

# *Living the Legacy*

## 2015 Annual Report



**GREATER POWESHIEK  
COMMUNITY FOUNDATION**

*We Grow Community Through Giving!*

1510 Penrose Street, P.O. Box 344, Grinnell, Iowa 50112

# *A Legacy of Service*

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## **A Message from the President**

In 2015 we lost one of the stalwarts of the Community Foundation: Thomas K. Marshall, aka as Tom. We have reflected how he helped shape our community and how devastated we feel by his absence. The board has considered thoughtfully about how to go about living his legacy and continuing his vision for community.

Tom's influence is seen in everything we do and it defines who we are today. In the late 80s, he suggested that community members explore the concept of a community foundation for the greater good of all rather than operate in their own little silos. The idea became the Greater Poweshiek Community Foundation (GPCF), an organization that provides an avenue to invest in the welfare and future of the region.

His legacy is steeped in the mantra of trust and working together to build a stronger community. GPCF is the story of how respected leaders, and donors have inspired others to give back to their community as a force for good. GPCF is a story of collaboration and partnerships that have a positive countywide impact.

Tom taught us well and the board of directors has created a strategic plan that will guide us in the future. During the next 10 years, we intend to increase our impact, connect to new communities and build a stronger foundation to address the challenges facing our county. We believe we can do this by engaging our donors, leveraging our endowment and forging new partnerships.

As you look through this report, think about the people who have helped to make ours a better community. This critical work can only be done with donors, nonprofits and community partners working together. We urge each of you to continue to combine your love for this place we call home with your passion for positive local change. Think about how you want your legacy to inspire others.

It remains our privilege and our responsibility—as it has since Tom started GPCF—to help people who do good, do greater for the place they called home.



A handwritten signature in blue ink, appearing to read 'Tim Douglas', with a stylized flourish at the end.

Tim Douglas  
GPCF Board President

# *A Legacy of Community*

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## **What is a community foundation?**

Community foundations provide a cost-effective and tax-efficient way for members of a community to pool their resources to improve the quality of life for residents in their region. Through a community foundation, funds can be invested to benefit a community for perpetuity. The Greater Poweshiek Community Foundation has the flexibility, efficiency, and resources to help individuals, families, or companies with charitable giving in the most cost-effective way possible.

**Mission:** The Greater Poweshiek Community Foundation is committed to strengthening communities and inspiring philanthropy by:

- Connecting donors with organizations and causes
- Investing funds responsibly
- Giving back to the greater Poweshiek service area
- Supporting nonprofits
- Facilitating community partnerships

**Vision:** *“We grow community through giving!”*

**Fast Facts:** Charitable Funds: 107

Asset Under Management: \$6.9 Million

Grants, Scholarships, & Distributions: \$14 Million

Contributions, Grant Income, Donation Received: \$16.8 Million

Donations Received in 2015 for Endowments: \$478,000



The National Standards Seal by our name indicates official confirmation from the Council on Foundations that we have met the most rigorous standards in philanthropy. It affirms our commitment to financial security, transparency and accountability.

# *A Legacy of Selflessness*

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## **Pie in the Sky Celebration**

The Greater Poweshiek Community Foundation hosted a Pie in the Sky event on June 2, 2015, to celebrate what would have been Tom Marshall's 82nd birthday. Friends and family of Marshall as well as supporters of GPCF gathered to release balloons and share pies in honor of his memory. Attached to each balloon was the following message:

"This balloon is released in memory of Thomas K. Marshall. He was a humble man who cared deeply for his community and founded the Greater Poweshiek Community Foundation. In honor of Tom, we ask that you simply do one act of kindness for someone in your community."

Tom Marshall's son suggested the Pie in the Sky theme for several reasons. When GPCF was founded, the idea seemed a little far-fetched, just like seeing a pie in the sky. Pie was also Tom's favorite dessert.

Attendees were also asked to nominate a local person who demonstrates Tom Marshall's example of community leadership and selflessness. Each month, GPCF will select one individual to receive a pie on the 2nd of the month to continue the tradition of the Pie in the Sky event.





# *A Legacy of Selflessness*

## Pie Winners

Each month beginning in July of 2015, an individual who embodied the selflessness of our founder, Tom Marshall received a pie at their home or place of work. Those nominated from July to December 2015 include:



Carol Nielsen



Clem Bodensteiner



Doug Cameron



Jill Allen



Larry Jansen



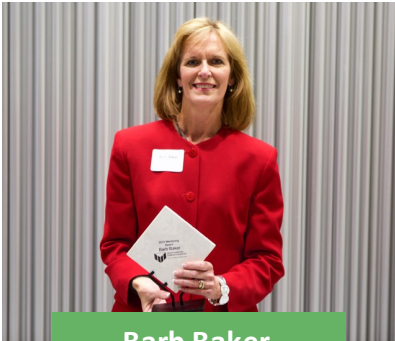
Jack Gustafson

# *A Legacy of Caring*

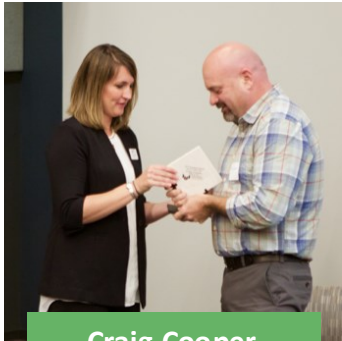
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## **The Spirit of Giving Awards**

On October 12, 2015, The Greater Poweshiek Community Foundation honored four community members for their outstanding commitments to philanthropy and volunteerism in our county. The ceremony was held at the Bartelt Conference and Education Center of Grinnell Mutual Reinsurance Company.



**Barb Baker**

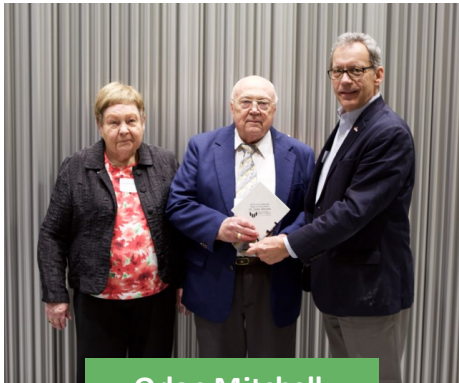


**Craig Cooper**



**Catelyn Graham**

Barb Baker received the Mentoring Award in recognition of her achievements in various community leadership roles. The Business Partner of the Year Award was presented to Craig Cooper of Bikes to You for representing a community-driven business model. Catelyn Graham received the Youth Spirit Award to highlight the scope of her philanthropic accomplishments at such a young age.



**Orlan Mitchell**

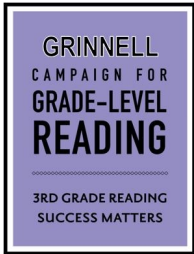
Orlan Mitchell was honored with the Connie Marshall Spirit of Giving Award for his lifetime achievements in philanthropy. Orlan's notable contributions to the Grinnell community begin with his instrumental role in building endowments for both the Mayflower Community and the United Church of Christ of Grinnell. As a board member of the Mayflower Community, he was very involved in the development of the Watertower Square Apartments. Orlan is also a regular contributor to numerous Grinnell nonprofits and served on the GPCF board in its formative years.

*"Caring is the hallmark of Orlan Mitchell"*

# *A Legacy of Working Together*

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## **Grinnell Campaign for Grade Level Reading**



The Grinnell community was accepted into the Annie E. Casey Foundation's national Campaign for Grade Level Reading in 2015 thanks to a partnership between GPCF and Grinnell College. School district administrators and staff, along with community members representing business, philanthropy, parents and volunteers met for approximately one year to look at the national program and determine if it was a good "fit" for Grinnell.

The Campaign for Grade Level Reading is a nationwide effort to make sure that all children can read at grade level by third grade, as third grade reading is an important predictor of high school graduation. Based on the idea that schools cannot succeed alone, the campaign gives community stakeholders a framework to work together in support of this goal. The Grinnell community's acceptance into the program in late 2015 and the formation of task force groups around summer learning loss, chronic absence, school readiness, healthy readers, and parent and family engagement have kick-started the program in Grinnell. These activities, coupled with an AmeriCorps grant to support the efforts, will ensure that the program continues.

GPCF is a member of the Grade Level Reading steering committee, houses a pass-through fund for grade level reading efforts, and is also a site host for an AmeriCorps member who is leading volunteer efforts.

The Grinnell Grade Level Reading program is an example of GPCF's efforts at convening groups around important community issues. Convening is a necessary and important role that community foundations must play as described in the National Standards for U.S. Community Foundations, the accrediting body of GPCF.



Grade Level Reading taskforce members at the Foundation Offices

# *A Legacy of Alliances & Giving Back*

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## **Poweshiek County Alliance (PCA)**



2015 marked the tenth year that the PCA has awarded grants in our county and much of the credit for the formation of this alliance goes to Tom Marshall. In 2005, Tom learned of legislation that provided a portion of the state gambling revenue be distributed to the Iowa counties that do not have gambling entities. He met with leaders of neighboring communities in Poweshiek County to encourage them to form an alliance to receive this funding. There was one caveat in that the fund needed to be held at a nationally certified community foundation and none of the community foundations in Poweshiek County were certified. Tom assured county leaders that GPCF will start the process of achieving national certification and in the meantime the fund should be housed “temporarily” at the Northeast Iowa Community Foundation. GPCF achieved certification in 2010 and PCA is now managed by GPCF.

Since the program began in 2006, \$880,358 has been distributed to nonprofits and charitable organizations in Poweshiek County. PCA is part of the County Endowment Fund Program created by the Iowa State Legislature. Fifty grant applications were received this year totaling \$322,248 in requested PCA grant funding. Winning projects largely focus on increasing cultural, educational, and recreational opportunities, as well as enhancing the safety, beauty, and economic vitality of the county.

A total of \$100,274.46 was distributed in grants to the following organizations in Poweshiek County: American Legion Post 296, BGM Schools, BGM Schools SADD Chapter, Brooklyn Ruritan Club, Brooklyn Community Foundation, Brooklyn Fire Department, Brooklyn Historical Society, City of Hartwick, City of Malcom, Crazy Cut Up Quilters, Deep River Helping Hands, Financial Service Group for the Searsboro Manor Inc., Galaxy, Inc. Town , Genesis Development, Grinnell Area Arts Council, Grinnell Newburg Schools, Imagine Grinnell, Montezuma Food Pantry, Montezuma Ministerial Association, Northeast Iowa Food Bank, Poweshiek County Pioneer Cemetery Commission, Poweshiek County Conservation, Poweshiek County Extension, Poweshiek County Historical and Genealogical Society, Presbyterian Family Center, Searsboro Fire Department, Station Clubhouse and Town of Guernsey.



# *A Legacy of Giving Back to Community*

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## **Community Fund for Poweshiek County**



The Community Fund for Poweshiek County has a goal of securing 1,000 individual members who each commit to donate \$100 per year for 10 years to create a \$1 million endowed fund. To date, there are 500 members and supporters of this fund. Each year earnings from the fund is distributed back to the community in the form of grants. In 2015, the following grants were distributed:

**\$500 – Forest Home Cemetery and Morrison Cemetery (Poweshiek County Pioneer Cemetery Commission)**- A project to restore and preserve pioneer cemeteries (a cemetery with 12 or fewer burials in the last 50 years) within Poweshiek County.

**\$500 – New Signage for the City of Malcom** – A community improvement project by the Malcom City Council to make the community more attractive to potential home buyers, developers and businesses. One component of the project is to replace dilapidated city signs on Highway 63.

**\$2,000 – Poweshiek County Fitzsimmons Schoolhouse-Poweshiek County Historical and Genealogical Society** – A project to complete the relocation of the Fitzsimmons Schoolhouse to the Poweshiek County Historical campus in Montezuma.

**\$500 – Grinnell Outdoor Adventure Program-Grinnell-Newburg School District** – A project designed to offer outdoor recreational and leadership opportunities for Grinnell-Newburg High School students.

**\$1,000 – Bully-Grinnell Area Arts Council/Grin City Collective** – A project of the Grin City Collective (a project space and artist residency program designed to foster interdisciplinary collaboration among artists and the public).

**\$600 – Medical Responders-Searsboro Community Fire/EMS** – A project to establish an ambulance service for the Searsboro area including training Emergency Medical Responders and purchasing supplies.

**\$400 – Community Sign-Brooklyn Economic Development** – A project to purchase and install community sign on the north side of the Brooklyn community.

**\$234 – Monarch Waystations-Imagine Grinnell**- A project to restore 20 milkweed habitats for monarch butterflies.

**\$970 – BGM Bearbags-Brooklyn Community Foundation**- A project that provides bags of filling, kid-friendly food to students during the school year on Friday afternoons to sustain them through the weekends when they do not have access to the free and reduced meal program.

**\$320 – Beyond Our Galaxy-Galaxy Inc. Youth Programs** – A project designed to provide youth attending the Galaxy with field trip opportunities outside of Grinnell. Grant funds will be used for field trips to Jacob Krumm Preserve.

# *A Legacy of Planning for the Future*

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## **Transfer of Wealth**

According to a study done by the Community Vitality Center, in 50 years, \$531 billion is expected to pass through probated estates from one generation to the next in Iowa. In just 10 years, \$74.4 billion will have transferred.

National research projects a \$41 trillion transfer of wealth across the United States. But while the average transfer nationwide will peak after 50 years, wealth transfer in many Iowa counties is projected to crest much sooner. Much of this wealth is currently invested in family homes and farms, retirement accounts and other appreciated assets-some of which may be heavily taxed if given to heirs.

This same study projects that over \$5.4 billion in Poweshiek County will be transferred over the next 50 years. In the period 2010–2019 the potential transfer of wealth from one generation to the next in our county is estimated at \$832 million. With many heirs living outside of our area we run the very real risk of seeing critically needed assets vanishing from our area forever.

What are the possibilities if residents make plans in their estates for only 5% of that transfer to be contributed to local charitable endowments? That would result in \$41.6 million added to our local philanthropic sector. These new endowments would generate approximately \$2 million in annual grant making focused on solving problems and improving the quality of life right here in Poweshiek County.

Imagine the power, the promise, and the potential of planning this far down the path to benefit our children and grandchildren and residents yet to come.

## **The key to leaving a lasting legacy**

Donors who endow gifts can make a difference in their community during their lifetime and, at the same time, establish a legacy that lasts forever. When you create an endowment fund through the Community Foundation, you can support the community you love in your name, forever. Your gift is invested over time. Earnings from your endowment fund are granted to organizations and needs in the community, based on your direction.

We can help ensure your legacy. Please connect with us at 641-236-5518.

# *A Legacy of Permanence*

## How will you be remembered?

For those of us who care about our community, who are dedicated to giving back of what we have – be it time, money, talent, or other resources – it is inevitable to question the next step: how can I prepare today to impact the future after I am gone?

### Enter the power of endowments.

The illustrations below show how a \$10,000 gift, if invested, can produce nearly four times its original value in gifts over the next fifty years, and its capacity just keeps growing. It's fascinating that a small investment can create ripples that last lifetimes thereafter.

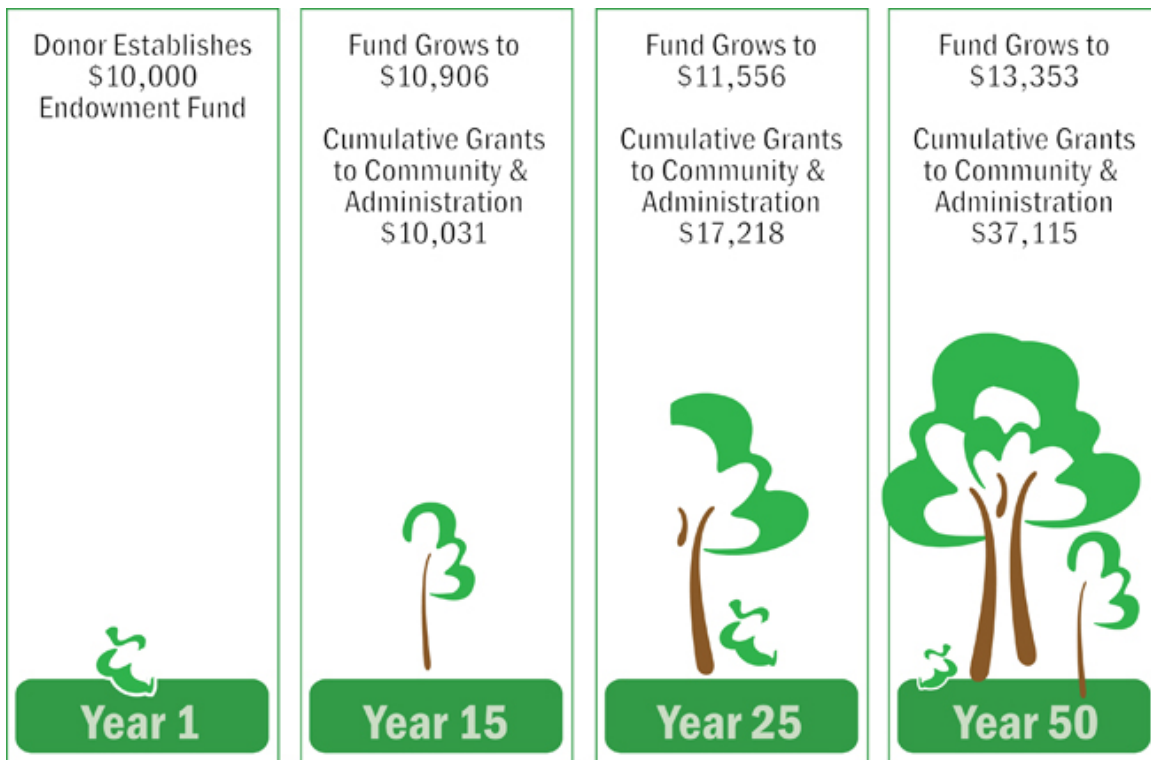


Illustration assumes a 7% average annual return, 4% grants payout and 2% for administrative contributions. Actual results may be different.

# A Legacy of Permanence

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## Endow Iowa: Get Credit For Creating Lasting Good.

Giving through the Community Foundation to the causes you care about is rewarding—in more ways than one. Your gift creates lasting change in the community, and the Endow Iowa Tax Credit Program offers you generous tax incentives to make it easier for you to give more for less. The Greater Poweshiek Community Foundation is a qualified community foundation that provides access to Endow Iowa tax credits.

The Endow Iowa Tax Credit Program allows taxpayers to receive an Iowa state income tax credit equal to 25 percent of the value of your gift for certain endowed charitable gifts. These gifts are not eligible for a state income tax deduction, although they do qualify for the federal charitable deduction.

***With Endow Iowa, contributions to the Community Foundation cost donors less. For example, a \$10,000 gift could cost just \$5,000\* or less depending on your marginal federal tax rate.***

## Gifts That Give Back- How It Works

Amount of Gift	\$1,000	\$10,000	\$100,000
Federal Deduction	(250)	(2,500)	(25,000)
Endow IA Tax Credit	(250)	(2,500)	(25,000)
Net Cost of Gift	\$500	\$5,000	\$50,000

**\*Based on a 25% marginal federal tax rate. The savings are even greater if a donor makes the same gift using appreciated securities instead of cash, because the donor avoids capital gains tax on the donated securities.**



# *A Legacy of Giving Back*

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## **Choosing the Best Way to Give**

We work closely with you to find the perfect match for your charitable goals. There is a wide variety of giving options available to you:

**Appreciated Securities** gifts help you avoid capital gains taxes and earn a charitable tax deduction based on market value. Your gift then establishes a fund or adds to an existing fund, benefiting causes and organizations you care about most.

**Bequests** establish charitable funds through your will or living trust. In doing so, you are able to distribute some or all of your assets, tax free.

**Cash** is one of the easiest ways to establish a fund at the Community Foundation.

**Charitable Lead Trusts** help you build a charitable fund with the Community Foundation during the trust's term. When the trust terminates, the remaining assets are transferred to you or your heirs, often with significant transfer-tax savings.

**Charitable Remainder Trusts** allow you to receive income for the rest of your life, knowing that whatever remains will benefit your community.

**Charitable Unitrusts** pay the beneficiary a fixed percentage of the principal of the trust as it is revalued annually.

**Gifts of Grain** allow you to avoid including the sale of the grain in your farm income. You deduct the cost of growing the crops, which typically results in saving self-employment tax, federal income tax and state income tax. You can benefit even if you don't itemize your deductions.

**Insurance Policies** can be named to the Community Foundation in total or even just a portion.

**Retirement Plans** provide an opportunity for substantial tax savings for your heirs if you name a Community Foundation fund as a beneficiary of assets.

**Real Estate Gifts** allow you to receive the maximum tax deduction allowed and avoid capital gains tax.

# *A Legacy of Planning*

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## **Becoming a Donor**

If you have a desire to make your community a better place, the Greater Poweshiek Community Foundation can help you make that happen. Whether you choose to establish a new fund of your own, add to an existing fund, or make a planned gift, GPCF will make sure the process is as simple and hassle-free as possible, so you can feel confident that your dollars are working to benefit your community. There are three ways you can become a donor:

### **1.) Create a Named Fund**

With a gift of \$10,000 or more, you can establish a named fund to create your personal legacy. Your fund may be donor advised, scholarship, designated, or field of interest. A Named Fund is a permanent and powerful way of giving. Your intentions are honored in perpetuity. Your money is pooled with other investments in our long term portfolio that preserves capital during tough times and extends the value and reach of your giving. And because we are a public charity, you receive the maximum tax benefits allowed by law.

### **2.) Add to an Existing Fund**

Support a cause, honor a loved one, or express your values by giving to any of our existing funds. Gifts of any amount are accepted at any time.

### **3.) Make a Planned Gift**

You can make a gift to the community that provides income and tax benefits now and supports your philanthropic goals after your lifetime. Name the Foundation in your will or as the beneficiary of retirement assets, transfer a life insurance policy, contribute real estate as a future gift while using the property throughout your lifetime, or setting up a charitable remainder trust or charitable unitrust.

## **The Power of Endowment!**

By allowing your gift to grow and be invested over time, regardless of the amount, the original amount will be given away **many more times than the original gift...** and it will continue to be given for generations to come. Help do good work today and in the future.

# *A Legacy of Purpose*

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## **Selecting a Purpose for Your Fund**

There are many funds we hold that carry out the charitable interests of individuals, families and even nonprofit organizations that have put endowment funds with us to ensure their futures. All of the GPCF component funds, whether they are endowed in perpetuity or are intended to be used now, help us all create a community that gives us opportunities to share our lives with our neighbors and generations to come.

### **Agency Funds**

#### **Endowing nonprofit organizations.**

Agency funds allow nonprofit organizations to place their endowments with the Community Foundation as a way to protect and grow their funds for the future. These agencies benefit from a range of services, including marketing support and investment oversight. As these endowments grow, they become an increasingly valuable source of support for the programs and services these agencies provide to our community.

**Grinnell-Newburg Dollars for Scholars\***

**Grinnell-Newburg Educational Excellence (GNEE)\***

**Imagine Grinnell\***

**Iowa Transportation Museum\***

**Mayflower Human Needs Endowment\***

**\* Denotes endowed funds**

## **Capital Campaigns/Program Sponsorship Funds**

#### **Helping with short-term projects and fiscal sponsorships.**

Capital campaigns and program sponsorship funds are typically established by community groups planning a specific short-term project that is clearly charitable in nature. Program services include the provision of nonprofit status to the project (thus making contributions tax-deductible), acknowledgement and management of contributions, and disbursement of grants and expenses from the fund.

**Central Park Project**

**Grinnell Veterans Memorial Commission Building Campaign**

# *A Legacy of Purpose*

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## **Community Betterment Funds**

### **Meeting ever-changing community needs**

Unrestricted funds address a broad range of local needs, including future needs that often cannot be anticipated. They enable the Community Foundation's board of directors to assess community needs and respond to the community's most pressing needs, today and tomorrow.

**The Community Fund for Poweshiek County \***

**Montezuma Community Fund Endowment\***

**Poweshiek County Alliance Endowment Fund\***

**Poweshiek County Alliance Grants Fund**

## **Designated Funds**

### **Helping sustain and grow local organizations.**

Designated funds provide a wonderful way to give back to one or more specific organizations that have touched your life. Your gift provides more than just funding—your favorite organization will benefit from the Community Foundation's investment stewardship and ability to manage endowment funds.

**Ahrens Park Foundation Senior Walkers**

**Anna Marie Emry Endowment Fund\***

**Brooklyn Community Foundation Endowment Fund\***

**Brooklyn Historical Society Endowment Fund\***

**Brooklyn Volunteer Fire Department Endowment Fund\***

**Citizen Scholarship Foundation of BGM\***

**City of Grinnell Park Improvement Fund**

**Dr. Kevin W. Sterk Elementary Student Needs Endowment Fund\***

**Drake Community Library Endowment Fund\***

**East Poweshiek County Ambulance Service Endowment Fund\***

**Grinnell Area Arts Council\***

**Greater Poweshiek Community Foundation Administrative Fund**

**Grinnell Historical Museum Endowment Fund\***

**Grinnell Regional Medical Center Endowment Fund\***

**Grinnell Regional Mental Health Center Endowment Fund\***

**Lutheran Services in Iowa Endowment Fund\***

**Michael J. Manatt Community Center Endowment Fund\***

**Montezuma Public Library Fund**

**Montezuma United Methodist Church Endowment Fund\***

**Montezuma Wellness Fund**

**Tom & Connie Marshall Administrative Endowment Fund\***



# *A Legacy of Purpose*

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## **Donor-Advised Funds**

### **A personal approach to giving.**

Donor-advised funds are convenient, flexible tools for individuals, families, businesses, or groups that want to be personally involved in suggesting grant awards made possible by their gifts. If you have a range of community interests, you may find that a donor-advised fund is an ideal vehicle for fulfilling your charitable wishes.

**The Baumann Family Donor Advised Fund\***

## **Field of Interest Funds**

### **Connecting personal values to high-impact opportunities.**

Field of interest funds allow you to target your gift to address needs in a specific area—arts, health, education, aging, at-risk youth, etc. Our board awards grants to community organizations and programs that are making a difference in the area you select. Your gift stays flexible enough to meet community needs in your interest area—even as needs change over time.

**Anna Marie Emry Endowment Fund\***

**Douppnik/Hawkins Family Music Fund\***

**Kate & Chuck DeLong Memorial Fund**

**Lydia Reida Science Fund\***

**Shaeffer Award for Theater Arts\***

## **Program Partners & Initiatives**

### **Serving as an umbrella organization and financial manager for many other organizations.**

By banding together, these organizations achieve efficiency of scale while maintaining independent advisory committees.

**Big Hearts 4 Tiny Hands**

**Communities for Literate Iowa Kids (CLIK Program)**

**Grinnell-Newburg High School Alumni Association**

**Grinnell-Newburg Dollars for Dollars**

**Grinnell-Newburg Educational Excellence (GNEE)**

**Imagine Grinnell**

**Jasper, Marion, Poweshiek (JMP) early Childhood Area**

**Kids Against Hunger**

**S.H.E. COUNTS**

**Tiger Packs**

# *A Legacy of Investing in our Kids*

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## **Scholarship Funds**

### **Investing in deserving students.**

Scholarship funds allow you to invest in your community's future and show students you care. You can create a scholarship as a memorial to someone special, selecting eligibility criteria that exemplify that person's goals and values. Or you may use it to express your own educational values—or those of your family or business.

Adelberg Family Scholarship  
ASI Scholarship  
Audrey Griffith Educational Scholarship\$  
Audrey Pederson Memorial Scholarship  
Dr. Kevin W. Sterk Memorial Scholarship  
Doug Shutts Memorial Scholarship  
EPC Scholarship\*\$  
Fitzgerald Family Scholarship\$  
Green Futures Fund\$  
Grinnell-Newburg Dollars for Scholars Scholarship\*  
Hilke Family Scholarship  
Iowa Telecom Scholarship\$  
Jewel & John Kintzinger Memorial Scholarship\*  
Kalleen Buchmeier Memorial Scholarship\*\$  
Kurth Science Scholarship  
Lance Reimers Memorial Fund\*\$  
Leroy Schneider Memorial Scholarship

Lincoln Savings Bank Scholarship  
Lucille M. & Kenneth J. Benda Scholarship  
Lydia Reida Scholarship\*  
Marvin D. Bahr & Rosada E. Bahr Scholarship\$  
McCormick Scholarship Fund\*  
Nathan Figland Memorial Wrestling Scholarship\*\$  
Newburg Alumni Scholarship\$  
Nicole Kelling Memorial Scholarship  
Peak Fund  
Praestantia Scholarship\*\$  
Rachel & Richard Sanders Scholarship\*\$  
Renaud Fund\*  
Ronald Graham Memorial Scholarship\*\$  
Scandrett Scholarship Fund\*  
Sid Potts Scholarship Fund\*  
Vivian G. Craig Music Scholarship  
Whitetail Unlimited Scholarship\$

\$ Denotes Dollars for Scholars Funds

\*Denotes an endowed fund or scholarship

# *A Legacy of Achievement*

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## **2015 Designated DFS Scholarship Recipients**

Adelberg Family Scholarship	Kayla Jones
ASI Scholarship	Lily Hamilton
Class of 49 E.A. Kurth Science Award	Ryan Nelson
Don and Alice Renaud Scholarship	Samuel Kibbee
Doug Shutts Memorial Scholarship	Emmaleah Veldboom
Dr. Kevin W. Sterk Memorial Scholarship	Andria Mulholland
Girls Camp Association Scholarship	Kennedy Surch
Hilke Family Scholarship	David Clower
John Kintzinger Memorial Scholarship	Nathaniel Vosburg
Kenneth J. and Lucille M. Benda Scholarship	Taegan James
Lincoln Savings Bank Scholarship	Grace Morrison
Lydia Reida Scholarship	Christa Follette
McCormick Memorial Scholarship	Kyle Nisley
Nicole Marie Kelling Scholarship	Sarah Frischmeyer
Scandrett Family Scholarship	Catheryn VanCleve
Sid Potts Scholarship	Emma Hartz, Deja Jackson, Sydney Roudabush
Vivian G. Craig Scholarship	Joshua Randolph

## **2015 General DFS Scholarship Recipients**

Amanda Allen	Olivia Gallo	Jordan Link	Kyle Sadler
Barrett Anderson	Catelyn Graham	Daniel McCammant	Paul Salmon
Philip Bagnoli	Christian Graham	Bailey Moore	Julio Sanchez
Ian Baumann	Clayton Harris	Kyle Moore	Austin Sisson
Brittany Brown	Ashton Hatting	Allison Neeley	Casady Slocum
Cassandra Carnes	Lucas Honold	Abigail Osborne	Taylor Smith
Kenny Clark	Garret Jay	Alexia Pagel	Matthew Spencer
Anthony Clayton	Noah Juni	Randy Paulson	Jenna Steffen
Kyle Cogley	Makayla Kadner	Kiara Petersen	Kayte Werner
Caitlyn Criswell	Jessie Kaul	Seth Poush	Robert Whitehead
Anna Cunningham	Bridget Keenan	Michael Reaves	Matthew Wray
Mackenzie Ellis	Abigail Kriegel	Mariah Reed	Denton York
Morgan Finch	Cameron Lahn	Elijah Reische	Anna Zeimis
Marilyn Fiser	Josie Leshen	Holly Rosburg	
Cassie Freeborn	Arijan Limani	Jocelyn Rupe	

# *A Legacy of Giving Big*

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## **Big GIVE Month**

From October 12th to November 12th, the Greater Poweshiek Community Foundation hosted our annual Big GIVE Event, a month-long giving opportunity to raise as much money as possible for the foundation and the local nonprofits we serve. During Big GIVE Month this year, donors pledged and contributed just over \$307,500 to 36 different funds! Thanks to donors like you, the communities of Poweshiek County will continue to thrive for years to come. The nonprofit organizations and funds that received support during this month-long period of giving include:

Baumann Family Donor Advised Fund  
Big Hearts for Tiny Hands  
Brooklyn Community Foundation Endowment  
Brooklyn Historical Society Endowment  
Brooklyn Volunteer Fire Department Endowment  
Central Park Project  
Citizen Scholarship Foundation of BGM Endow.  
City of Grinnell Parks Improvement Fund  
Communities for Literate Iowa Kids (CLIK)  
Community Fund for Poweshiek County  
Dollars for Scholars Endowment  
Dollars for Scholars General Fund  
Dr. Kevin W. Sterk Elementary Student Needs  
Endowment Fund  
Drake Community Library Endowment  
East Pow. County Ambulance Service Endow.  
Grinnell-Newburg Educational Excellence  
GNEE Endowment

Grinnell Area Arts Council Endowment  
Grinnell High School Alumni Association  
Grinnell Historical Museum Endowment  
Grinnell Regional Medical Center Endowment  
Grinnell Regional Mental Health Center Endow.  
Grinnell Veterans Memorial Commission Building  
Imagine Grinnell  
Imagine Grinnell Endowment  
Kids Against Hunger  
Mayflower Human Needs Endowment  
Michael J. Manatt Community Center Endowment  
Montezuma Community Fund Endowment  
Renaud Scholarship  
S.H.E. Counts  
S.H.E. Counts Endowment  
Station Clubhouse  
Tiger Packs  
Tom & Connie Marshall Administrative Endowment

## **A Year of Generosity**

In addition to the contributions received and the pledges made during the Big GIVE Month event, GPCF would like to thank all of the individual donors, couples, and local businesses who have made a contribution during any point of the year 2015. The sheer number of names on the list of our community donors speaks volumes to the legacy that Tom Marshall created by establishing the Greater Poweshiek Community Foundation. It is inspiring to see how Tom's legacy will continue to live on through our county's commitment to philanthropy, and we look forward to watching our donor base continue to grow in the years to come.



# *A Legacy of Generosity*

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## **2015 Donors**

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# *A Legacy of Generosity*

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First Friends Church  
First Presbyterian Church  
First State Bank  
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Doug Samson  
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# *A Legacy of Generosity*

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# *A Legacy of Generosity*

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Barb Trish  
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United Church of Christ Congregational  
United Fire Group  
University of Iowa Comm. Credit Union  
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James & Arloene Yungclas  
M.J. Zimmerman  
Merle W. Zirkle

† deceased

Every effort has been made to ensure that our report is accurate. However, if we have made any errors, please call our office at 641-236-5518 so that we can make corrections.

# *A Legacy of Leadership*

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## **2015 Board of Directors**

### **Officers**

<b>Tim Douglas</b>	Board President & Chief Financial Officer, Manatt's, Inc.
<b>Jessica Dillon</b>	Board Vice President & Senior Investment Analyst, Grinnell College
<b>Chris Hansen</b>	Board Treasurer & Vice President of Finance, Grinnell Mutual Reinsurance Co.
<b>Marilyn Kennett</b>	Board Secretary & Library Director, Drake Community Library
<b>Nancy Maly</b>	Past President & Retired Associate Director of Admissions, Grinnell College

### **Board**

<b>David Arendt</b>	President, Peoples Savings Bank
<b>Jo Becker</b>	Retired Telecommunications Manager, Verizon Wireless
<b>Rachel Bly</b>	Director of Conference Operations & Events, Grinnell College
<b>George Britton</b>	Retired City Planner
<b>Matt Buckingham</b>	President, Brownells
<b>Mike Mahaffey</b>	Attorney, Montezuma
<b>Laura Manatt</b>	Executive Director, Pow I-80
<b>Dave Ness</b>	Vice President of Operations, Grinnell Regional Medical Center
<b>Martha Pinder</b>	Managing Editor, Grinnell Herald-Register
<b>Jodie Ryan</b>	Branch Manager, Great Western Bank
<b>Vince Walker</b>	Associate Director of Development, Grinnell College

### **Staff**

<b>Delphina Baumann</b>	Community Relations Coordinator
<b>Nicole Brua-Behrens</b>	Program Coordinator

# *A Legacy of Stewardship*

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## Statement of Financial Position

<b>Current Assets:</b>	<b>Dec 31,2014</b>	<b>June 30,2015</b>
Cash & Cash Equivalents	\$1,077,452	399,695
Accounts Receivable	148,254	193,689
Prepaid Expenses	25	25
<b>Total current assets</b>	<b><u>\$1,225,731</u></b>	<b><u>\$593,409</u></b>
<b>Long-Term Assets:</b>		
Investments	\$4,166,461	4,434,903
Receivables	318,214	328,345
Beneficial Interest in Charitable Trusts	<u>1,084,453</u>	<u>1,058,587</u>
Total Long-Term Assets	<u>5,568,128</u>	<u>5,821,835</u>
<b>Total Assets</b>	<b><u>\$6,793,859</u></b>	<b><u>\$6,415,244</u></b>
<b>Current Liabilities</b>		
Accounts Payable	\$104,225	\$169
Accrued Expenses	2,837	2,009
Grants Payable	11,531	20,814
Scholarship Payable		52,900
Charitable Funds Held for the Benefit of Others	<u>838,979</u>	<u>646,477</u>
<b>Total Current Liabilities</b>	<b><u>\$957,572</u></b>	<b><u>\$722,369</u></b>
<b>Long-term Liabilities:</b>		
Charitable Funds Held for the Benefit of Others	<u>113,443</u>	<u>109,771</u>
<b>Total liabilities</b>	<b><u>\$1,071,015</u></b>	<b><u>\$832,140</u></b>
<b>Net Assets:</b>		
Unrestricted Net Assets	4,441,031	4,270,364
Temporarily Restricted Net Assets	<u>1,281,813</u>	<u>1,312,740</u>
<b>Total Net Assets</b>	<b><u>5,722,844</u></b>	<b><u>5,583,104</u></b>
<b>Total Liabilities &amp; Net Assets</b>	<b><u>\$6,793,859</u></b>	<b><u>\$6,415,244</u></b>

# *What type of legacy do you want to leave?*

## **Celebrating the Legacy of Tom Marshall**

Tom Marshall's selflessness and dedication to philanthropy inspired countless individuals to give back to our community. The Greater Poweshiek Community Foundation would like to thank our donors for continuing to live his legacy.



**GREATER POWESHIEK  
COMMUNITY FOUNDATION**

*We Grow Community Through Giving!*

1510 Penrose Street, P.O. Box 344, Grinnell, Iowa 50112