

# LEGACY

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Mike Drymiller, Board Chair

## Solid Ground to Stand On in Uncertain Times

Financial advisors like me are always looking at the world with antennae up. We need to know what's happening now, and at the same time we're scanning the horizon to detect emerging trends and issues that will have an impact on our clients' investments in the near and distant future.

Right now, everywhere you look there is uncertainty. You may feel stress every time you read or watch the news – there is tremendous unrest in every corner of the world.

We've been through times like these before. Those of us who remember the Sixties may remember a time of insecurity and violence – it wasn't all music and flowers in your hair. There have been many times of national anxiety since but we've managed to outlast them.

The Community Foundation of the Great River Bend was born in 1964. For almost 50 years, through bad times and good, we've provided our donors with solid ground to stand on. Donors come to us with their charitable goals and they find us ready to help turn their dreams into reality.

Sometimes, donors aren't certain which causes are most important to the community. We help them identify the issues they care about. Then we work with them to establish their legacy. They're secure in the knowledge that even after they're gone we'll continue as stewards of that legacy.

The Foundation has dozens of financial managers constantly working to grow our funds in a safe, competent and transparent way. In 2004, the Community Foundation gave out less than \$1 million in grants. Last year, we gave out \$6 million. Because of our donors, we're able to make life better for thousands of people each year. That's where we place our focus.

Problems that face a nation and a community change with the times. Uncertain times come and go. In the meantime, you can rely on one thing. The Community Foundation is here to stay, working to bring your goals to fruition and to make the community a better place to live. ■

“Donors come to us with their charitable goals and they find us ready to turn their dreams into reality.”

## Brian Burke: A Legacy Society Member and a “Classical” Case of Altruism

A bust of Ludwig von Beethoven sits in the corner of Brian Burke’s Davenport office, looking over his shoulder as he works. On the desk to his left, a Bose system softly fills the office with classical music from public radio. Even his coffee mug is imprinted with the images of long-deceased composers. People passing by his office might not realize it, but this young man is uniquely ahead of his time.

At age 38, Brian Burke, a financial advisor at Northwestern Mutual, is already the youngest member of the Legacy Society, a group that recognizes people whose planned giving includes the Community Foundation. Brian plans to give half his estate to the community through CFGRB.

“I was preaching to people about planned giving,” he says. “Estate planning is something I talk to clients about. I’m single – I don’t have dependents – but that doesn’t mean I can’t do the same thing.”

Brian earned a music degree from the University of Northern Iowa and moved to

the Quad Cities right out of school. He’s been involved in the local music scene as a musician, as the director of Big River Brass and as a community leader. Organizations that he’s involved with have made substantial donations to local nonprofits, including the symphony.

Personal relationships launched his interest in the Foundation. He met former President Tana Odean at Sacred Heart Cathedral, where he was playing music. Then, as a member of the Kiwanis Club he met Susan Skora when the club decided to divest some stock and start a fund at the Foundation. He came to know CFGRB as an organization he could trust.

“People need to know that working with the Community Foundation is easy,” Brian says. “You should have a cause that you care about. But if you don’t have specific causes or organizations you want to support, you can still help the community through the Foundation’s Community Impact Fund and the gift will be distributed as needed.”



Brian Burke

Brian has done well, but his work in philanthropy is far from over. Besides planned giving and civic philanthropy, he also invests “sweat equity” as a volunteer.

“I try to do more during life instead of doing it all through deferred giving, because that requires me to not be around,” he laughed. “I look forward to doing more things during life.” And since he’s not yet 40, he should have plenty of time to do that.

“It’s nice to make an impact,” he says. ■



### Scholarship Decisions: Behind the Scenes

CFGRB and our affiliates distributed \$500,000 in student scholarships last year, and 2011 might see that number go even higher. Pictured here are members of the Scholarship Committee in a meeting on March 31 as they make selections from more than 800

applicants. Some scholarships are based on a student’s financial need and some are based on field of study or other factors. This is hard work for committee members, and very important to the future of the students. In this photo, from left to right, are Tracy Schwind, Jean Steffenson, Mary Elizabeth Sievert, and Fred Luckenbill.



### Teens for Tomorrow Make Nonprofit Grant Decisions

Brady Frieden, the new Student Director of our Teens for Tomorrow (T4T) program hands out grant applications from nonprofit organizations in the Quad Cities area. Teens met on March 20 to break into

11 groups, each with a stack of applications. During late March and early April, students research and visit the nonprofits, then decide on May 1st how to distribute the grants. Last year, T4T members granted \$6,000 to six organizations. Now, through the Herb and Arlene Elliott Endowment, established by Arlene through her estate, the T4T program is permanently endowed and can distribute \$10,000 in grants.

# Susan Skora and Barbara Melbourne: The People to Call about Giving to the Community through the Foundation

When new donors (individuals, families, nonprofit organizations or corporations) approach the Foundation to make a gift to the community, set up a fund or transfer an endowment, they talk first with Vice President of Development Barbara Melbourne or CEO & President Susan Skora.

Both Susan and Barbara have a long history of helping people shape their philanthropic gifts. They both have law degrees, both have worked in higher education; Susan has a financial background in trust management, while Barbara has worked in social services in endowment development positions.

"Building endowment is what we do," says Susan. "As we build endowment funds for the community, each year we're able to help more and more people through the nonprofit organizations that serve their needs."

Last year, the Community Foundation and its affiliates distributed \$6 million in grants

to nonprofits that address a wide variety of community needs.

"The people who call us want to do good things in the community," Barbara says. "Many of them want to perpetuate the support they've given to nonprofits throughout their lifetime – or the support that has been given by a family member. Some of them have never donated before, and they need to be assured it's a very simple process."

New donors may have cash or they may want to include the community in their wills and estate plans. Donors bequeath a wide variety of assets to the community – publicly-traded securities, real estate, and more. Susan and Barbara help them make the decision that achieves the goals they have for their families and their community.

"One of the main concerns donors have when they're deciding where to make their gift is the trustworthiness of the organiza-

tion," Susan adds. "Will their gift and their legacy be protected by good stewards? The Community Foundation has proven for nearly 50 years that we are an organization that will be here to make sure they are remembered, and their gift will support the causes they love – forever."

Donors are involved in a transparent system. They always have access to their fund information. One of the tools they use is MyFund, part of the Community Foundation's website ([www.cfgrb.org](http://www.cfgrb.org)). Through MyFund, donors can keep track of their funds and even make grant decisions online.

"We set the elements in place to develop a real relationship with donors," says Barbara. "We become partners with them. They can be as involved as they want."

If you have questions about giving to the community, contact Barbara or Susan at (563) 326-2840. ■

## Affiliate Spotlight: LincolnWay Community Foundation

The LincolnWay Community Foundation began in 1987 as the DeWitt Area Foundation, but changed its name last year to reflect the fact that the Foundation is intended to serve the rural Clinton County area.

"The foundation has grown up," says Pat Henricksen, executive director. "We want all of rural Clinton County to know that we're here to meet the needs of their communities."

Those needs can be vastly different – from refurbishing an old fire house to building a new auditorium or community gymnasium;



Susan Skora (left) and Barbara Melbourne

“As we build endowment funds for the community, each year we’re able to help more and more people through the nonprofit organizations that serve their needs.”

from hunger and homelessness to granting scholarships to college-bound students.

“The foundation is a diverse agency working with communities to meet their needs for the future,” Pat says. “It’s an effective way for community members to support their favorite cause, project, church, or organization.”

The LincolnWay Community Foundation has a total of 52 funds and has distributed grants totaling \$300,000 over twenty years. In 2010, grant recipients included the Lost Nation Library, the City of Welton, Clinton County Conservation Foundation, Women

of Welton, DeWitt Chamber of Commerce, and others.

As an affiliate of the Community Foundation of the Great River Bend, the LincolnWay Community Foundation is able to handle administration of endowment for organizations, including the DeWitt Operahouse Theater. By turning over the administration of endowment to LincolnWay, the DeWitt Operahouse Theater saves time and resources and is able to focus on what it does best – enrich the area through the arts.

CFGRB has 11 affiliates in the 17 counties that it serves in Iowa and Illinois. Because

CFGRB is a qualified community foundation, Iowa taxpayers who donate to endowments at our affiliates in the state, including the LincolnWay Community Foundation, can take advantage of the 25% tax credit under the Endow Iowa program. ■



Jim Horstmann, Legacy Director



## Legacy Director's Corner: Establishing Your Legacy Does Not Have to Be Difficult

How would you like to be remembered? This is a question that carries with it a profound issue that most of us don't dwell on: we're not going to be here forever. Will anyone remember we were here, or will we vanish in time and become just names on a family tree?

The best way to ensure that your life has a positive impact on the community is to establish a legacy. It's easier than you might think, but there is a key question you must ask yourself.

What's important to you?

The answer doesn't have to be restricted to one thing. You may care deeply about your alma mater; about helping the home-

less and hungry; about the environment or the arts. We all have issues that tug at our souls.

The simplest way to establish your legacy is to make a bequest. In your will, select a percentage of your estate or a fixed amount – you can even bequeath real estate or securities to the Community Foundation. All you have to do is make your wishes known.

Next, name the causes that you want your gift to support. This can be a broad topic such as "domestic abuse" or it can name one or more specific organizations.

A simpler way is to designate your gift to the community through the Foundation's Community Impact Fund. Each year, forever, you will help address the community's most pressing needs. Those needs change from time to time, and your

gift will keep up with the changes and be directed where support is most needed.

I always recommend that you discuss your wishes with your family and get their support. Some individuals have highly successful children and decide to give most or all of their estate to charitable causes. Others include their family in their estate plans, and rightfully so. Regardless, you should make your wishes well known to your heirs.

With a little planning, you can include the community in your estate and leave a legacy that changes lives – in your name – for generations to come. I encourage you to speak to your accountant, attorney, or financial advisor, or call us at the Community Foundation of the Great River Bend and we'll guide you through the simple process that will have a lasting impact. ■

## Dick Kleine Begins New Foundation Role Working with Corporate Donors

When Dick Kleine's term on the CFGRB Board of Directors ended last fall, we knew he wouldn't be able to stay away very long. Dick, a past Board Chair and member of our Legacy Society, is joining Hap Volz and Jim Horstmann as one of our distinguished volunteers.

Dick will direct our corporate relations efforts, and will reach out to large and small businesses in our region to let them know how we can serve them in achieving their corporate philanthropy goals.

"The Community Foundation is an excellent resource to connect companies with community needs," Dick says. "Businesses do a lot of good in the Quad Cities region and they support a lot of great causes. The Foundation can make the process easier for them."

Dick brings a lot of corporate experience to his new role. He was a vice president with Deere and Company before retiring. In his new volunteer role, he'll serve as a liaison connecting current and prospective corporate donors with causes that matter in the community.

"When I talk with a corporate audience, I won't just talk about corporate giving," Dick says. "Individuals in the company may not

be aware that establishing a fund at the CFGRB can help them meet their giving goals to have a positive impact in our community. I will share with them how they can become involved individually and with their families to establish their own legacy."

Dick was one of the community leaders instrumental in getting the Achieve Quad Cities project off the ground. The aim of Achieve Quad Cities is to boost the graduation rate at area high schools.

Volunteering is not something new for Dick. He has been very active with other organizations and his church, and he has spent countless hours helping the Community Foundation. To honor his service, he was awarded the Foundation's Shining Star Award at our annual celebration last September. It's awarded each year to an outstanding volunteer. We look forward to working with Dick as he takes on his new volunteer role. ■



Dick Kleine

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## Online Tools Keep You Updated



## on Foundation and Funds

It's easier than ever to keep up-to-date on the Community Foundation. We have several online tools that help you monitor the needs of our community, news and important developments here at the Foundation, and your funds.

The blog is our Foundation's "newspaper," where you can see news updates on issues and events, stories about our donors, Board and staff, and updates that show how your gifts are making an impact. You can subscribe to the blog and receive notices each time a news item is posted, or you can visit on a regular basis and check it out. The news is constantly changing. Visit the blog at [www.susanskora.org](http://www.susanskora.org).

Our website is your window into the Foundation. There, you can find grant forms, scholarship applications, news releases, videos, and information about our Board and staff members. You can even donate online. Go to our site at [www.cfgrb.org](http://www.cfgrb.org).

MyFund is an online program that allows donors to access all of your fund information from the comfort of your home. With just a few clicks, you can check your fund balance, review fund history and even recommend grants. You can get to MyFund on the home



page of our website at [www.cfgrb.org](http://www.cfgrb.org) (there's a link on the left side of the home page).

There are other ways to stay in touch – follow us on Twitter at [www.twitter.com/cfgrb](http://www.twitter.com/cfgrb). You can also follow us on Facebook. Just search for "Community Foundation of the Great River Bend" to find our Facebook page.

You no longer have to wait for newsletters like this one to find out what's happening at CFGRB. If you have questions on any of these online activities, contact Ken Gullette, Director of Communications, at (563) 326-2840 or email him at [kengullette@cfgrb.org](mailto:kengullette@cfgrb.org). ■