



Pilot Program Staffing Support Grant/Funds

In November of 2007, the Iowa Council of Foundations (ICoF) and the Community Vitality Center (CVC) supported the Community Foundation of Greater Dubuque through funding to provide direct staffing support to grow local community foundation affiliate organizations through various efforts such as building endowment funds, networking with professional advisors and promoting the importance of charitable opportunities in regard to the transfer of wealth information in Iowa. We have heard from all pilot projects about various successes and it is now time to collect a more formal report on the work that was conducted for your specific project, in part, due to the support from the ICoF and CVC.

The Iowa Council of Foundations and the Community Vitality Center request the following information, to be submitted via hard copy and email, *no later than April 15, 2009 (see submission information at the end of this document)*. Such reporting, unless otherwise specified by your organization in writing, will also *indicate your desire to extend the pilot project program for one additional year*. Upon review and any necessary follow-up by the ICoF and CVC, your community foundation will receive notification as to potential funding for an additional year.

Organizational Information:

Community Foundation Affiliates Engaged in the Pilot Program Staffing Grant/Funds: Clayton County Foundation for the Future, Allamakee County Community Foundation, Foundation for the Future of Delaware County and Dyersville Area Community Foundation

Host Community Foundation: Community Foundation of Greater Dubuque

Host Community Foundation Main Contact: Nancy Van Milligen, CEO

Email: nancyvanm@dbqfoundation.org

Phone Number: 563-588-2700

Street Address: 700 Locust, Suite 195 City, St, Zip: Dubuque, IA 52001

Individual Serving as Pilot Program Staff as a Result of Funding: M.J. Smith

Email: dev@dbqfoundation.org Phone Number: 563-588-2700

Briefly describe the structure of this arrangement (consultant, contractor, employee, etc.): employee

Provide the time commitment put forth by this individual to work on the Pilot Program Staffing Grant/Funds (i.e. 34 hours/week, 20 hours/month): 12-16 hours/week

Signatures

President/CEO of Host Community Foundation

Date

Individual Engaged as Pilot Program Staff

Date

Reporting Items:

Summary Letter

Please submit a summary letter offering a subjective observation as to the role and work of the individual/s hired through the Pilot Program Staffing Grant/Funds.

1. Include a "job description" of the specific duties this individual engaged in related to the Pilot Program Staffing Grant/Funds. **See Appendix A**
2. Included a summary of successes *as well as challenges and items that were not successful* from the perspective of the individual/s hired.
3. Include suggestions and specific goals for a potential second year of the Pilot Program Staffing Grant/Funds.

April 2009

**Pilot Program Staffing Support Grant/Funds
Summary Letter**

Summary of Successes:

- 1. Through planned outreach and ongoing support, individuals who are engaged in community leadership have emerged to serve on the affiliate boards.** This is evidenced by the number of positions being filled on the boards, attendance at meetings, and the number of board members who are electing to remain in service when their term ends. In this past year, Clayton has held 10 meetings, Allamakee and Delaware have held 8 meetings, and Dyersville has held 9 meetings.
- 2. After receiving communications and training, we find 50% of affiliate board members are prepared to act as “door openers” to individuals of high-net worth.** These board members have mastered the language of the transfer of wealth and endowment building and can make an initial connection to donors. After working with foundation staff, these high net worth donors have become stakeholders in our mission and are beginning to give back to their community. The donor list for affiliates is currently at 145.
- 3. Both group and individual events have been carried out in all the affiliates to educate and engage the professional advisors.** These events have included Continuing Education, Luncheons, and Individual Meetings. A monthly newsletter is also sent to this group (Appendix C).
- 4. The counties’ endowment funds have all grown above and beyond the state distribution.** In addition, each affiliate has added endowments, field of interest funds, and donor advised funds to their umbrella of funds. See pages 6-7 of this report.
- 5. Through support from the host with press releases, and creation of graphic communications, fund holders have been supported in sharing the message of their endowments.** See examples of marketing support for funds in Appendix E.
- 6. Regional partnerships demonstrating community leadership have resulted from connecting affiliate board members with issues and other stakeholders.** One example is the creation of the Northeast Iowa Funders Network for Sustainable Communities (See description in Appendix F).
- 7. Over time, the boards have embraced the concept of strategic grant-making.** One specific example concerns several emergency and program grants awarded to the community of Postville following last year’s immigration raid.
- 8. Through host foundation staff working and creating a presence in the affiliates, connections have been made to specifically aid non-profits in the affiliate counties.**

Examples include three successful Embrace Iowa grants for flood relief in the past year, as well as donor support for emergency needs in Postville. (News release in Appendix F)

Challenges/Goals for Year 2

1. **Despite education and outreach, there has been too little success in engaging professional advisors in sharing the Endow Iowa message.** In the rural culture, many professional advisors' clients are personal friends and these clients have already been generous to the community. The advisors are shy to engage donors with suggestion to give more. Our goal would be to fully equip professional advisors as they work on tax returns, wills, trusts and estates to just ask the question, "Fred, you're already generous to the community. Do you know about Endow Iowa? It's something you should know about."
2. **There will be an ongoing challenge to inspire and support board members to take on the mantle of door-openers.** Sharing and celebrating the success stories is one way to do this in Year 2. In addition, the Affiliate Board Member Handbook will be individualized in each county.
3. **As the economy continues to struggle, there is an ongoing need to link the non-profits in the affiliates with other funding sources.** As a host foundation, we plan to do that through the Foundation Center's Cooperating Collection in Year 2.
4. **As board terms expire, new members will be brought on board.** Members of the grant-making advisory groups may be tapped for their history and experience. as potential board members in Year 2
5. **As community needs and streams of energy emerge, community leadership will be strengthened** through regional partnerships, including conducting a workshop for the area through the Northeast Iowa Funders Network.

M.J. Smith
April 09

Specific, Evaluative Questions

Please provide responses to the following questions based on the work led by the individual hired as a result of the Pilot Program Staffing Grant/Funds.

1. List the *specific goals* put in place based on the enhance capacity offered through the Pilot Program Staffing Grant/Funds. Include goals as they relate to *outreach* and *permanent endowment building through asset development* most specifically.

Specific goals have included:

- a. Build a network between the Host and Affiliates.
 - b. Develop communications and education tools.
 - c. Provide education to boards, donors and professional advisors.
 - d. Create a frame for success by funding mileage and communications
2. Provide details as to how the funds provided by this Pilot Program Staffing Grant/Funds were used (\$10,000 in total- \$2,500 granted by the Iowa Council of Foundations and \$7,500 contracted by the Community Vitality Center).

\$10,000 was used to support the salary of M.J. Smith at 12-16 hours per week.

3. Endowment Building and Asset Development
 - a. Describe growth in the assets of the community foundation/s involved in the Pilot Project Program seen during the Pilot Project Program's year.

What follows is a description of Affiliate Funds with reference to the state gaming distribution as well as a listing of donors.

AFFILIATE FUNDS	CURRENT BALANCE
ALLAMAKEE	
Allamakee County Community Foundation	120,191.62
Allamakee County Endow Iowa Permanent Endowment Fund	63,193.06
Allamakee County New Beginning Poverty Assistance Fund	5,245.78
Allamakee Disaster Assistance Fund	10,100.00
Allamakee Dollars for Scholars Endowment Fund	3,163.17
Allamakee County Community Foundation	3,497.16
Dr. Ray Hermeier Endowed Fund for a Sustainable Waukon	9,489.63
Dr. Richard Hermeier Fund for Waukon HS Athletics	85,223.72
The Dr. Ray Hermeier Endowed Fund for Waukon	252,575.64
Saint Patrick School Endowment Fund	25,650.39
Saint Patrick School Endowment Fund	33,748.39
(Of total, ACCF received \$85,041.63 from state gaming funds)	612,078.56
CLAYTON	
Backbone Lake Friends Endowment Fund	2,414.06
Backbone Lake Friends Endowment Fund	1,416.62
Dan Barton Family Endowment Fund for Northeast Iowa Community College	7,605.04
CCFF Fund for Entrepreneurship	4,535.24
Clayton County Foundation for the Future	51,857.85
Clayton County Foundation for Our Future Operating Fund	(384.71)
Clayton Ridge Dollars for Scholars	18,549.92
Clayton Ridge Dollars for Scholars	6,387.19
Elkader Historical Society, Inc. Endowment Fund	80,584.95
Elkader Opera House Non Endowed Building Fund	3,582.39
Elkader Opera House Endowment Fund	1,443.59
Ewalu Camp and Retreat Center Endowment Fund	9,788.23
G and G Living Centers Foundation Endowment Fund	1,933.44
Garnavillo Historical Society Endowment Fund	770.36
Guttenberg Hospital Endowment Fund	8,490.02
Guttenberg Hospital Endowment Fund	673.44
Dr. Andy and M.J. Smith Donor Advised Fund	7,724.67
	207,372.30
DELAWARE	
ANDREA BOCKENSTEDT LIVE YOUR LIFE ENDOWMENT	12,787.63
Delaware County Community Foundation Operating Account	1,061.32
Foundation for the Future of Delaware County	103,522.83
Delaware County Endow Iowa Permanent Endowment Fund	64,288.11
Greater Delaware County Community Foundation Affiliate Fund	110,721.14
The Edgewood Future Fund	9,912.18
Fairview Cemetery Field of Interest Endowment Fund	9,656.98
Good Neighbor Home Society Endowment Fund	9,012.76
Larry and Jean Gritton Scholarship Endowment Fund	3,869.24
Manchester Public Library Endowment Fund	11,771.88
Maquoketa Valley Dollars For Scholars	3,784.47
Maquoketa Valley Dollars for Scholars	61,952.22
Maquoketa Valley Alliance Donor Advised Fund	2,098.19
West Delaware School District Endowment Fund	8,582.54
(Of total, FFDC received \$85,041.63 from state gaming funds)	413,021.49

DYERSVILLE

Beckman Catholic Schools Endowment Fund	7,283.55
Beckman Catholic Schools Endowment Fund	4,686.19
Dyersville Area Foundation for the Future, Inc.	46,568.60
Ghost Players Endowment Fund for Baseball History	6,900.42
Ghost Players Designated Fund for Baseball History	497.86
	<hr/>
	65,936.62
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BUDGET DETAIL

Delaware and Allamakee Counties both received \$85,041.63 in endowment funds over the past 4 years.:

FY 2009 - \$32,901.13

FY 2008 - \$19,427.25

FY 2007 - \$16,813.00

FY 2006 - \$15,900.25

- b. Describe asset development by way of planned gifts or other expected contributions to the Community Foundation/s involved. Provide information as to the process/es put in place for the Community Foundation to monitor such expectancies.

1. Planned gifts and expected contributions include:

Clayton – Legacy gift for Garnavillo Historical Society Fund

Allamakee – Legacy gift for Waukon Dollars for Scholars

Delaware – Expected contributions for a legacy fund to support children's issues

Expected contribution to build field of interest fund for a cemetery

Processes – Signed fund agreements and ongoing personal communication provide the monitor for these expectancies.

- c. Provide additional comments as to accomplishments in the area of asset development for the Community Foundation/s involved in the Pilot Project Program.

1. DACF: Dyersville Area Community Foundation has been a partner in a community-visioning project, which will be concluding in May. Foundation board members to engage donors will use the visioning process.

2. A new endowed community foundation has been formed in Farley

3. CCFF: A new endowed community fund has been started in Edgewood

4. FFCD: A new non-endowed community fund has been started in Delhi – The Maquoketa Valley Alliance

4. Implications of Increased Staff Capacity

- a. Articulate lessons learned over the Pilot Program Staffing Grant/Funds year that can be shared with other affiliate community foundations and hosts.

1. Educating and empowering board members to reach out with conviction about Endow Iowa has been the most effective strategy to endowment building through high new worth donors.

2. Providing graphic communications support for marketing of funds and creating ongoing publicity for gifts has led to growth.

- b. Provide, *at a minimum*, one success story about how the individual engaged in this Pilot Project Program successfully worked with a particular donor, organization, etc. to build assets for the community through the community foundation. (Stories provided may be shared publicly).

Steps to Success Stories

Through small group and individual education, as well as support with communications and publicity, a circle of caring connects and endowments grow!

Success: Challenge gift for scholarship telethon leads to another's planned gift

1. Allamakee County Community Foundation board member sets up meeting for Waukon Dollars for Scholars board with M.J. Smith.
2. Dollars for Scholars Board learns about Endow Iowa and establishes an endowed fund with deposits on hand.
3. M.J. Smith, with support from CFGD Graphic Designer, creates a marketing piece for new fund. Dollars for Scholars board prints the brochure.
4. Dollars for Scholars board and M.J. Smith discuss marketing endowed fund through annual telethon.
5. M.J. Smith identifies local donor to approach about challenge grant for telethon.
6. Donor agrees to provide \$10,000 challenge.
7. M.J. Smith creates news release for telethon.
8. Telethon is successful.
9. News coverage of challenge gift and telethon reaches another donor.
10. Second donor plans \$60,000 legacy gift to Waukon's Dollars for Scholars

Success: Publicity for planned gift reaches other generous history buffs

1. Clayton County Foundation for the Future Board Member contacts retired business owner.
2. The two join M.J. Smith for lunch. Donor is educated about Transfer of Wealth and the tax benefits of Endow Iowa.
3. Board member engages donor with request to consider his enviable position to be able to "remember the community." Before lunch is over, the donor agrees to set up a legacy gift for the local historical society.
4. M.J. Smith communicates with banker's professional advisor to discuss the importance of a fund agreement. Donor signs agreement.
5. Banker agrees to publicity to announce legacy gift.
6. Other donors come forth to support the fund.

Submission Information:

Please submit the following *no later* than April 15, 2009.

Organizational Information, Summary Letter and Specific, Evaluative Questions

- Emailed to Info@IowaCouncilofFoundations.org
- Emailed to medelman@iastate.edu

Organizational Information, Summary Letter and Specific, Evaluative Questions

- Mailed to: Iowa Council of Foundations, PO Box 13229, Des Moines, Iowa 50310
- Mailed to: Community Vitality Center, 183 Heady Hall, Ames, Iowa 50011



Director of Communications and Affiliate Relations Position Description

Position: Director of Communications and Affiliate Relations
Reports to: President/CEO
Supervises: None
Status: Part-time Exempt Employee/32 hours per week/flexible schedule

OVERVIEW: This position requires a dynamic, highly organized and skilled employee who has a passion for philanthropy, community empowerment, and a proven track record in personal, informal and formal communications.

POSITION REQUIREMENTS: This individual must be highly organized, a team player, possess a strong work ethic, must be an independent thinker and must be effective in representing the CEO and the CF to those served in the affiliate region.

EDUCATION AND EXPERIENCE: College degree. Experience in communications and/or journalism, as well as leadership responsibilities.

DUTIES AND RESPONSIBILITIES:

I. Responsible for the following affiliate programs in the region:

Allamakee County Community Foundation
Clayton County Foundation for the Future
Foundation for the Future of Delaware County
Dyersville Area Foundation

Including:

1. Attending board meetings
2. Making presentations at celebration events
3. Meeting with donors, non-profit boards and professional advisors
4. Creating donor education materials
5. Writing news releases
6. Developing donor contacts in the affiliate region
7. Overseeing the grantmaking processes
8. Researching rural philanthropy methods and initiatives

II. Responsible for Women's Giving Circle, including:

1. Organize agenda and attending leadership meetings
2. Organize agenda/attending Membership and Grantmaking Circle meetings
3. Research Women and Philanthropy methods and initiatives
4. Create membership materials
5. Keep membership records
6. Coordinate donor events
7. Personal communications with donors
8. Coordinate news coverage of circle activities
9. Write/distribute donor newsletter
10. Help coordinate annual conference for Women and Philanthropy

III. General Communications Responsibilities for CFGD

1. Create donor newsletter published quarterly
2. Create year-end communications
3. Create holiday greetings
4. Coordinate annual luncheon
5. Create text, taking photos for annual report throughout the year
6. Coordinate annual report production with staff and designer
7. Create text and coordinating production of donor education materials
8. Create process and policy documents for/with staff team
9. Write news releases
10. Coordinate Donor Services Committee Conversations
11. Research donor education methods and initiatives
12. Originate/review new written communications for the agency, including letters, forms, and statement inserts
13. Coordinate selected events, such as open houses
14. All other duties assigned

SUPERVISORY: No direct supervisory duties/works closely and cooperatively with Office Manager to produce communications from start to finish

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit and talk or hear. The employee is frequently required to use hands produce electronic communications. The employee is occasionally required to stand and walk. The employee must occasionally lift and/or move up to 20 pounds. Specific vision abilities required by this job include close vision.

ACKNOWLEDGEMENT:

I have carefully read and understand the contents of this job description. I understand the responsibilities, requirements and duties expected of me. I understand that this is not necessarily an exhaustive list of responsibilities, skills, duties, requirements, efforts or working conditions associated with the job. While this list is intended to be an accurate reflection of the current job, the Employer reserves the right to revise the functions and duties of the job or to require that additional or different tasks be performed as directed by the Employer. I understand that I may be required to work overtime, different shifts or hours outside the normally defined workday or workweek. I also understand that this job description does not constitute a contract of employment nor alter my status as an at-will employee. I have the right to terminate my employment at anytime and for any reason, and the Employer has a similar right.

Employee's Signature

Date

Supervisor

Date

The Employer is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, The Employer will provide reasonable accommodations to qualified individuals with disabilities and encourages prospective employees and incumbents to discuss potential accommodations with the Employer.

Giving Matters

For good. For ever.

Winter 2009

A Newsletter from the Community Foundation of Greater Dubuque Phone: 563.588.2700 Fax: 563.583.6619 www.dbqfoundation.org

"We cannot hold a torch to light another's path without brightening our own." Ben Sweetland

**You!
are the light
to our path**



A letter from
President/CEO
Nancy Van Milligen

Despite the current economic environment, I am proud to report that at year-end, you, our donors, have matched the past year's giving. In doing so, you provide important light and energy for our ongoing mission.

During the past year, the Community Foundation has paid very close attention to the market values of our permanent endowment funds. It is not our pleasure to report losses. However, we do take solace in the fact that our long-term strategy and investment philosophy served well in the worst market return for many years. Our early estimates indicate fund losses at 22% for the past calendar year. The Standard and Poor 500 index was down 38% for 2008 while the NASDAQ lost 40%. Thus, comparatively, all of our funds are in a forward position to rebound.

Due to this past year's financial storm and an uncertain period of recovery, we are asking our endowment partners to carefully study their need for a spring payout; and consider postpon-

ing the annual distribution. In the meantime, the Community Foundation's Board of Directors and Investment Committee together with our financial managers are working diligently to guard your legacy and keep it growing in the New Year. There are multiple tiers of responsibility in place to provide careful management of your fund. In fact, building an endowment insures there is always a cushion for future economic downturns.

With confidence in our mission, we begin 2009 with a renewed focus on serving donors and nonprofits, making strategic grants, and providing community leadership. Read more about our three-fold mission in this issue of Giving Matters.

I value your partnership and welcome your phone calls or emails to discuss your questions or needs at any time.

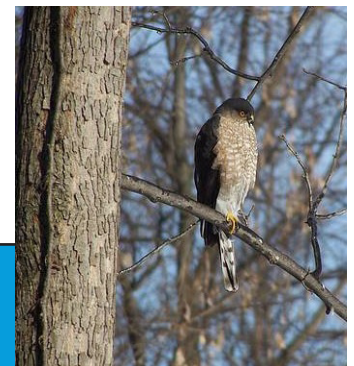
*Your community.
Your foundation.*

Community Foundations define vibrant communities

It's now been five years since Jack Schulz published *Boomtown USA*. The best-seller set off conversations around the nation about creating vibrant communities. Since the book's release, Schulz has been traveling the country, sharing his study of 400 towns in 44 states.

Recently, he created a list of attributes of America's best communities, and at the top of the list was: **A Community Foundation.**

He writes, "A Community Foundation allows a community, whether it be a single town, county or even a region, to marshal small donations and funds into the efficiency of a large foundation, altering the fabric of that community forever." To learn more, visit: www.boomtowninstitute.com



Our Mission

We work to improve quality of life in the region by:

- Helping donors touch the lives and issues they care about most
- Providing grants to nonprofits serving the community
- Providing leadership on important community initiatives

Community Foundation News

Tara Nelson has joined the staff as the director of programs and strategic initiatives. A graduate of Loras College and Catholic University of America, Tara's responsibilities include community leadership activities, supporting the annual grantmaking cycle, coordinating the McCarthy Center for Nonprofits, supervising the AmeriCorps Promise Fellows and staffing Project HOPE.



Tara Nelson

Trish Taylor, Tim Olson, and Allysa Hauser are serving the community through foundation programs as AmeriCorps Promise Fellows. Katie Angel is completing her social work field experience at the Community Foundation through Loras College.

Help us go green - We are collecting email addresses of our donors and partners in an effort to deliver future communications electronically. If you would like to help us save paper, and postage, please email: office@dbqfoundation.org with Go Green in the subject line. If there has been any change to your address or phone, it is a great time to let us know.

Board Boot Camp - A curriculum to develop dynamic and effective nonprofit boards is now offered by the McCarthy Center for Nonprofits. Call us to arrange.

Feb. 25, 3:45 pm - Women's Giving Circle - Afternoon Enlight for Members and Guests at the Community Foundation. This offering features a panel of experts and then discussion about ways we can all help disabled individuals access transportation, housing, and workforce opportunities in Dubuque.

ENDOW IOWA

2009 Endow Iowa Tax Credits represent an incredible opportunity to give a gift of a permanent endowment through a qualified Community Foundation and receive a 20% State of Iowa tax credit over and above federal and state deductibility.

IRA Rollover

IRA Rollover gifts to endowments at the Community Foundation are also eligible for Endow Iowa, and represent perhaps the most strategic way to maximize the reach of charitable dollars.

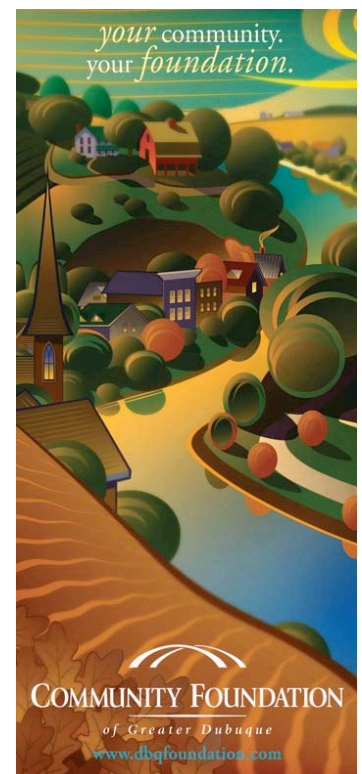
Serving Donors: New partnerships and memorials

New endowment partners

The Nicholas Fund (Care of our Furry Friends)
Opportunity Passport Endowment Fund (Foster Care)
Fairview Cemetery Field of Interest Endowment Fund
G and G Living Centers Foundation Endowment Fund
Tri-State Trail Vision (Bike Trail)
Farley Community Foundation Endowment Fund
Allamakee Dollars for Scholars Endowment Fund
The S.O.U.R.C.E. Endowment Fund

Endowed memorial gifts received

In memory of Grant Vogt for Grant Vogt Flight Scholarship Fund
In memory of Linda Troester for the Hunt Family Endowment
In memory of Bruce Lauritsen for the Bruce and Jeanne Lauritsen Fund
In memory of Mike Less for the Snyder Foundation Fund
In memory of Donald Lamker for Clayton County Foundation for the Future
In memory of Jeanne Piekenbrock for Crescent Community Health Center Endowment
In memory of Jean Stoltz for Hospice of Dubuque Foundation
In memory of Mary Kay Bondy for Holy Family Endowment



Strategic Grantmaking: Mississippi River Adventure Day



Full of breathless anticipation, about 200 kids and parents converged in Lansing one day last summer to begin an adventure on the Mississippi River.

Friends of Pool 9 hosted the event which introduced area children to pollywogging for mussels, seining for fish, and exploring the floodplain forest. The event included a backwater excursion into Lansing Big Lake to learn about commercial fishing and the importance of protecting this national treasure.

That summer day on the river will be a place these children and families return to in memory for years to come. The Allamakee County Community Foundation helped make the event possible and is

building a permanent endowment to strengthen non-profits in the county forever. The board of directors seek strategic grant opportunities which build community and capacity.

Applications for 2009 Grants are now available from the Allamakee County Community Foundation (www.allamakeefoundation.org), Foundation for the Future of Delaware County (www.delawarecountytia.com), and the Clayton County Foundation for the Future (www.claytoncountyiowa.com).

Community Leadership: Equipping caring adults to be mentors

Community Foundation CEO Nancy Van Milligen addressed more than 100 caring adults at the Mentoring Awareness Day on Jan. 19, urging participants to make a difference in the life of a child.



Brooke Sluiter, Project Concern

Caring adults are one of the five promises to be delivered through Dubuque's Every Child/Every Promise (ECEP) initiative.

Attendees at the workshop, coordinated by Mae Hingtgen, ECEP Executive Director, learned about foster grandparenting through Project Concern, an after-school homework program at St. Mark's Community Center, the Retired Senior Volunteer Program coordinated by Finley Hospital, becoming a Big Brother or Big Sister through Hillcrest, as well as classroom opportunities through Dubuque Public and Holy Family Catholic Schools.

Through community leadership initiatives like ECEP, the foundation addresses root causes of community concerns.

If every child in the region experienced the promise of a caring adult, consider the transformational change created.

The four remaining promises are:

- A healthy start
- Safe places
- Opportunities to serve
- Effective education

To learn about mentoring opportunities, contact Mae Hingtgen at 583-6893.

Look Inside....

- 🌀 Postponing endowment payouts recommended
- 🌀 Tara Nelson joins foundation staff
- 🌀 Serving Donors: New endowments and memorials
- 🌀 Strategic Grantmaking: Adventure on the River
- 🌀 Community Leadership: Equipping mentors



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Dubuque, IA 52001
Phone: 563.588.2700

Fax: 563.583.6619

Visit us today

www.dbqfoundation.org

NancyVanM@dbqfoundation.org



Confirmed in Compliance
with National Standards for
U.S. Community Foundations

Board of Directors

Jim Theisen, Chair
Theisen's Home Farm Auto

John C. O'Connor, Vice Chair
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Tim Conlon, Secretary
Conlon Construction Company

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McGladrey & Pullen, LLP

Stephen Juergens
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& Sudmeier, P.C.

W. R. Klauer
Klauer Manufacturing Company

David Wm. Rusk
Julien's Journal

Phil Ruppel
Retired Business Owner

Eldon Herrig
Herrig & Herrig

Jeanne Lauritsen
Womens Giving Circle Leader

On March 5 at 1 pm, a free grantseek-
ing workshop will be held in cooperation
with the Foundation Center. Call 588-2700
or visit www.dbqfoundation.org for more
information.



*Giving Matters is published by
the Community Foundation
of Greater Dubuque to promote
inspired philanthropy and help
make the place we call home a
better place to live.*

Dubuque Building, Suite 195
700 Locust Street
Dubuque, IA 52001



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Dubuque, IA

Gifts to The Backbone Lake Friends
Endowment Fund are accepted at the
Clayton County Development Office
132 South Main Street
Elkader, IA 52043

or

Mail your gift to:
Community Foundation of Greater Dubuque
700 Locust Avenue, Suite 195
Dubuque, IA 52001
563-588-2700
www.dbqfoundation.org



THE BACKBONE LAKE FRIENDS ENDOWMENT FUND

Established to protect a
watershed and restore a beloved lake



THE BACKBONE LAKE FRIENDS ENDOWMENT FUND

The Backbone Lake Friends Fund is an Endowed Fund held by the Clayton County Foundation for the Future, an affiliate of the Community Foundation of Greater Dubuque.

The fund's principle is forever endowed.

Distributions from the fund's interest are directed by the Backbone Lake Friends Board of Directors toward projects which protect the watershed and restore the lake.

Gifts to the fund are state and federal income tax deductible. In addition, gifts are eligible for Endow Iowa, a 20% state tax credit.

**TAKE TIME TODAY
TO CONTRIBUTE**

_____ Gift amount

Gifts of \$100 or more are eligible for Endow Iowa, a 20% State tax credit

Name_____

Address_____

Address_____

Phone_____

Email_____

Names of donors to the fund are published in the foundation's annual report.

_____ My gift is anonymous

Working together for the good of our communities

The Dyersville Area Community Foundation is committed to developing the spirit of philanthropy throughout the area by providing support and services to donors, volunteers, grant seekers and the communities of this area.

Grants are made once a year to local not-for-profit groups in the areas of:

- Community Betterment
- Education
- Arts & Culture
- Health & Human Services
- Recreation
- Youth Development

To receive a grant application
for your non-profit group,
call 563-875-2311.

*“Your gift can make a difference,
year after year.”*

Your support of this area
Community Foundation makes a
difference in your community.
Thank you for your loyal support!

For more information about how
you can support your community
in various ways through this
foundation,
please contact:

The Dyersville Area
Community Foundation
1100 16th Ave. Ct. SE
Dyersville, Iowa 52040
Phone: 563-875-2311



Make A Lasting Difference In Your Hometown



*“Improving our area communities,
one grant at a time.”*

Community foundations are "For good... Forever"

The Dyersville Area Community Foundation is a local non-profit organization that benefits the communities shown on the front of this brochure. This area foundation grants distributions from an endowed fund's interest for signature charitable projects that benefit area not-for-profit groups.

The fund's principle is forever endowed. So when a gift is given, it is not depleted, but allowed to grow and give forever and ever.

The Dyersville Area Community Foundation is an affiliate of the Community Foundation of Greater Dubuque. Funds are invested and managed professionally through this group for optimal results.

Gifts to the fund are state and federal income tax deductible; gifts of \$100 or more are eligible for Endow Iowa, a 20% state tax credit.



Grants have been dispersed by this organization to the following:

- \$500 to Luxemburg City Park
- \$500 to Hennessy School
- \$500 to St. Joseph's Child Care Center, Earlville
- \$500 to Commercial Club Park for Memorial Gazebo; \$500 to Commercial Club Park
- In Area - \$300 to Bi-County Ambulance for CPR mannequin
- \$200 to New Vienna Senior Center
- Sponsor organization of The Kid Project Community Child Care Center

*"Give a gift – leave a legacy –
in your hometown."*

Your gift can make a difference in the life of your community

Please consider:

- an **outright gift** to be used in the annual grant-making process or to grow the permanent endowment;
- other **specially planned gifts** which can help you achieve your charitable goals;
- a **bequest** from your estate as a lasting legacy of support for your community.

What you receive:

- A maximum state and federal tax deduction
- Contributions to the Foundation's permanent endowment qualify for an additional **20%**

Endow Iowa tax CREDIT

- Recognition at DACF's Annual Awards Night
- Recognition in the annual DACF report

How do I help?

Please make your donations payable to:
Dyersville Area Community Foundation

If you have any questions regarding your gift, contact any member of the Dyersville Area Community Foundation or call 563-875-2311.

Please consider including the Dyersville Area Community Foundation in your will!

Gifts to the Edgewood Future Fund
are accepted at the
City of Edgewood Office and
the Edgewood Chamber of Commerce

or

Mail your gift to:
Community Foundation of Greater Dubuque
700 Locust Avenue, Suite 195
Dubuque, IA 52001
563-588-2700
www.dbqfoundation.org



Providing grants to
improve community life
for our residents for ever

The Edgewood Future Fund is an Endowed Fund held by the Foundation of the Future of Delaware County, an affiliate of the Community Foundation of Greater Dubuque.

The fund's principle is forever endowed.

Distributions from the fund's interest are directed by the Edgewood Board of Economic Development for signature charitable projects which improve community life for our residents.

Gifts to the fund are state and federal income tax deductible. In addition, gifts are eligible for Endow Iowa, a 20% state tax credit.

**TAKE TIME TODAY
TO CONTRIBUTE**

EDGEWOOD FUTURE FUND

_____ Gift amount

Gifts of \$100 or more are eligible for
Endow Iowa, a 20% State tax credit

Name_____

Address_____

Address_____

Phone_____

Email_____

Names of donors to the fund are
published in the foundation's annual report.

_____ My gift is anonymous



NORTHEAST IOWA FUNDERS NETWORK

For sustainable communities



Meeting Notes for April 2, 2009 in Monona

Attendance: Matt Erickson (Allamakee), Roger Halvorson (Clayton), Scott Michelson (NEIFFI Leadership Team), Brenda Ranum (NEIFFI co-convenor), Mindy Gress (CFNEI), Tom Ridout (Winn.), Rick Edwards (NEIFFI Leadership Team), Nancy Van Milligen, (CFGD), Ann Mansfield (NEIFFI Co-Convenor), M.J Smith, (CFGD/Affiliates).

Absent: Peggy Kittleson of Fayette County, Dick Wagner of Howard County
Peggy and Dick both sent word they would be unable to attend.

FUNDING PARTNERS

Community Foundation
Of Greater Dubuque

Allamakee County
Community Foundation

Clayton County
Foundation for the Future

Community Foundation
Of Northeast Iowa

Fayette County
Community Foundation

Howard County
Community Foundation

Winneshiek County
Community Foundation

PROJECT MEMBERS

Northeast Iowa
Food and Fitness Initiative

EXECUTIVE OFFICE

700 Locust, Suite 195
Dubuque, IA 52001
Phone: 563-588-2700
Email: dev@dbqfoundation.org

1. The members introduced themselves and described their affiliations with the foundations and/or the NEIFFI

2. Ann and Brenda provided a brief history of the initiative to date.

3. Nancy led a discussion about the Funders Network name
Sustainability is one term that appealed to the group. The network can be broad at the outset, but all agreed to focus on the Northeast Iowa Food and Fitness Initiative as a singular initial project and focus. Consensus was reached around the name:

NEI Funders Network for Sustainable Communities

All participants were urged to reflect on the need and mission for the group, evaluating personal, community, and regional benefits for organizing a funders network. There was consensus around the potential benefits of organizing..

4. Membership

Will be limited to true funders and grant-makers at the outset as well as project leaders. Guests and other participants will be invited for selected discussions and education. Other funders may include bankers, donors, corporations, and gaming grant-makers.

5. Mission

The group adopted the Northeast Iowa Food and Fitness Initiative as its singular first project and seeks to:

- Learn more about the FFI initiative at the regional and community level
- Understand how each funders goals fit with the initiative
- Collaborate to support regional policy-focused approaches to meeting initiative goals
- Collaborate to leverage regional and national funding opportunities
- Support grant-making which reflects and leverages the work of the initiative

6. What is expected of funders and members?

The role of community foundation representatives will be to become educated about projects and funding opportunities and then officially communicate the network's business back to the county boards as well as bring the county board's needs to the network. If the appointed rep cannot attend, they should appoint a substitute. Community members with a passion for the network's project and/or mission would be eligible for membership as long as they reported back to the county boards. The appointments would be left up to the individual count boards.

7. Communication Strategies/Meetings

The Funders Network will be convened and supported by the Community Foundation of Greater Dubuque. The Network will communicate by telephone conference call quarterly with face-to-face meetings scheduled as needed or at important junctures in the initiative.

Website Links: www.dbqfoundation.org (Look for NEIFN communications to be posted under the AFFILIATES TAB)

8. Operating Budget

A Request for Activities of the network has been sent to NEIFFI. The request includes mileage stipends for participants as well as support for communications, printing and an annual workshop.

9. Next Meeting

The next meeting will be a phone conference at 9 am Thursday, June 4.

The agenda will include a report on the status of the NEIFFI Request for Activities in the five counties. The network will learn about those activities which reflect a regional approach.

HOMEWORK: The NEIFFI Grant Study (06-09) as well as a white paper, MOVING IDEAS and MONEY, have been provided to all participants.

Meeting notes by MJ Smith

APPENDIX F



Manchester Press Journal

County receives \$35,000 in Embrace Iowa funds

\$35,000 to be given out for disaster relief; Green Shirts coming to help

By Latisha Sand, Editor

The Delaware County Emergency Management recently received \$35,000 from Embrace Iowa to help with the flood and tornado damage that took place during the April, May and June months. This money is available to homeowners and renters who sustained home and personal property damage.

"Homeowners and renters may contact Operation New View to make an appointment and fill out an application," said Delaware County Emergency Management Director Mike Ryan. "We are looking at each individual situation."

For example, Ryan said that just because a resident doesn't live by a dry run or creek and they were still flooded, they could be eligible for funds.

"If you have 18 inches of water in your basement, it's still flooding no matter how it came in," he said.

The \$35,000 Embrace Iowa funds came from hundreds of small donations from around the region and nation. It was managed through the network of Community Foundations in Iowa and the successful application was hosted by the Community Foundation of Greater Dubuque, which is the host foundation for the Foundation for the Future of Delaware County.

Also this week, Monday, Sept. 22 through Friday, Sept. 26, the Christian Reformed World Relief Committee (CRWRC), also known as the Green Shirts, will be going around the county to help determine residents unmet needs from the recent flooding and tornado.

"They will be coming door-to-door to see what residents need," said Ryan. "They will tell the county exactly what people need, like how many screws and drywall pieces."

Ryan also wants residents with elderly neighbors or relatives who may have experienced flood damage to ask those elderly to see their basement to make sure it's OK. "If it's OK then it's OK but if not, we can help."

If the basement needs work, or if residents would like the Green Shirts to come to their home, they can call 563-920-5243 or 563-927-4629 after Friday, Sept. 26. To apply for the Embrace Funds, contact Operation New View at 563-927-4629 or stop by their office, located at 108 Tama St in Manchester, to fill out the three page application.

Ryan said it only takes 20 to 30 minutes to fill out the application and if a resident has applied for a service through Operation New View before, they have most of the information needed.

"As always, people should ask for identification before letting someone into their house and the Green Shirts will not try to sell them anything," said Ryan. "This group has been used in Buchanan County numerous times and have proven to be valuable in needs assessment."

CUTLINE: Pictured are (from left to right) Emergency Management Committee member Lori Wessels, Community Foundation of Greater Dubuque Director of Communications M.J. Smith, committee member Lori Cole, Emergency Management Director Mike Ryan and committee member Donna Smith.

Why Your Gift Matters

"Throughout my college career I relied on financial aid, grants, and student loans to help finance my education. Receiving the Dollars for Scholars scholarships helped me to purchase my books and provided other assistance as I pursued my education. I would like to thank the Dollars for Scholars Committee and sponsors for their generosity and for their continuing support of Waukon's seniors. You really are making a difference!"

A.G., 2000

"Dollars for Scholars has made college more affordable for me. It really helped me to afford expensive text books that are important to my major."

A.M., 2006

"Dollars for Scholars scholarships allowed me to take extra courses during the semester, which in turn is helping me to graduate a year early."

J.E., 2007

"With our present economy, many students are finding it difficult to go to school full time; the Dollars for Scholars gift monies will enable me to continue as a full-time student and allow me to fulfill my lifelong dream of becoming a teacher."

R.M., 2008

"Dollars for Scholars provides excellent opportunities for Waukon Senior High senior students to achieve their dreams of furthering their education. The scholarships that are awarded, help to financially support and commend seniors for their academics and extracurricular successes. I feel dollars for Scholars is an excellent program that hopefully can be continued for years to come."

M.L., 2005

Allamakee Dollars for Scholars

PO Box 144
Waukon, IA 52172

or contact:

Waukon High School Guidance Office
563-568-3466
www.allamakee.k12.ia.us

*Allamakee Dollars for Scholars is
an endowed fund of the*


COMMUNITY FOUNDATION
of Greater Dubuque

700 Locust St., Suite 195
Dubuque, IA 52001
Phone: 563.588.2700
www.dbqfoundation.org



Confirmed in compliance with national standards

Allamakee
Dollars for
SCHOLARS.



An
endowment to
encourage
local students
to reach for
and achieve
their
educational
goals.

What is Dollars for Scholars?

The Allamakee Dollars for Scholars is a locally operated and supported non-profit, tax-exempt scholarship foundation. Directed by an all-volunteer Board of Directors, the purpose is to expand access to educational opportunities for our students. This is accomplished by involving our community in the support and encouragement of our students.

Allamakee Dollars for Scholars is a chapter affiliate, through Iowa Dollars for Scholars of Scholarship America, a nationally recognized non-profit student and service organization.

Consider a challenge grant

In 2009 Dr. Ray Hermeier pledged \$10,000 to match donors gifts in a Dollars for Scholars telethon.

Why should I consider a gift to the Allamakee Dollars for Scholars?

Flexibility. Through a partnership with the Allamakee Dollars for Scholars, an affiliate of the Community Foundation of Greater Dubuque, nearly any type of gift can be accepted, from cash and real estate to stock and other appreciated assets.

Tax Benefits. Because the fund is held in a qualified community foundation, gifts of \$100 or more are eligible for Endow Iowa, a 20% state tax credit, in addition to the state and federal deductions for these gifts.

Professional management.

All funds are professionally managed to safeguard principal and provide a competitive investment return to benefit the community and its residents.

Impact. When life has been good to you and your family, it's good to give something back. Through this endowment, you can make a difference in the lives of our students and future leaders.

Allamakee Dollars for SCHOLARS

☐ I would like to speak to someone about making a gift to Allamakee Dollars for Scholars.

☐ I have enclosed a gift of \$

Name

Address

City

State, Zip

Email

Phone

Please make checks payable to:

CFGD/Allamakee Dollars for Scholars

Please mail your gift (along with this form) to:

**CFGD/Allamakee Dollars for Scholars
PO Box 902
Dubuque, Iowa 52004-0902**



Dr. Ray Hermeier offers challenge endowment gift to benefit Allamakee Dollars for Scholars



Another generous gift ... Dr. Ray Hermeier, a 1955 graduate of Waukon High School shown

The Allamakee Dollars for Scholars (ADFS) Board has completed legal requirements to establish an endowment as an affiliate of the Community Foundation of Greater Dubuque. The permanent endowment is separate from the ADFS annual scholarship fund and will be invested to provide support for scholarships which encourage local students to reach for and achieve their educational goals, and it will grow forever.

The Board is planning and conducting donor outreach activities to build the new fund and is excited to announce a challenge gift from Dr. Ray

above during a 2002 Hermeier of Iowa City. Dr. Hermeier, an alumnus honoring for his of the Allamakee Community School District, has generosity that offered an endowment gift of up to \$10,000 to made the all- match dollar for dollar those pledge donations weather track at collected during the upcoming telethon for the Waukon High annual scholarship campaign, which is set to begin School a possibility, Thursday, February 12.

is once again using During its 15-year history, Allamakee Dollars for his generosity to Scholars has awarded \$423,630 in scholarships to benefit his high 926 students. Students receiving the financial school alma mater. support have recently sent testimonials to the Hermeier has most Board, including the following:

recently donated a "Dollars for Scholars provides excellent \$10,000 challenge opportunities for Waukon Senior High senior endowment to the Allamakee Dollars Chapter to benefit students to achieve their dreams of furthering their for Scholars education. The scholarships that are awarded help the group's to financially support and commend seniors for scholarship fund. their academics and extracurricular successes. I feel Dollars for Scholars is an excellent program that hopefully can be continued for years to come." - M., 2005

"In May, 2000, I graduated from Waukon Senior High. It's hard for me to believe it's been almost nine years! I was involved in the Dollars for Scholars program during my senior year, and I was the recipient of two scholarships. Several years later, I received the alumni scholarship. After high school I attended the University of Northern Iowa and later received my MBA from Edgewood College in Madison, Wisconsin. I recently celebrated my five-year anniversary as an employee with

JohnDeere/John Deere Credit. Throughout my college career I relied on financial aid, grants, and student loans to help finance my education. Receiving the Dollars for Scholars scholarships helped me to purchase my books and provided other assistance as I pursued my education. I would like to thank the Dollars for Scholars Committee and sponsors for their generosity and for their continuing support of Waukon's seniors. You really are making a difference!" - A., 2000

Gifts to the Allamakee Dollars for Scholars Endowment are state and federal tax deductible and may be eligible for Endow Iowa, a 20% state tax credit. In addition, a law passed within the nation's financial rescue plan, allows individuals aged 70-plus taking required minimum distributions on their Individual Retirement Accounts (IRA) to share their retirement savings by giving it directly to charity. IRA Rollover gifts to charitable causes bypass income tax, and those gifted directly to foundation endowments may also be eligible for Endow Iowa, the 20% state tax credit.

The new endowment will be directed by board members Mary Jo Goodman, Colleen Gragg, Steve Grotegut, Donna Herman, Maynard Johnson, Mary Jo Kelly, Pam Larson, Sandy Lyons, Teresa Myers, Abbie Osterholm, Karen Regan, Julia Rotach, Barb Smed, Denise Tysland, Kim Winters, and Amy Wasson.

Board chair Julia Rotach said, "Through Dr. Hermeier's challenge gift and by establishing this permanent endowment, we look forward to working with families who might wish their scholarship gifts to achieve Endow Iowa tax savings and impact our students forever."

The Dollars for Scholars challenge gift is not the first time Dr. Ray

Hermeier has blessed the community. His previous gifts have included support for Waukon Athletics and the Waukon Wellness Center.

Allamakee Dollars for Scholars is a locally-operated and supported, non-profit, tax-exempt scholarship foundation. Operated by an all-volunteer board, the mission to expand access to educational opportunities for students is accomplished in partnership with the entire community. Persons desiring more information about the Allamakee Dollars for Scholars Endowment or assisting the local Allamakee Dollars for Scholars chapter may contact Mary Jo Goodman, 568-3417; Pam Larson, 568-3451; Amy Wasson, 568-3466; or Julie Rotach, 568-3754.

Related Links

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