



CONNECTION  
COLLABORATION  
COMMUNITY

2024 REPORT TO THE COMMUNITY

Dear Community Foundation Friends,

Donors throughout Iowa continue to rise to the occasion with an invested vision for the future. As we reflect on the achievements of 2023, we also aim to be future-forward. The Community Foundation is on a solid trajectory as we continuously strive to improve quality of life for all.

Throughout the last two years, the Community Foundation Board of Directors and staff team worked together to lay the framework for the future of our organization. We listened to the voices of our stakeholders and remain committed to our mission, growing philanthropy, engaging partners and being bold in using our influence to make meaningful change in the communities we serve.

We are excited to share our vision for the future with our 2024-2028 Strategic Framework, which will:

- Build upon our strong foundation;
- Grow greater giving; and
- Drive community change by strengthening our nonprofit sector, leveraging our influence and providing leadership in our community.

Additionally, we will solidify our role as a trusted community partner and charitable giving expert. As a distinguished center for charitable giving and legacy planning, we will:

- Offer personalized resources and expertise to maximize charitable giving;
- Cultivate authentic donor relationships; and
- Shape strong communities in the 46 counties and communities we serve throughout Iowa.

This work will be informed by our guideposts and we look forward to the challenge — furthering the good work in the communities we are proud to call home, serving as your Community Foundation, positioned for continued growth and stability into the future. We feel confident in striving to reach the aggressive vision we've set for the future, with a continued focus on

## **CONNECTION, COLLABORATION AND COMMUNITY.**

On behalf of our board and staff, I'm so grateful that you have chosen the Community Foundation of Greater Des Moines as a partner as you continue to give where you live. We look forward to serving you, providing services that are uniquely yours and together, responding to pressing challenges and promising opportunities today and tomorrow.

Sincerely,



Kristi Knous, President



## OUR MISSION:

The Community Foundation of Greater Des Moines improves quality of life for all by promoting charitable giving, connecting donors with causes they care about and providing leadership on important community issues... *we're simply better together.*

## OUR GUIDEPOSTS:

**We embrace and embody diversity, equity and inclusion** throughout the Community Foundation to ensure we are building communities where ALL people have the opportunity to flourish.

**We connect, inspire and ignite generosity** to solve our community's most pressing issues and promising opportunities.

**We leverage our influence** to drive community change.

**We believe and invest** in our nonprofit sector and seek to amplify their impact.

**We strive to be an approachable partner** and authentic collaborator, building connections and relationships for greater impact.

## Our Success is Measured by:

**1 Greater giving** throughout the region

**2 Systems change and transformational impact** from our grantmaking

**3 Vibrant and thriving nonprofit sector** improving quality of life for all

**4 Strong and visionary** Community Foundation positioned to grow into the future



## GREATER GIVING



### CHARITABLE GIVING AND DONOR ENGAGEMENT

We offer *personalized and donor-centered solutions* to inspire and maximize charitable giving.

We implement *tailored strategies* among donors and professional advisors to grow giving while cultivating connections and strong relationships with new and existing communities of givers.

We encourage and empower donors to *connect with causes* they care about and understand our community's most pressing challenges and promising opportunities.

## BETTER TOGETHER



### COMMUNITY LEADERSHIP, CAPACITY BUILDING AND GRANTMAKING

We leverage our influence to *drive community change* by activating stakeholders to collectively solve critical community issues.

We strengthen the nonprofit sector to most effectively *serve the community*.

Investments from our Better Together Funds catalyze and challenge Greater Des Moines to *impact systems change*, and significantly impact community outcomes and opportunities.

## STRONG FOUNDATION



### INFRASTRUCTURE

We believe strong communities start with a *strong foundation* and commit to innovation, stewardship and investing in our people, systems and potential.

## STATEWIDE IMPACT



### AFFILIATE PROGRAM

We *grow and foster charitable giving* in Iowa by engaging local stakeholders as partners in promoting charitable giving, providing community leadership and making strategic grant investments.





We offer personalized and donor-centered solutions to inspire and maximize charitable giving.

OVER   
**\$79.2 M**  
in GIFTS  
contributed  
to Charitable  
Giving Funds

IN 2023

Farming isn't just a hobby to Norm Verros, he grew up on a farm, and you could say it is in his blood. Quite simply, a way to get out in nature and relax.

After returning from a stint in the Army Reserve, Norm settled down with his sweetheart Lorraine in Pella, and spent nearly 40 years dedicated to his work as the second-ever engineer for Pella Corporation.

Even holding down a full-time job didn't keep him out of the fields. Over time, Norm purchased and acquired more than 200 acres for farming — a dedicated practice he embraced on evenings and weekends. With new machinery and help from his brother during planting and harvest, Norm continued to pull double-duty until he retired from Pella Corporation at the age of 60. That's when this hobby of farming turned full-time. At the age

of 87, Norm still found himself enjoying the work, but ready to slow down.

Working with his trusted professional advisor, Norm anticipated the tax consequences of personally selling his farm machinery and recapturing its depreciation. Instead, as part of his charitable planning, Norm strategically gifted the farm machinery to the Community Foundation for the benefit of a new donor advised fund. The Community Foundation sold the machinery and placed the proceeds into Norm's new fund, where he can now make distributions to causes he cares about.

While Norm may have officially retired, you can still find him on the farm, where he will likely be providing lawn services, and just maybe, finding time to relax.



We implement tailored strategies among donors and professional advisors to grow giving while cultivating connections and strong relationships with new and existing communities of givers.



“

We want to support the community we've made our home. It enriches everyone's lives to have a strong, vibrant community and we want that to continue into the future, so we have trusted the Community Foundation with our estate plan. The organization is an expert steward of resources because of its charitable planning and strong management. Through our personal experience, and working with the Community Foundation's knowledgeable staff, we are able to share best practices with Rachel's clients to formulate philanthropic priorities for the future. We know the Community Foundation will continue to be here to make a lasting impact, carrying out charitable legacies that enhance quality of life for all.

— RACHEL STAUFFER & JIM LAWSON



“

Being able to connect with the Community Foundation about what is going on in the community is invaluable as an advisor and a fund holder. We don't know all the nonprofits that exist or all the ways our family and clients can impact the community we live in, but they do. It's exciting to go to events where people are enthused about giving to others in the community. There are not many organizations that focus so strategically on how you can serve and be leaders in the community to give back and help others.

— ADAM & DENISE OBRECHT

# A TEAM APPROACH

## PARTNERING WITH TRUSTED PROFESSIONAL ADVISORS

*Professional advisors partner with us to best serve their clients, and in some cases, implement their own charitable giving legacies as well.*



Collaborating with the Community Foundation to establish our own charitable giving fund has allowed us to support charities important to our family, both now and in the future. Additionally, clients appreciate the Community Foundation's purpose-driven alignment and joy they feel in giving back. Generally, they view themselves as part of their community – proudly giving time, assets or both. We value partners like the Community Foundation that assist in maximizing giving.

— TED & GEORGETTE LONGNECKER



We have been impressed by the services the Community Foundation offers and their knowledge of the community's needs. When we started our family, we knew it was important to teach our children the value of giving back to the community. Our donor advised fund is mainly supported through gifts of grain from our family farm. The Community Foundation makes it easy to provide contributions quickly and efficiently. It has been tremendously rewarding, both personally and professionally, to work with the Community Foundation.

— ERIN & RYAN SWALWELL

85

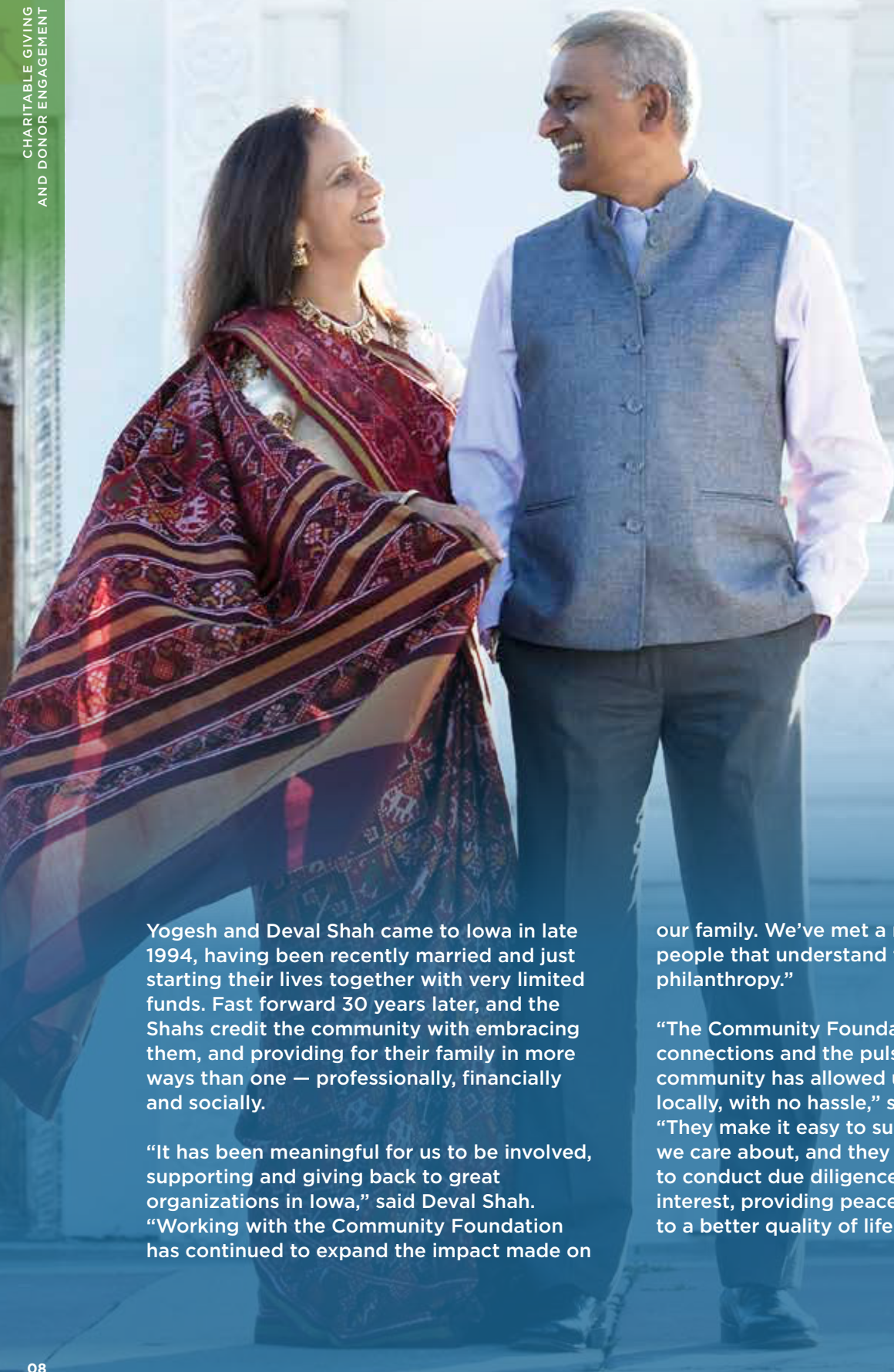
Charitable Investment Partners helped to grow their clients' charitable assets



IN 2023



We encourage and empower donors to connect with causes they care about and understand our community's most pressing challenges and promising opportunities.



MANAGED 

**2,543**

Charitable  
Giving Funds

IN 2023

Yogesh and Deval Shah came to Iowa in late 1994, having been recently married and just starting their lives together with very limited funds. Fast forward 30 years later, and the Shahs credit the community with embracing them, and providing for their family in more ways than one — professionally, financially and socially.

“It has been meaningful for us to be involved, supporting and giving back to great organizations in Iowa,” said Deval Shah. “Working with the Community Foundation has continued to expand the impact made on

our family. We’ve met a network of like-minded people that understand the importance of philanthropy.”

“The Community Foundation’s staff, their connections and the pulse they have on the community has allowed us to make a difference locally, with no hassle,” said Dr. Yogesh Shah. “They make it easy to support the charities we care about, and they have the capacity to conduct due diligence on new charities of interest, providing peace of mind, in addition to a better quality of life for all.”






OVER   
**\$62.1 M**  
in GRANTS  
made from  
Charitable  
Giving Funds

IN 2023

Through their mutual love of volunteering, Tim Hickman and Frank Vaia were familiar with the Community Foundation and its impact on the nonprofit sector. While their gifts of time have contributed to the community, they wanted to be further educated to learn more about the greatest needs in the community.

“We opened our charitable fund as a way to both maximize and organize our giving,” said Frank Vaia. “Through the relationships the Community Foundation fosters with nonprofits, we have been able to use our donor advised fund to further expand the impact of our philanthropy, both now and into the future.”

“Having the structure in place that allows us to be intentional about giving for a specific purpose is powerful – and you don’t need large sums of money to get started,” said Tim Hickman. “While the time we’ve spent volunteering has given back to us abundantly, there is real benefit to working with the Community Foundation and their approachable staff when it comes to our giving. They keep us informed about our financial investments and the giving opportunities that exist at any age or stage.”

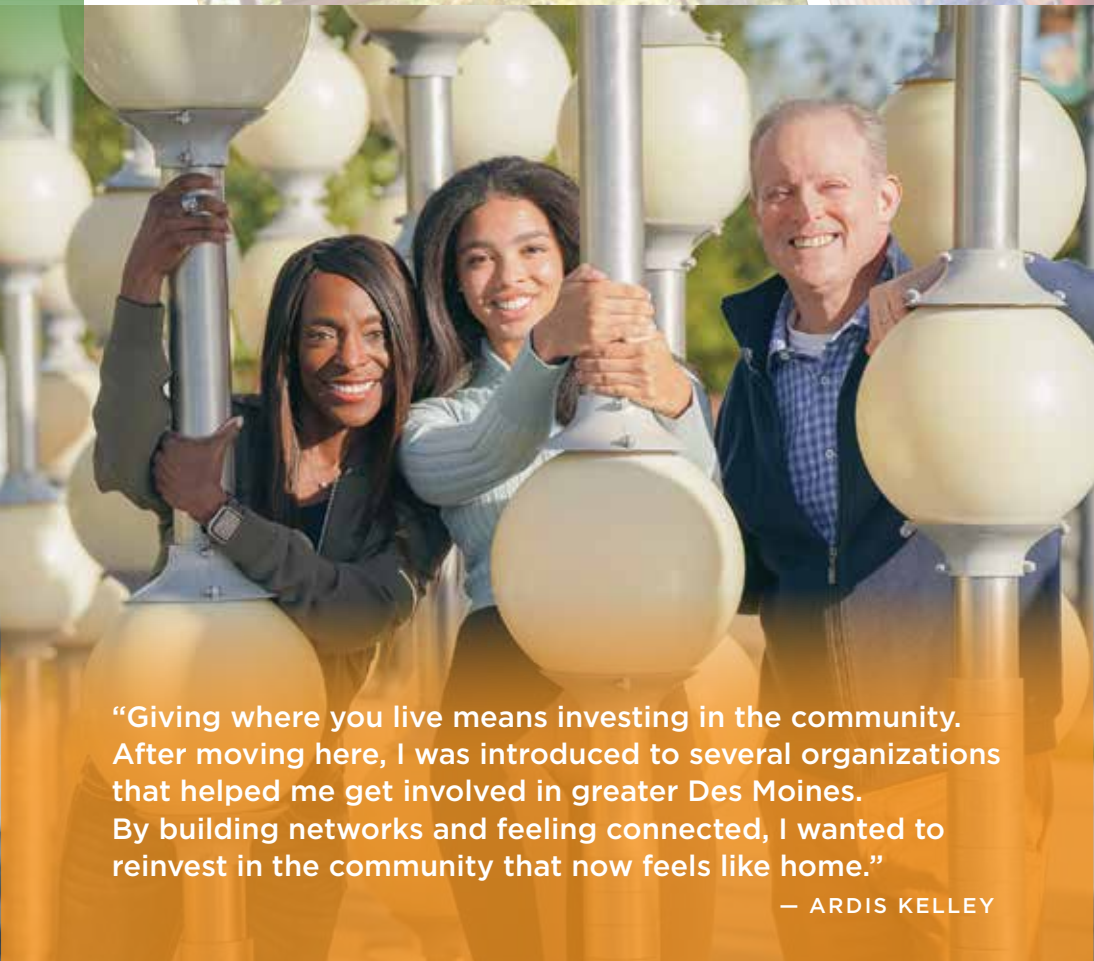
3,260   
CHARITIES supported  
from Charitable  
Giving Funds

IN 2023

# GIVE where you live

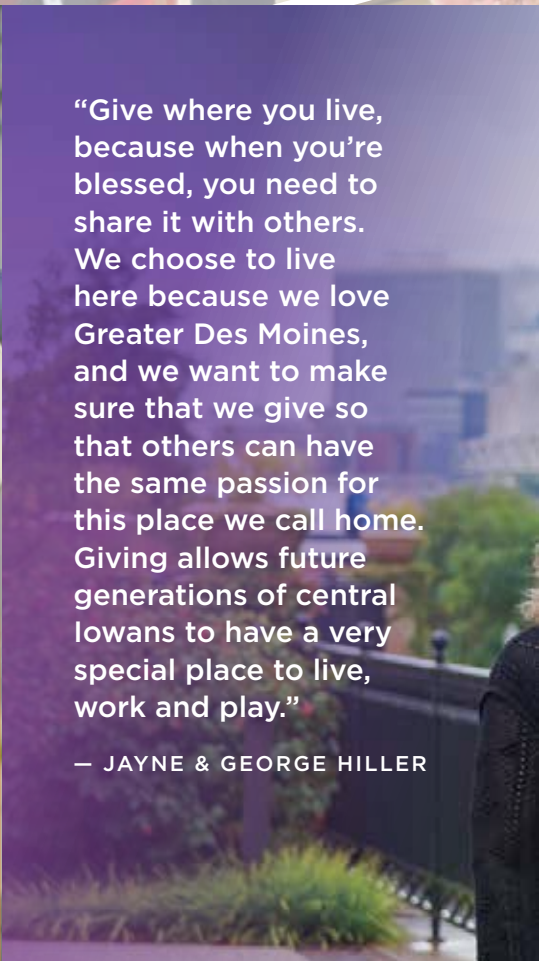
When your heart leads you to give back to the causes you care about, the Community Foundation is a local partner to help grow your impact and make giving easy.

GIVE  
where  
you



“Giving where you live means investing in the community. After moving here, I was introduced to several organizations that helped me get involved in greater Des Moines. By building networks and feeling connected, I wanted to reinvest in the community that now feels like home.”

— ARDIS KELLEY



“Give where you live, because when you’re blessed, you need to share it with others. We choose to live here because we love Greater Des Moines, and we want to make sure that we give so that others can have the same passion for this place we call home. Giving allows future generations of central Iowans to have a very special place to live, work and play.”

— JAYNE & GEORGE HILLER

GIVE  
where  
you live



ere  
live

GIVE  
here

GIVE  
where  
you



“When we had kids it was really important for us to teach them the value of giving back. Whether it’s with your time, your treasure or your talents, all of us can make an impact one way or another.”

— MEREDITH & JR BOESEN

GIVE  
where  
you live



Giving helps make Iowa communities better together, forever.





We leverage our influence to drive community change by activating stakeholders to collectively solve critical community issues.

Since 2011, the Community Foundation, together with fellow sponsor organizations, brought community stakeholders together to create a dynamic and comprehensive vision to leverage our region’s key advantages while addressing our challenges. From this, Capital Crossroads began. Credited with hundreds of successes, Capital Crossroads has set the stage for what our region can achieve through coordinated efforts. The Community Foundation continues to serve as a key stakeholder and funder of Capital Crossroads, leading the way in bringing the community together in pursuit of aligned goals.



The Regional Council of Capital Crossroads drives implementation of the Capital Crossroads Roadmap; a focused, ambitious and achievable vision for Central Iowa through 2040.

Capital Crossroads creates impact and inspires action by creating a shared regional vision; convening stakeholders to elevate ideas; catalyzing impactful, large-scale initiatives; coordinating aligned efforts across communities; and celebrating and communicating successes and work in progress.

## CRITICAL OUTCOMES

<b>REGIONALISM:</b> Collaboration among communities to address challenges and promote economic development.		<b>EQUITY &amp; INCLUSION:</b> All people have equitable access to resources, opportunities and benefits that foster inclusion, prosperity and regional growth.	
Placemaking	Workforce Housing	Job Growth	Education
<p style="margin-top: 10px;">Using an integrated and strategic approach, leaders develop public spaces as a regional portfolio to maximize accessibility and promote diverse and inclusive use.</p>	<p style="margin-top: 10px;">Workforce housing that meets demand, aligns with regional employment and is conveniently located near jobs, ensuring accessible housing options for the workforce.</p>	<p style="margin-top: 10px;">A curated network of career pathways that strategically attract, retain and advance top talent globally, fostering ongoing innovation, job growth and a thriving workforce.</p>	<p style="margin-top: 10px;">Comprehensive education and high-quality childcare that prepares the next generation to flourish in the evolving workforce of the future.</p>

The Capital Crossroads Roadmap serves as a platform to connect diverse stakeholders and unite their efforts across four Capital Crossroads Cornerstones: **Economic Opportunity and Prosperity**; **Community and Cultural Connections**; **Thriving Neighborhoods**; and **Youth Investment**.



“The Community Foundation has been a long-time supporter, making significant investments and exercising their influence to make the Capital Crossroads Roadmap a reality. Their involvement has been critical to the region’s future success,” said Dan Houston, chairman, president and CEO of Principal Financial Group and chair of Capital Crossroads.

“The Roadmap is one of the most collaborative regional plans to date and it sets a new standard of visioning. I’m looking forward to putting the plan into action and seeing the impact it will make for our region’s future generations.”

### ECONOMIC OPPORTUNITY & PROSPERITY

- Job Growth
- Entrepreneurship & Innovation
- Immigrants, Refugees & New lowans
- Leader in Agriculture

### COMMUNITY & CULTURAL CONNECTIONS

- Cultural Celebrations
- Parks & Recreation
- Artistic & Creative Expression
- Attractions & Amenities
- Culinary Art

Our region is focused on attracting and building the economic foundations for future opportunities as well as the human capital that will be needed for them to succeed.

Our region is renowned for its diverse communities, natural resources and thriving cultural and recreational opportunities that are accessible, integrated and enhance the area’s creative vitality.

All residents have access to housing in clean, safe and connected neighborhoods with access to necessary services and amenities.

Our region is among the premier areas of the country for raising a family where parents have the support to put their children on a path to success through a robust, equitable and varied educational ecosystem.

### THRIVING NEIGHBORHOODS

- Workforce Housing
- Mobility
- Water Quality
- Sustainability

### YOUTH INVESTMENT

- Childcare Services
- Early Childhood Education
- Career-Ready Learning



Scan here to learn more.





We strengthen the nonprofit sector to most effectively serve the community.

ENGAGED OVER

950

individuals through Community Foundation trainings & conversations



IN 2023



I'm really invested in building a network of people who are like-minded, working toward common goals within our community.

— LELA SCOTT  
2024 For Impact Leaders Cohort



I've gained so much knowledge, and feel better equipped with necessary resources, allowing me to be a better leader.

— AJ SALINAS  
2023 For Impact Leaders Cohort



The Community Foundation is focused on building a vibrant and thriving nonprofit sector through capacity building. In 2023, new opportunities launched to serve the most pressing needs and promising opportunities:

### FOR IMPACT LEADERS

A 9-month cohort for emerging nonprofit leaders to learn and grow together.

### COLLEAGUE CONNECT

A series of monthly networking opportunities for nonprofit staff serving in various roles.

### C3 CENTER

A hub for nonprofit and charitable giving sectors that includes space for meetings, trainings and community convenings.



**Colleague Connect is a safe space for community thought leaders to share struggles and celebrate victories.**

— KELLY SHROCK  
*Colleague Connect Participant*



**Getting people together who have different backgrounds and experiences provides an authentic opportunity to share, connect and build trust.**

— JESSICA NELSEN  
*2023 For Impact Leaders Cohort*



**To have everyone in the community agree and commit to working together in a collaborative ecosystem, we can begin to realize a reduction in food insecurity and remove barriers to food access.**

— PATTY SNEDDON-KISTING  
*Food Insecurity Panelist, C3 Center Convening*





Investments from our Better Together Funds catalyze and challenge Greater Des Moines to impact systems change, and significantly impact community opportunities and outcomes.

## FIVE FIRES FOUNDATION and THE YMCA OF GREATER DES MOINES

The 100+ year-old Y Camp in Boone is a beloved location, filled with fond memories created over the last century. When the location came up for sale, a group of generational camper families felt a strong sense of responsibility to continue to provide programming for campers for years to come. Through a **Strategic Alignment Grant** provided by the Community Foundation, Five Fires and the YMCA of Greater Des Moines worked together to sustain the Y Camp, investing in future generations of campers.

“With both organizations sitting together at the same table, clarity was provided around what the Y Camp should look like in the future,” said Meredith Boesen, treasurer of the Five Fires Foundation. “It was incredibly helpful to work together as a team, build upon the great foundation of the YMCA, and identify mutually beneficial goals and attainable, bite-sized benchmarks.”



“We really are better together,” said Cameron Nicholson, president and CEO of the YMCA of Greater Des Moines. “Our aligned values and open communication have provided structure to not only sustain the camp, but address necessary improvements, including riverbank stabilization and the addition of Wi-Fi. These projects have afforded us new opportunities, like welcoming special needs populations to camp. We will forever appreciate the collaboration with the Community Foundation at a time when we really needed each other to find a sustainable solution for the future of this valuable community asset.”

## OAK STUDIO

### A Best Buy Teen Tech Center at Mainframe, powered by Wellpoint

Through **Leadership Grant** funding provided by the Community Foundation, Oak Studio was realized. At Oak Studio, young people ages 13 to 21 can experience free, self-guided programming, which includes music production, robotics, videography, coding and so much more.

The space is designed for participants to explore their passions and connect with career professionals to cultivate lifelong skill sets. Many of the youth have discovered profound interests in technology, setting their sights on careers in various emerging industries, whether as employees or aspiring entrepreneurs. Oak Studio helps build technical acumen and fosters the essential soft skills necessary for success in any career path their patrons may choose.

“Oak Studio is leveraging the potential of the Greater Des Moines community, with teens coming from all different areas, schools and suburbs,” said Derek Frank, coordinator at Oak Studio. “It engages young people and volunteers, uniting them through a common desire to leverage creativity and technology to inspire a future full of possibilities. It’s inspiring to see the connections made and the potential cultivated.”





## HEALTHY BIRTH DAY

Healthy Birth Day is frequently known for Count the Kicks, the mobile app that allows expecting mothers to count their baby's kicks, notice changes in movements and in some circumstances, help prevent stillbirth.

"Healthy Birth Day is uniquely Iowa, and it couldn't have started anywhere else but here," said Emily Price, CEO of Healthy Birth Day. "Iowans believe you can do big things together and rally to provide support. The return on impact simply can't be measured — it equates to the lives of hundreds of babies and mothers saved. What started as an Iowa-grown effort, is now realizing results in more than 36 states across the country."

The rapid growth of Healthy Birth Day could have been unsustainable, but working with the Community Foundation on **capacity building** has allowed the organization to realize smart growth.

"It's helped build a strong culture, with a focus on our leaders and their professional development, in a fast-growing environment," said Price. "It has also allowed us to focus on health equity and make a meaningful difference in better serving women who face racial disparities in maternal health, ultimately helping save lives."

## CAPACITY BUILDING GRANTS

As nonprofits focus on strengthening overall governance and management, the Capacity Building Grant program provided 20 grant awards for strategic planning, succession planning, fund development planning and more.

## STRATEGIC ALIGNMENT GRANTS

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



# Better Together Fund Impact

Through the generosity of donors to the Better Together Fund, the Community Foundation can take a nimble approach to address pressing needs and promising opportunities, provide leadership on important community issues and support critical work that improves the quality of life for all. The **Leadership Grant** program, funded by the Better Together Fund, provided the following grants to projects making a significant impact on our community.

## BALLET DES MOINES

### Campus for Arts and Education

A new, permanent home in the heart of downtown Des Moines that expands opportunities for arts and education programming and performances, while serving as a shared resource for organizations from across the region.



## FOOD INSECURITY NETWORK

Support that facilitated dialogue, a current landscape analysis and a collaborative process to develop a cohesive plan to address food insecurity for our neighbors throughout Greater Des Moines.



### Greater Des Moines

## HABITAT FOR HUMANITY

### Framing Our Future

Support of land acquisition that will increase the supply of housing near employment centers, create new and affordable homeownership opportunities and set the stage for collaborative mixed-income development and innovative multi-family housing products to serve neighbors across the entire region.





GRANTED 

**\$787,450**

from the  
Better Together  
Fund

IN 2023



### PRIMARY HEALTH CARE

#### University Medical Clinic Expansion

The expansion will more than double the exam/flexible room capacity providing necessary space to accommodate services for over 7,200 patients annually, further addressing health disparities and expanding access to medical and mental health care to marginalized populations.



### OAK STUDIO

#### A Best Buy Teen Tech Center at Mainframe, powered by Wellpoint

A multifaceted center, designed to help address the digital and cultural divide that is exaggerated by socio-economic barriers by creating a space for youth to access technology in fun and engaging ways, including applications of science, engineering, math and creative exploration through innovative technology.



### YSS

#### Ember Recovery Campus

Iowa's first trauma-informed, nature-based behavioral health campus and only transition-age youth residential substance abuse program, will support youth through addiction recovery and provides for retreat-style cabins with dedicated youth beds, wellness and recreation areas, nature trails and therapy spaces.



We grow and foster charitable giving in Iowa by engaging local stakeholders as partners in promoting charitable giving, providing community leadership and making strategic grant investments.



Ric and Mary K Anderson have a legacy of being involved in their Marshalltown community, with a steadfast commitment to philanthropy. When a new season of life approached and Ric readied for retirement, understanding non-cash assets, like his Hy-Vee company stock, became a priority.

Their local Community Foundation of Marshall County, an affiliate of the Community Foundation of Greater Des Moines, provides tailored services, and together, they were able to help Ric and Mary K navigate what seemed like a complex gift.

The stock proceeds allowed the Andersons to open donor advised funds. This value-added option allowed them to realize tax-wise giving strategies, continue to give back to the community they call home and quite simply, make the process of stock payouts simple.

“The process was easy — we let Hy-Vee know to issue the stock, the Community Foundation helped us sell and place proceeds into donor advised funds,” said Ric. “We were able to establish the 5 Paws Foundation Fund from some of the proceeds, which is advised by our grandchildren. The kids get together and are active in selecting charities that interest them, touring the organizations and in the end, hand-delivering grants from the fund.”

“Julie Hitchins with the Community Foundation of Marshall County has been very accommodating and communicative,” said Mary K. “The Community Foundation can accept non-cash assets, and that has allowed us to give more than we were even before. The transition was simple and has allowed us to instill the importance of charity in our next generation of young, philanthropic givers.”



46



AFFILIATE  
county &  
community  
foundations  
served  
statewide

IN 2023

Dan Stockdale has worked with the Hardin County Community Endowment Foundation, an affiliate of the Community Foundation of Greater Des Moines, to help meet his clients' charitable giving goals and realize tax-wise strategies for a number of years. Through the generous spirit of area residents, a strong, trusting relationship has grown between Dan and Tam Elerding, program director with the Hardin County Community Endowment Foundation. "I am a firm believer in building relationships with our professional advisors, and working in cooperation with them to help those in our community that are charitably inclined," said Tam.

When an unfortunate tragedy struck the Stockdale family, Dan knew to turn to Tam, "Our oldest son passed away about a year ago, and we had a lot of our friends and neighbors wanting to offer support. We started a website where contributions could



be made directly online to a donor advised fund at the Community Foundation," said Dan Stockdale. "At a time when decisions were difficult to make, working with the Community Foundation allowed us to have flexibility and make adjustments. We continue to let the funds grow and eventually plan to make distributions to honor the legacy of our son."

# TOTAL CHARITIES SUPPORTED = 3,260



**GRANTED**  
from Community Foundation charitable giving funds.



**CONTRIBUTED**  
to Community Foundation charitable giving funds.



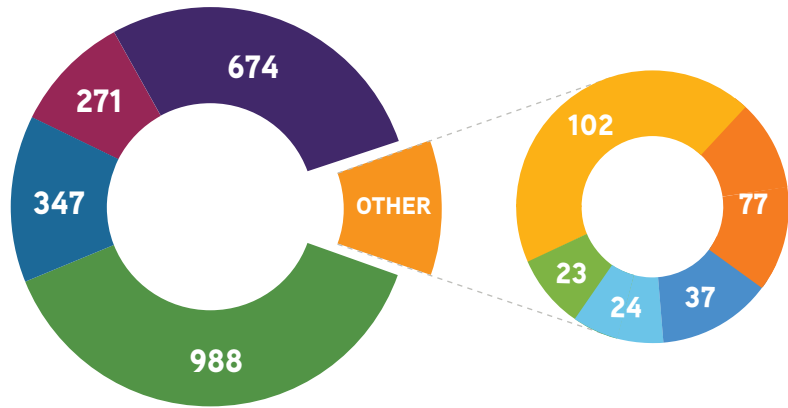
**ASSETS**  
under administration at the Community Foundation.\*



**CHARITABLE GIVING FUNDS**  
supported by the Community Foundation.

## CHARITABLE GIVING FUNDS

- Donor Advised - 988
- Agency - 674
- Designated - 347
- Committee Advised - 271
- **OTHER: 263**
  - Legacy - 102
  - Additional funds - 77
  - Better Together - 37
  - Seed - 24
  - Field of Interest - 23



## COMMUNITY FOUNDATION INVESTMENT PORTFOLIOS

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

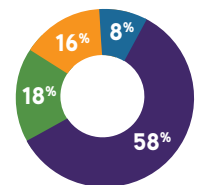
- Equities
- Fixed Income
- Alternatives
- Liquid Alternatives

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

15.1%  
2023

9.2%  
Five-year  
Annualized Return

6.3%  
Ten-year  
Annualized Return

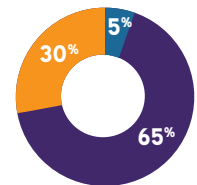


The **Indexed Growth Portfolio** seeks maximum growth, primarily through indexed funds, resulting in lower active management risk.

15.5%  
2023

8.4%  
Five-year  
Annualized Return

5.8%  
Ten-year  
Annualized Return

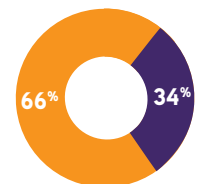


The **Moderate Growth Portfolio** is designed for growth at a more moderate level of risk.

12.1%  
2023

5.2%  
Five-year  
Annualized Return

3.7%  
Ten-year  
Annualized Return



Audited financial statements are available at [DesMoinesFoundation.org/finance](https://DesMoinesFoundation.org/finance).  
\*Includes assets administered but not owned by the Community Foundation.

# BOARD | COMMUNITY FOUNDATION BOARD OF DIRECTORS 2024

## BOARD MEMBERS

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

Darren Rebelez, *Casey's General Stores*  
 Sunnie Richer, *Doextra*  
 Robert G. Riley, Jr., *Riley Resource Group*  
 John Ruan IV, *Bankers Trust Company*  
 Mark Rupprecht, *R&R Realty Group*  
 Kuuku Saah, *Ntontan RE*  
 Brad Schoenfelder, *Ryan Companies*  
 Cynthia S. Thorland, *Life Care Services, Retired*

## EMERITUS BOARD MEMBERS

Charles H. Betts	William C. Knapp
Robert Burnett*	Linda Koehn
Monroe Colston*	Donald F. Lamberti
Ann Cownie*	Maddie Levitt*
James S. Cownie	James E. Luhrs*
Johnny Danos*	Robert Mannheimer*
Robert Dee*	Amos Pearsall, Jr.*
William Friedman, Jr.*	Marvin Pomerantz*
Nolden Gentry	J. Edward Power*
J. Barry Griswell*	Janis Ruan
H. Lynn Horak	Thomas Stoner*
James W. Hubbell, Jr. *	Fred Weitz
G. David Hurd*	
Ted M. Hutchison*	* Indicates deceased members

# STAFF | OF THE COMMUNITY FOUNDATION 2024

## EXECUTIVE

Kristi Knous, MPA, CAP®, FCEP  
*President*

## ADMINISTRATIVE SUPPORT

Mark Benson  
*Systems Analyst*

Chelsy Foy  
*Executive Assistant & C3 Center Coordinator*

Barb Hobson  
*Executive Assistant & Events Coordinator*

Jenny McCloud  
*Administrative Assistant*

Jeorgina Hernandez  
*Receptionist*

## AFFILIATE RELATIONS

Brianne Fitzgerald  
*Senior Director of Affiliate Relations*

Jacey Roy  
*Affiliate Relations Associate*

## MARKETING

Emily Toribio, MPA  
*Vice President of Marketing & Communications*

Betsy De Glopper  
*Director of Marketing*

Julia Jennings  
*Marketing Coordinator*

## COMMUNITY IMPACT

Angela Dethlefs-Trettin, MA  
*Chief Community Impact Officer*

Ellie Burns, Ed.D  
*Senior Director of Nonprofit Relations*

Dannie Patrick  
*Senior Director of Community Impact*

Sarah Cahill, MA  
*Community Impact Associate*

## CHARITABLE GIVING

Lynne Yontz, CAP®, FCEP  
*Chief Charitable Giving Officer*

Ryan Douglas  
*Senior Charitable Giving Advisor*

Sarah Ramsey, Ph.D  
*Senior Director of Donor Engagement*

Kati Dray  
*Charitable Giving Advisor*

Peyton Haas  
*Charitable Giving Associate*

Megan Benzing  
*Charitable Giving Coordinator*

Mimi Beringer  
*Charitable Giving Coordinator*

## FINANCE

Karla Jones, CPA, CGMA  
*Chief Financial & Administrative Officer*

Kris Pete-Swanson  
*Senior Vice President of Finance*

Shanna Bears, CNAP, MSA, BBA  
*Director of Accounting Services*

Sally Boeckholt, CNAP  
*Senior Accountant*

Elizabeth Corbett  
*Senior Accountant*

Kathy Khattiya  
*Accountant*

Kevin Ablar  
*Senior Accounting Associate*

Meagan Denham  
*Accounting Associate*

Tammy Crotts  
*Finance Associate*



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