we walked through systemic and persistent issues facing communities of color in Greater Des Moines, we were challenged to consider how we can each work toward building a home where all are truly better together.

"We all have our own set of values," shares Deidre DeJear. "When we sit down together, the effort is to get to know one another from that vantage point,

but we must challenge ourselves to get outside of our comfort zone. When we intentionally step outside our comfort zone to connect with folks we may not otherwise connect with, then we can go the distance toward change."

Adds event attendee and Community Foundation fund holder, Trudy Hurd, "If we are going to move forward in a way that is going to benefit everybody, we have to take part in conversations around social justice. We do not know the answers, but with humility, courage and commitment, we can cultivate and grow the relationships that will."

photo: As our community came together this past summer to raise their voices for social justice, the Community Foundation hosted Conversations that Count to dive deeper into equity issues facing communities of color.



- DOUG MORSE, Hansen Family Hospital, CEO

Real-life superheroes don't wear capes. In 2020 many of our heroes wore scrubs and personal protective equipment to care for us in the face of tremendous obstacles. And while their efforts should be ever applauded, so too should the support provided by fellow community members. Community members like the Howard family of lowa Falls.

Steve Howard, the eldest of Marilyn and the late Dale Howard's children and a longtime member of the Board of Trustees at Hansen Family Hospital (HFH), holds local healthcare as a cause close to his heart as he watched his father battle cancer later in life. When HFH CEO Doug Morse mentioned the lowa Falls hospital was the only hospital in the Mercy Network without a farmland gift supporting its foundation, Steve was ready to rise to the challenge.

"I went over to Mom's that night and I mentioned it to her. And she said, 'You know, I think I might be interested in that; let me give it some thought.' And after about a week, she said, 'How would that work?" After surveying the options and consulting with advisors, the Howards decided to take advantage of the Community Foundation's Keep Iowa Growing program. Donors can contribute land, farm equipment, even grain, to be managed by the Community Foundation with the proceeds going to local causes of their choice. The Howards chose to take advantage of Keep Iowa Growing to open a charitable giving fund with the Hardin County Community Endowment Foundation, the family's local community foundation and an affiliate of the Community Foundation of Greater Des Moines. This personalized approach to giving made the family's decision easy. "It's very important to me that the hospital succeeds and is a viable part of our community," said Marilyn. "It was a no-brainer."

Adds Morse, "On a very practical level, this was such a boost to everyone here at the hospital at a time when we all really needed it. This gift will be an important part of our recovery and stability."

**photo:** Steve Howard (left) and his family took advantage of the Community Foundation's Keep Iowa Growing program to support their local hospital led by Doug Morse (right). Photo courtesy of the Times Citizen newspaper.



- LINDA CARTER-LEWIS

"Yes We Can" was the theme of a speech the late Larry Carter gave during his service as president of the Des Moines NAACP. While the words carried the hope of a more equitable future, they also reflect Larry's powerful legacy of empowering others to dream and achieve.

After becoming the first African American student to graduate from the Intermountain School of Telegraphy, Larry went on to further his education at St. Louis University and recognized the doors that opened to him through education. In addition to serving as Assistant Vice President of Administrative Services at Norwest Financial, Inc., now Wells Fargo, Larry's commitment to community went beyond the board room. As a spokesperson for civil rights, Larry served on countless boards and committees in addition to four terms as president of the Des Moines NAACP and 12 years as a member of the NAACP National Board of Directors.

Upon completion of his service as president of the Des Moines NAACP, friends and colleagues established the Larry W. Carter Scholarship Fund at the Community Foundation to serve Larry's dream of providing financial assistance to Black students seeking higher education.

"Given Larry's career in human resources and his activity in the community, he knew the power of a college degree," shares Linda Carter-Lewis, Larry's wife of 30 years. "He also saw the bias students of color faced in obtaining their degrees and the lack of financial support they received in their second semester or year. He recognized the financial burden was often the final challenge that made students of color give up on their educational aspirations."

Each year, the Larry W. Carter Scholarship recipients and their families gather for an inspirational evening where they connect with the scholarship selection committee members at the Community Foundation. Shares Linda, "The reception provides an opportunity to bring Larry's dream to life. We get to connect with each student and show them there is a community of people standing behind them, supporting them and who are believers in their dreams. We have an opportunity to join with their loved ones to say yes you can; we believe in you."

**photo:** Linda Carter-Lewis (third from left in this photo from the 2019 scholarship reception) continues to honor the legacy of her late husband, Larry W. Carter, through a scholarship fund at the Community Foundation.



— DAWN MARTINEZ OROPEZA Al Exito & Iowa Immigrant Community Fund, Executive Director

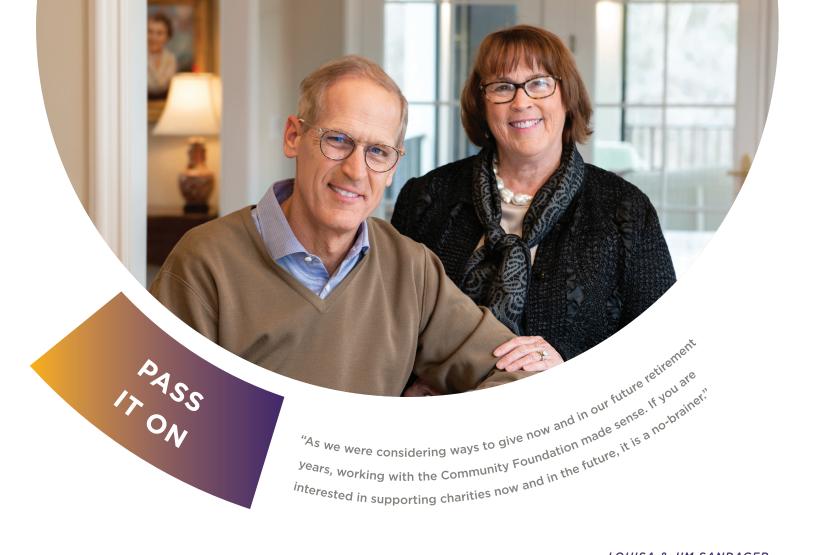
"If we want to be a community that gets through tough times together, we cannot leave anyone behind," shares Monserrat Iñiguez, Proteus Program Specialist for the lowa Immigrant Community Fund. As the Latinx community in lowa faced significant challenges due to the COVID-19 pandemic, nonprofit partners came together to develop collective action. The lowa Immigrant Community Fund was developed, thanks to support from the Disaster Recovery Fund, as an initiative of the American Friends Service Committee of lowa, Al Exito and Proteus Inc. to assist community members facing significant challenges due to loss of income, illness or other COVID-19 related impacts.

"We have been able to help people with basic needs like keeping the electricity and water on, or for households with children, providing internet so they can continue to engage in school during remote learning," says Iñiguez.

This commitment to neighbors helping neighbors is at the heart of the work of the Disaster Recovery

Fund. As the community rallied to support those most impacted by the COVID-19 pandemic, the Community Foundation activated the Disaster Recovery Fund in partnership with key community organizations. This collaborative approach provided an opportunity to listen and learn about the ever-evolving needs of the community and respond with funding investments where they were needed most. Adds Iñiguez, "The fact that the Disaster Recovery Fund exists has been inspirational to those we serve. They feel seen and are thankful that people are looking out for one another. We are building community."

**photo:** Thanks to support from the Disaster Recovery Fund, the lowa Immigrant Community Fund provided an opportunity for support of basic needs during a time when it was critically needed.



- LOUISA & JIM SANDAGER

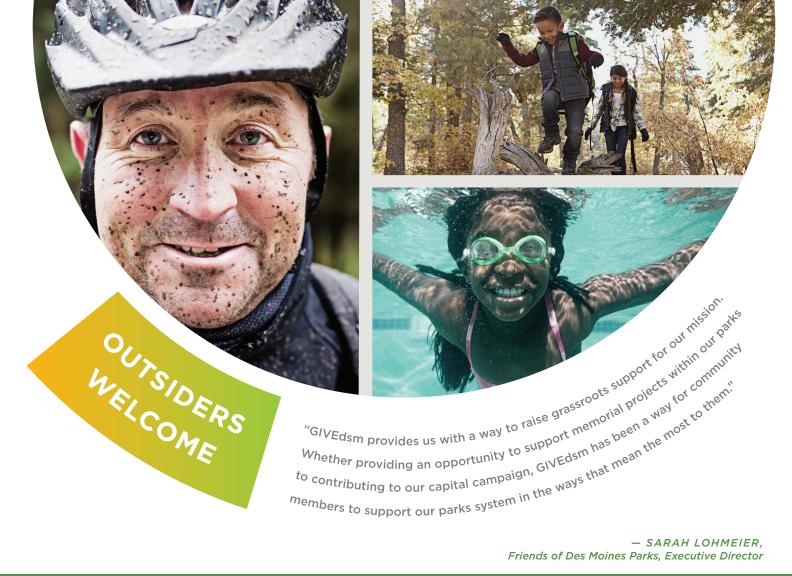
Mentorship has played an important role throughout Louisa and Jim Sandager's lives. Mentors have shaped their careers, the couple's commitment to community service and their shared desire to give not only their time and talents but their treasure as well. "I watched my parents give their time and resources, and I learned from Louisa's father the positive effects getting involved has in a community," shares Jim. "As we were considering ways to honor our parents and their legacy of giving, working with the Community Foundation was a great fit."

Adds Louisa, "We want to pass the baton as it was passed to us. With two grown children, we want to share the values that were shared with us and help teach them what we have learned; impact is created by looking outside yourself."

As the couple considered charitable giving strategies with their accountant, using land they owned at a low-cost basis provided an excellent way to fund a charitable giving fund at the Community

Foundation. "As a financial advisor, I was familiar with the Community Foundation team and its excellent reputation. Personally, I was pleased with the way the team stepped up when time was of the essence to facilitate our gift by year-end. The team made it easy, and we had every confidence it would be accomplished at the highest level. Working with the Community Foundation has gone from being a great tax strategy to being a personally impactful strategy that helps others."

**photo:** Jim and Louisa Sandager partnered with the Community Foundation to use the sale of land as an opportunity to fund their charitable giving in their future retirement years as a tax-wise strategy that also met their long-term charitable goals.



- SARAH LOHMEIER. Friends of Des Moines Parks, Executive Director

With over 75 parks, 4,000 acres of open space, 82 miles of trails and 25 aguatic centers, the Des Moines parks system has provided necessary solace through outdoor recreation during the COVID-19 pandemic. Supporting these amenities is a powerful partnership between Des Moines Parks and Recreation and the Friends of Des Moines Parks. Friends of Des Moines Parks is a small nonprofit with a big mission; a mission our community should be aware of.

"We have wonderful partners who support our work, but are always considering opportunities to increase visibility," shares Sarah Lohmeier, Friends of Des Moines Parks executive director. "The Community Foundation's website, GIVEdsm, has been a great tool to share more about our projects with community members."

"As a small organization, having a direct, user-friendly way for potential donors to give online has been transformational. When you post a project to GIVEdsm, not only do you get to amplify your work with the community, but you also get the administrative support of the Community Foundation team. For example, as our projects on GIVEdsm gained momentum, sending the tax receipts for gifts made to our projects through GIVEdsm would have taken all my hours for the week as a part-time executive director. Instead, the Community Foundation issued those gift receipts through GIVEdsm, and I could focus my time on moving the projects forward," says Sarah. "GIVEdsm is providing a way for us to do good where it is most needed."

photo: The Community Foundation's GIVEdsm site provided an opportunity for Friends of the Des Moines Parks to connect with new donors and offer an opportunity to give online in support of their work.

# **TOTAL CHARITABLE GIVING FUNDS = 2,148**

OVER \$70.1 MILLION

# **GRANTED**

from Community Foundation charitable giving funds.

OVER \$86.6 MILLION

# **CONTRIBUTED**

to Community Foundation charitable giving funds.

OVER \$738 MILLION

# **ASSETS**

under administration at the Community Foundation.\*

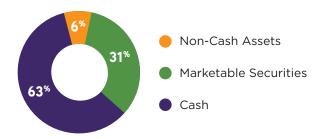


grant checks to charities from Community Foundation charitable giving funds.

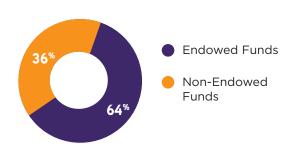


2,286 charities received support from Community Foundation charitable giving funds.

# CONTRIBUTIONS BY TYPE



# **ENDOWED VS. NON-ENDOWED**



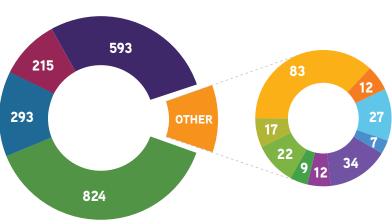
# CHARITABLE GIVING FUNDS BY TYPE



Field of Interest - 17

Legacy - 83 Scholarship - 12 Seed - 27





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. All returns are net of all investment fees. Returns for periods greater than a 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.

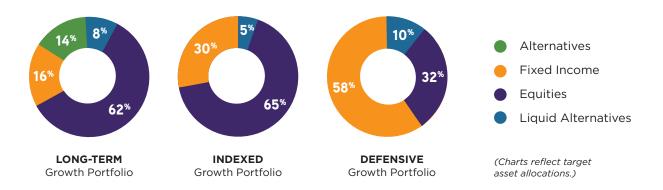
5.3% 17.2% -7.3% 19% 11.3% 8.7% 7.7% 2016 2017 2018 2019 2020 Five-year Annualized Return November 2002

The Indexed Growth Portfolio seeks maximum growth primarily through indexed funds resulting in lower active management risk.

6.2% 16.1% -6.9% 20.2% 14.2% 9.5% 8.2% 2016 2017 2018 2019 2020 Five-year Annualized Return July 2010

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

3.6% 9.2% -2.9% 12.8% 9.6% 6.3% 5.9% 2016 2017 2018 2019 2020 Five-year Annualized Return July 2010





OVER THE PAST 5 YEARS, THE CHARITABLE INVESTMENT PARTNER PROGRAM

# HAS GROWN FROM \$44 MILLION TO MORE THAN \$172 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.

# 2021 COMMUNITY FOUNDATION BOARD OF DIRECTORS

### **BOARD MEMBERS**

Richard L. Deming, M.D., *Chair* Kristi Knous, *President* Franklin Codel, *Vice Chair* 

Cara K. Heiden, Secretary & Treasurer Andrea Abel, Community Volunteer

Frederick V. Buie, Keystone Electrical Manufacturing Co.

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

Kathy Fehrman, Community Philanthropist Susan M. Fitzsimmons, Christensen Development

Allison Fleming, Community & Child Advocate

George Hiller, Hiller & Associates

Dan Houston, *Principal Financial Group*Debbie Hubbell, *Community Volunteer* 

Joseph Jones, *The Harkin Institute* 

Izaah Knox, *Urban Dreams* 

Kyle J. Krause, Krause Group

Marty Martin, *Drake University* 

Gerry Neugent, Knapp Properties Sheldon Ohringer, Caleris, Retired

Jill Oman, Community Volunteer

Rosemary Parson, EquiTrust Life Insurance Company

Sunnie Richer, Doextra

Robert G. Riley, Jr., Riley Resource Group

John Ruan IV, Bankers Trust Company

Mark Rupprecht, R&R Realty Group

Brad Schoenfelder, Ryan Companies

Jessica Snyder, GuideOne Insurance

Cynthia S. Thorland, Life Care Services, Retired

Connie Wimer, Business Publications

## **2021 EMERITUS BOARD MEMBERS**

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Monroe Colston\*
Ann Cownie\*
James S. Cownie
Johnny Danos\*
Robert Dee\*

William Friedman, Jr. J. Barry Griswell\* James W. Hubbell, Jr.\*

G. David Hurd\* Ted M. Hutchison William C. Knapp Linda Koehn Donald F. Lamberti Maddie Levitt\* James E. Luhrs\* Robert Mannheimer\* Amos Pearsall, Jr.\* Marvin Pomerantz\*

J. Edward Power
Janis Ruan
Fred Weitz

\* Indicates deceased members.

# 2021 COMMUNITY FOUNDATION STAFF

### **EXECUTIVE**

Kristi Knous, MPA, CAP\*, FCEP

# CHARITABLE GIVING

Lynne Yontz, CAP\*, FCEP
Chief Charitable Giving Officer
Joe Sorenson, CAP\*
Vice President of Affiliate Relations
Sarah Reichardt, MA, CAP\*
Director of Donor Relations
Jordan Richardson, CAP\*
Director of Charitable Giving
Thomas Biedenfeld
Charitable Giving Coordinator

Rebecca Murphy
Affiliate Relations Coordinator

COMMUNITY IMPACT

Angela Dethlefs-Trettin, MA Chief Community Impact Officer Kameron Middlebrooks Director of Community Impact

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Barb Hobson
Executive Assistant &
Events Coordinator
Kate McClaskey
Administrative Assistant
Bridgett Robinson
Administrative Assistant







