



Pilot Program Staffing Support Grant/Funds

In November of 2007, the Iowa Council of Foundations (ICoF) and the Community Vitality Center (CVC) supported the Hardin County Community Endowment Foundation 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: Hardin County Community Endowment Foundation

Host Community Foundation: Community Foundation of Greater Des Moines

Host Community Foundation Main Contact: Carol C. Gilbert

Email: carolg@peconet.net Phone Number: 515-855-4170

Street Address: 19457 I. Ave. City, St, Zip: Iowa Falls, IA 50126

Individual Serving as Pilot Program Staff as a Result of Funding: Carol C. Gilbert

Email: carolg@peconet.net Phone Number: 515-855-4170

Briefly describe the structure of this arrangement (consultant, contractor, employee, etc.): contracted work with the Vitality Center, the Iowa Council of Foundations, the Community Foundation of Greater Des Moines, and the Hardin County Community Endowment Foundation

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): 20 hours/month

Signatures

President/CEO of Host Community Foundation

Individual Engaged as Pilot Program Staff

Date

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.

Summary Letter

1) "Job Description" – Please see attachment

2) Summary of successes & challenges:

- Enhanced capacity of Foundation through education, outreach, and grantmaking.
- Heightened the awareness of the power of giving and giving opportunities to and through HCCEF
- Created new partnerships with local donors, professional advisors, and social-profit organizations.
- Developed new marketing materials to increase visibility of HCCEF
- Increased assets, by increasing the number of donor designated/acorn/agency funds.
- Established 10 new funds this past year – all of which have utilized the Endow Iowa Tax Credit.
- Sponsored 3rd annual Grant Awards Night, with over 130 people in attendance
- Sponsored 3 new Foundation initiatives in the county
- Was one of three county to work on a pilot project to develop new web site – donateiowa.org/hardin
- Served as resource to other county foundations on projects, marketing materials, & best practices
- Was a spokesperson for philanthropy in the state to Iowa legislative committee
- Increased board knowledge and leadership
- Commitment of Board to financial support Foundation leadership and expenses

Challenges and items that were not successful:

- The greatest challenges in 2008 were the flooding crisis that touched so much of the state, the depressed economy, and the poor investment performance in the financial markets. Add to that job uncertainty, market instability, corruption in the business and investment world, and the change in presidential leadership. These factors all played a part in reduced charitable giving and created unique challenges for all foundations.
- It was very discouraging to see donors' endowments funds drop 20-30% in market value this year, especially when they were just established in 2007/2008 and try to aggressively promote endowment building.. We worked very hard to help donors look at the long term benefits of their giving.

3) Include suggestions and specific goals for a potential second year of the Pilot Program Staffing Grant/Funds.

- Develop a list serve to allow Pilot Project county to communicate easier with other affiliates
- Provide greater opportunities for county foundations to share success stories with other affiliates and to share those ideas and templates at affiliate meetings and in-between affiliate meetings.
- Increase education with professional advisors
- Serve as a greater resource to social-profit organizations for funding opportunities
- Write more grants to secure funding partners for HCCEF initiatives
- Develop 2 more initiatives
 - Consider underwriting with partners Live Healthy – Hardin County
 - Consider bringing performing group - Tonic Salsa to Hardin County for Thanksgiving/Christmas concert
- Attend at least one regional or national convention

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.
 - Enhanced capacity of Foundation through education, outreach, and grantmaking.
 - Heightened the awareness of the power of giving and giving opportunities to and through HCCEF
 - Our motto " Live here...Give here.. " reminds individuals, families, businesses and social-profit organizations that supporting our communities both today and tomorrow is importing – and this is really hitting home in Hardin County.
 - Did 8 radio interviews throughout the year on KDAO and KIFG
 - Had over 30 newspaper articles in county newspapers throughout the year – samples included
 - Sent out e-mail notices on extended IRA rollover charitable giving to professional advisors
 - Spoke at Hardin County Mayors & Supervisors quarterly meeting
 - Spoke to 7 organizations & gave to every member in attendance a newspaper tab and a booklet on HCCEF – sample included
 - Spoke to Iowa Falls Leadership Training Class on HCCEF
 - Developed amortization sheet to help donors understand their returns on a \$10,000 gift with a 4%, 6%, and 10% investment returns
 - Created new partnerships with local donors, professional advisors, and social-profit organizations.
 - Visited one-on-one with 8 professional advisors this year and provided them with a resource file on HCCEF and with acrylic stands that held HCCEF brochures
 - Visited with the three Economic Development Directors in the county about HCCEF services and grant opportunities
 - Had resolution passed by County Supervisors on Philanthropy Month
 - Met with Regional Farm Bureau representatives and received 40-page report on East Central Iowa Region's Rural Vitality Blueprint for Success.
 - Met with 8 social profit organizations to discuss Agency Funds
 - Sent Christmas cards to all donors to HCCEF
 - Worked with Brandon Shaw at the USDA Office about Rural Development Grant opportunities, learned about each others grant opportunities, and how we can share grant resources with social-profit organizations
 - Developed Excel file on the names, addresses, phone numbers, and e-mails of all social profit organizations and their board members.
 - Visited all grant recipients and took pictures of projects
 - Periodically sent e-mails to Hardin County social profit organizations about trainings, grant opportunities and HCCEF sponsored events
 - Invited largest female donor to attend Women in Philanthropy Conference – Ames
 - Sponsored two grant workshops for the 3 year in a row
 - Developed new marketing materials to increase visibility of HCCEF
 - Wrote articles, took pictures and worked with Times Citizen on developing 3rd annual newspaper tab that was also inserted in the Ackley and Eldora newspapers – sample included
 - Had news releases in newspapers around the county – samples included
 - Guest editorialist for Times Citizen on Rural Philanthropy & HCCEF
 - Updated brochures & put them in libraries, coffee shops, & professional advisors offices– samples included
 - Developed 2008 Agency Endowment brochure – sample included

- Developed table tents for all restaurants, coffee shops, and libraries in the county – sample included
 - Created book marks – sample included
 - Created business cards for board members – sample included
- Increased assets, by increasing the number of donor designated/acorn/agency funds.
 - Established 10 new funds this past year – all of which have utilized the Endow Iowa Tax Credit.
 - Received first corporate matching fund this year from Thrivent Financial
- Sponsored 3rd annual Grant Awards Night, with over 130 people in attendance
 - Had photo show on grant recipients from 2007 on screen as people came in
 - Developed program booklet for all in attendance – sample included
 - Provided media packets for all press – sample included
 - Had name tags for all in attendance
 - Ashley Canney was guest speaker
 - Two local social-profit organizations had power point presentation on their organization and grant funds by HCCEF
 - Granted to 24 social-profit organizations throughout the county. Seven grants were awarded to county-wide organizations and 17 grants were awarded in 7 different communities. 43 grant requests were reviewed by the board with a total request of \$128,424.
 - A board member spoke 2 minutes on each grant recipient – sample copy included
 - Refreshments were served following awards program
 - Developed Excel sheet to look at total grants given in the last 3 years, comparing them to population distribution of each town in the county. The Excel form has the opportunity to break down grants according to years given, focus areas, and community or county organization.
- Sponsored 3 new Foundation initiatives in the county
 - Co-sponsored a 6 evening county-wide leadership training with 25 participants – information included
 - Brought in a Lincoln re-enactor for a two-day county-wide Lincoln Bi-Centennial celebration in all schools in the county, had recognition of Lincoln at the Court House, and sponsored “An Evening with Abraham Lincoln” for the public – sample news releases, poster, pictures and program included
 - Had resolution passed by County Supervisors to honor Lincoln's Bicentennial.
 - Collaborating with Ellsworth Community College and Union schools on a new pilot project in Hardin County entitled Entrepreneur for A Day for 5th graders – sample program included
- Was one of three county to work on a pilot project to develop new web site – donateiowa.org/hardin
 - Created business cards to promote new web site – sample included
- Served as resource to other county foundations on projects, marketing materials, & best practices
 - Shared marketing materials and best practices at the ICAN quarterly meetings, at foundation trainings, and through one-on-one contact with other County Foundations
 - Helped other foundations with the idea to print book marks
 - Helped other foundations with the idea to develop a newspaper tab
 - Helped Grundy County with Lincoln centennial resources
 - Helped Story County with Lincoln resources
 - Spoke to the House Economic Committee on the County Foundation and Endow Iowa Programs

- Increased board knowledge and leadership
 - Attended all quarterly affiliates meetings
 - 7 of the 15 board members attending one or more of the board and affiliate training meetings and/or listened to web conferences throughout the year.
 - Increased commitment of Board to financially support Foundation leadership and expenses
 - Developed annual budget each year and Treasurer tracks all expenses according to budgeted items
 - Board pays for registration for all board members to attend leadership training
 - Board pays for mileage to leadership training meetings
 - Board pays \$10 per month for cell phone for Board Chair
 - Board pays for mileage for board member to speak outside of their community on behalf of HCCEF, and/or mileage for Board Chair to work with donors or represent HCCEF at any function.
- 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).
- The \$10,000 grant from the Iowa Council of Foundations and Community Vitality Center for staffing was gifted back to the Hardin County Community Endowment Foundation (HCCEF) as a Designated Fund by Charlie and Carol Gilbert to benefit the programs/services/operations of HCCEF.
 - The grant served to enhance the opportunity for the Board Chair to put in over 25 hours/week to lead the board, to promote philanthropy in Hardin County, and to be a resource to other foundations.
 - The grant increased leadership of the chair and all board members; and encouraged all to step up. With this wonderful opportunity, board members responded by saying “yes” to new ideas presented, saying “yes” to time and money given to HCCEF, by saying “yes” to being a more visible representative in their community. All the successes and achievements listed above certainly are a result of the Pilot Project grant.

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.

- Increased assets, by increasing the number of donor designated/acorn/agency funds. Just a few short years ago in 2004, we had \$62,000 in assets. Today we have over \$738,000 in public investments to our funds, of which over \$505,000 is permanently endowed.
- \$50,000 to Donor Designated Fund by Dr. Lloyd & Jo Bates
- \$10,000 endowed gift by Charlie and Carol Gilbert
- \$3,000 Todd & Jennifer Bicknese Family Acorn Fund
- \$2,745 Nancy Wessels Acorn Fund
- \$10,000 Agency Fund by Quakerdale
- \$10,000 endowed gift by Campbell Supply Scenic City Empress Boat Club
- 10,000 endowed gift by Campbell Supply for Barlow Memorial Library Endowment
- \$10,000 endowed gift by Campbell Supply to existing scholarship Endowment
- \$10,000 endowed gift by Kent & Lori Krause
- \$1,000 to Lloyd & Jo Bates Fund
- Working on :
 - \$10,000 endowed gift from Toni Boeke, Hubbard for Library Endowment
 - \$20,000 endowed gift from Lloyd & Jo Bates, Union Cemetery of Union

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.

- At this time, the Foundation has no knowledge of any planned gifts that will be received. Our goal is to visit one-on-one with all professional advisors in the county, to be a resource to their clients in charitable giving,

and to provide them with a resource file on HCCEF. These efforts are all designed to encourage Legacy giving to HCCEF.

- HCCEF is currently working with two donors on additional donor designated gifts
- An Excel sheet has been developed to track donors' contribution and a file has been made on every donor, grant recipient, social-profit organization, and professional advisor visited.
- c) Provide additional comments as to accomplishments in the area of asset development for the Community Foundation/s involved in the Pilot Project Program.
- It has been a very exciting year for HCCEF, not only with growth in the number of funds established, but also in the asset development of leadership in the county, collaboration, and in terms of credibility of how we provide services to donors, professional advisors, and social-profit organizations.

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.

- The grant confirmed the belief that paid part-time staffing is needed to help county foundations be what they truly can be. It definitely takes time, constant relationship building, training, networking, immediate responses to requests, on-task follow-through, record keeping; along with commitment, passion, and knowledge of philanthropy. A volunteer board cannot and will not always provide what is needed, when it is needed for the success that is wanted.
- Value of staffing. I feel local resource and talent with someone within the county is definitely more important to the growth and success of a county foundation than working with a paid consultant or someone who visits the county. Those talents and skills must include marketing, strong verbal and written communication, knowledge and competence of word, Power Point, Excel and Publisher.
- Sustainability for a part-time professional would definitely advance the community affiliate organization and endowment building program.

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).

- The Campbell Supply Company Inc. of Iowa Falls has been a tremendous partner in building philanthropy in Hardin County. Their first Designated Fund established a scholarship for the Iowa Falls Alden High School with a gift of \$10,000 in 2007. They added another \$10,000 to that scholarship in 2008. In addition, Campbell Supply Company established a Designated Fund to benefit the Scenic City Empress Boat Club with a gift of \$10,000. The fund carries the name of the Boat Club with the goal that this is just another tool in their tool box for donor support to this very important tourist attraction and community building.

Also in 2008, Campbell Supply Company established their 3rd Designated Fund to benefit the Barlow Memorial Library of Iowa Falls. This fund carries the name of the library and provides the library with long-term funding support.

Campbell Supply Company is definitely a community leader and truly understands the power of endowments. While most social-profit organizations work very hard to meet their yearly financial needs, this donor has provided the funding to establish an endowment fund that now can accept gifts of all size. Not all donors have \$10,000 to be able to designate their endowed gift, so now two more social-profit

organizations have the opportunity to accept endowed gifts through HCCEF and donors can take advantage of the Endow Iowa tax credit.

- o Another success story is our leadership and collaboration with the Pappajohn Center at NIAAC, Ellsworth Community College, the school district of BCLUW and HCCEF to start an Entrepreneur for a Day (E4D) program for 5th graders in Hardin County. This innovative idea came about because of the support Mitchell County Foundation gave to the Pappajohn Center for such a program in Mitchell County. Both fifth grade classes in the BCLUW school system will experience the E4D in May. Next year, it is our hope to collaborate with the three Economic Development Groups in Hardin County, bankers, and local businesses to offer this program to all fifth graders in Hardin County.,

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