



OKOBOJI
FOUNDATION

COMMUNITY FOUNDATION FOR IOWA GREAT LAKES REGION

REPORT TO THE COMMUNITY



The Okoboji Foundation is the centerpoint of community giving, providing leadership and building beneficial partnerships to make a lasting positive impact in the Iowa Great Lakes Community



Through your generosity we have worked for many years to preserve what is wonderful about the Lakes and help to ensure its future.

– Pat O'Brien, Board Chairman

Dear Okoboji Foundation Friends:

I am glad to greet you as Chair of the Board of the Okoboji Foundation. When I moved here, the Foundation impressed me as the best way to give back to the community.

These lakes have been here forever and people have been coming to this area for over a hundred years. It's beautiful, it's fun and it's memorable. Families who live and work here and families who come in summer enjoy this special atmosphere and the memories that take us back, sometimes for generations.

The Okoboji Foundation is dedicated to that history and to that future. Our friends and donors share that vision and know it's important. Through your generosity we have worked for many years to preserve what is wonderful about the Lakes and help to ensure its future. The parks, the trails, the water quality, the recreational life here are just part of what we have supported. The Okoboji Foundation has placed itself at the center point of giving in the area.

Our dedication to this community has not waived as this recent pandemic crisis is a threat and a burden on all of us. In response, Okoboji Foundation has taken a look at its responsibility to our area and developed the Okoboji Foundation Disaster Recovery Fund. With this money we hope to relieve some of the personal stress in our communities. I hope all of us feel we can give back to our Lakes area which has given us so much.

Please stay healthy and safe. When all this clears, come and enjoy.

– Pat O'Brien, Board Chairman

Board of Directors

Walter Carlson
Dan Carson
Michele Goodenow
Joan Gronstal
Terri Jackson
Ryan Johnson
Pat Lloyd
Amy Maris
Kelcey Morrison
Pat O'Brien
Mark Peterson
Chris Quance
Kathryn Schuster
Kory Smith



2020 Grantees



Since 1988, the Okoboji Foundation has granted over \$4.1 M to 79 Lakes Community Nonprofits for Vital Capital Projects



\$75,000

Dickinson County Trails Board

Tatanka Ska Trace – Rail Trail Phase III

A multi-phase project to convert the former Iowa & Northwestern Railroad into a recreational trail. This phase includes a 10-foot wide concrete trail starting at 219th Avenue in Spirit Lake and traveling west for 1.6 miles to connect to the West Okoboji Trail.



\$50,000

City of Okoboji

Speier Park Pickleball Complex

The construction of a dedicated 4-court pickleball complex located in Speier Park. The complex will be available to the public as a year-round recreational asset for all who live in and visit the Iowa Great Lakes.

Invented in 1965, pickleball is played by over 3.3 million people and is the fastest growing sport in the US.



\$75,000

Spirit Lake Community School District

Spirit Lake Community Park

This 18-acre park will include recreational activities such as tennis, pickleball, bocce ball, shuffleboard, basketball and a modern rubber playground. A lighted pathway featuring art sculptures will guide visitors through the park.



\$25,000

Historic Arnolds Park Inc.

Midway Refresh

A midway refresh will allow visitors the ability to enjoy a fresh experience and promote economic development in the Iowa Great Lakes. Existing games and rides will be replaced and remodeled along with some new additions.



\$25,000

Iowa Rock 'n Roll Music Association, Inc.

Digital Museum Interactive System

A digital interactive system for the Iowa Rock 'n Roll Hall of Fame Museum that includes a 2-3-minute video with interviews, photos and clips to properly honor each of their inductees.



Disaster Recovery Fund Grantees

The Okoboji Foundation Disaster Recovery Fund was activated in response to COVID-19 pandemic. It provides flexibility to respond to needs not met by existing non-profit, local, state and federal programs. Donate online at okobojifoundation.org and click on Okoboji Foundation Disaster Recovery Fund.

Over \$22,000 has been granted to the following:

- \$8,822 – Lakes Regional Healthcare Foundation
- \$6,500 – Historic Arnolds Park
- \$4,000 – Voluntary Action Center
- \$2,000 – Bedell Family YMCA
- \$2,000 – Well Food Pantry



Youth in Philanthropy

Established in 2010, Youth in Philanthropy empowers and challenges youth to identify community needs and build a sense of social responsibility while teaching the next generation the importance of community giving and illustrates how a small energized group can make a vital difference in a community.



Youth in Philanthropy led me to recognize that families and individuals are very willing to give back in betterment of the communities and organizations that are significant to them.

– MacKenzie Veldman, YIP Alumna



2019-2020 Youth in Philanthropy Students: Front l-r: Carly Jo Ahrenstorff, Lauren Duffy, Olivia Smith, Lexi Duffy, Haley Hallengren, Brianna Brands, Maddy Waterhouse Middle: Paul Conover, Avery Smith, Danielle Christoffels, Veda Danbom, Elle Waterhouse, Adrie Stecker, Kacey Krieger, Gracie Hamm, Carly Carstens, Ben Fisher. Back: Jacob Lamb, Mason Vander Pol, Olin Myhre, Tyler Adams, Evan Winter, Brock Petersen, Michael Dulin, Finley Hoiem, Mason Stover, Cail Donkersloot

**2019 –2020 YIP raised \$82,000 with \$66,072
for grants steered by student decision**



Since 2010...

\$424,570
raised

dollars
granted:
\$315,802

154
student
alumni

2020 YIP Grantees

\$24,483 - Iowa Lakeside Lab
Big Spirit Lake water quality buoy

\$10,000 - City of Milford
Enclosed Florence Park shelter addition

\$10,000 - OF Disaster Recovery Fund
Assist those affected by COVID-19

\$9,089 - Hope Haven
Spirit Lake building renovation

\$7,500 - Lutheran Lakeside Camp
Trail improvements

\$5,000 - Dickinson County Fair Board
New cattle shed

Legacy Society

When you make a gift to the Okoboji Foundation in your will or estate plans, you make a Ripple of Good that flows throughout the lakes community . . . forever. The Legacy Society recognizes those caring individuals who have included us in their will or estate plans. Honorary membership in the Legacy Society is our way of expressing our deep gratitude for joining us to create your personal Lakes Legacy.



We wanted to create a legacy by showing our children and grandchildren that you are never too young or old to give and that any form of donation will help your community. The Okoboji Foundation makes it easy to give and you can see the lasting impact you are making in the community you love.

– John and Karen Goodenow, Legacy Society Members



Members of the Legacy Society gather annually to enjoy the company of others who care about leaving a legacy to their community beyond their lifetime.

Legacy Society Members

Les & Kathy Banwart, Tom & Becky Batcheller, Berkley* & Elinor* Bedell, Tom & Molly Bedell, Michael & Margie Bennett, Dr. Tom & Marge Boeke, Ted & Mary Jo Carlson, Dan & Carol Carson, Dwight & Marilyn Conover, Carmen DeKoster, Larry & Sharee Den Herder, Kathryn Fahy, John M. & Mary Franken, John & Karen Goodenow, Steve & Michele Goodenow, Hank & Jan Grant, J.P. & Cynthia Greer, Eric & Kelly Hoiem, James & Gail Krambeck, Frank Lorch*, Dr. Walter & Barbara Mendenhall, Dr. Pat & Jody O'Brien, Ginny Peterson, Mark & Polly Peterson Arthur* & Helen* Ruebel, Barry & JoAnne Sackett, Kirby Sampson, Rod & Lynette Sather, Norma Schmitz*, Doug & Amy Skinner, Dr. Paul & Holly Skopec, Tom & Kathy Walsh, Joan Williams*, Margy Wood, George James Jr. Stewart*

Loved ones remembered in 2019 beyond their lifetime through a gift to the Okoboji Foundation:

Ann Chozen ▪ Berkley Bedell ▪ CJ Jenne ▪ Harriet Ostermann ▪ John Sather ▪ Lynda Marie Chase
Mary Cornell ▪ Ralph "Boober" Schneider ▪ Ruth Campbell ▪ Scott Schlatter



Charitable Giving Partners

Charitable funds established by donors with unique charitable goals and interests.

OKOBOJI FOUNDATION FIELD OF INTEREST FUNDS

- Arts & Culture
- Lake Quality & Environment
- Outdoor Experiences & Recreation
- Youth in Philanthropy
- Okoboji Foundation Operations

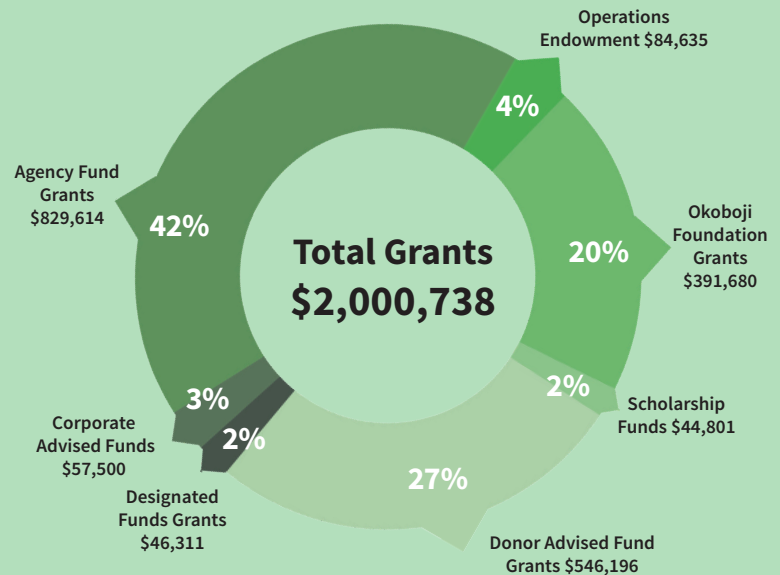
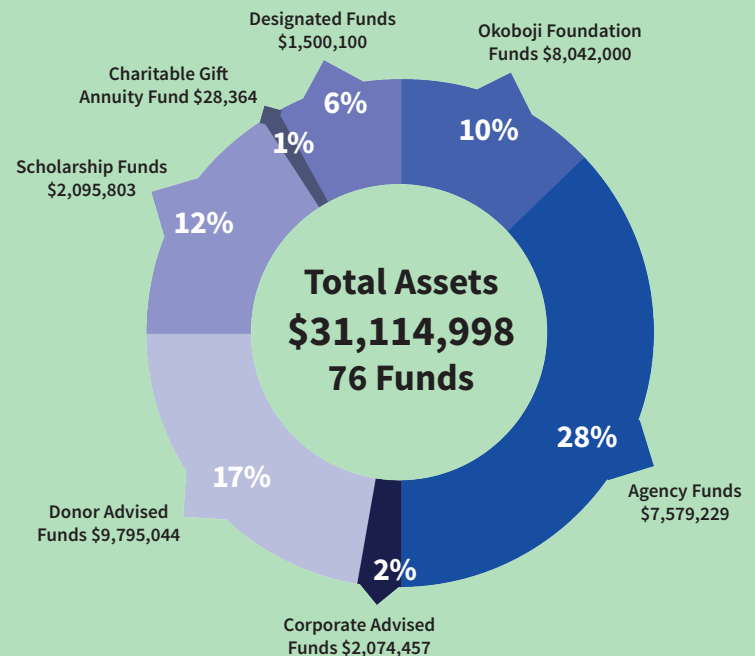
NONPROFIT PARTNER AGENCY FUNDS

- Bedell Family YMCA, Camp Foster & Kinships Funds
- Dickinson County Endowment Funds
- Dickinson County Nature Center
- Dickinson County Trails Board Funds
- First Lutheran Church of West Okoboji Funds
- First Presbyterian Church of Spirit Lake Funds
- Friends of Lakeside Lab Funds
- Historic Arnolds Park Endow Iowa Fund
- Imagine Iowa Great Lakes Fund
- Iowa Lakes Community College Foundation Funds
- Iowa Lakes Corridor Entrepreneurial Development
- Lakes Regional Healthcare Foundation Funds
- Mini-Wakan Shelter & Gull Point Lodge Funds
- Okoboji Community School Foundation
- Okoboji Summer Theatre
- Okoboji Yacht Club Sailing School Funds
- Pearson Lakes Art Center Funds
- Spirit Lake Community School Foundation Funds

DONOR ADVISED & DESIGNATED FUNDS

- Anonymous
- Bank Midwest Funds
- Banwart Fund (Kathy & Les)
- Christensen Fund (Lloyd "Shorty")
- Den Herder Family Fund (Sharee & Larry)
- Evans Family Fund
- Goodenow Family Funds
- Hoiem Family Fund (Kelly & Eric)
- Keep Okoboji Blue (Deidre Rosenboom)
- Jackson Family Fund (Terri & Steve)
- Johnson Family Fund (Tamera & Brent)
- Kinnetz Family Fund (Tim & Joren)
- Mendenhall Family Fund (Barbara & Walter)
- Sather Fund (Rodney)
- Schmitz Family Funds (Norma*)
- Simonson Family Fund
- Skinner Fund (Amy & Doug)
- Wood, Margy CGA Fund

Financials at a Glance (as of December 31, 2019)



Lifetime Giving Tribute

Thank you to all our donors.

Benefactor \$250,000+

Bank Midwest
Goodenow, John and Karen
Goodenow, Steve and Michele
Northwest Bank
Peterson, Mark and Polly

Visionary \$100,000+

Bedell, Berkley*, Elinor*
Bedell, Tom and Molly
 Berkley, Inc - Pure Fishing
 Blum, Sara*, Mike
Conover, Dwight and Marilyn
Conover, C.B. „Neal“ and Kitty
Hoiem, Eric and Kelly
 IES Utilities Inc.
Mendenhall, Dr. Walter and Barbara
 Ross Family Fdn, Hobart*, Alta*
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Ambassador \$50,000+

Banwart, Les and Kathy
 Bascom, Arthur*
Bennett, Michael and Margie
 Bocken, Jeff and Megan
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Peterson, Ginny
 Pomerantz, Rose Lee*, Marvin*
 Scribante, Marguerite
 US West Communications
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Advocate \$25,000+

Corvette Club, U Of Okoboji
Den Herder, Larry and Sharee
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Vos, Gary and Marilyn
Walsh, Thomas and Kathy

Partner \$10,000+

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 Cory, Connie, Ace*
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 Currell, Greg J.
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 Dunscombe, Thomas and M.A.
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Griffin, Mark and LeAnn
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Lauridsen, Nancy
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Richter, Herman and Paula
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Wikert, Marty, Dick*
 Williams, Joan*
 Wilson, Fred, Joan*
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Wood, Margey

Patron \$5,000+

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 Barry, Rick and Ann
 Batcheller, Tom and Becky
Beck, Brad and Teresa
Benit, Gordon and Bette
Bernstein, Jack and Gail
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 Burnett, Bob and Gloria
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Dixon, Robert and Bonnie
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 Jenkins, Robert and Sara
Jensen Real Estate
Jensen, Jim and Diana
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 Johnson, Rick and Nadine
Kiliper, Randy and Marianne
 Kirke, Gary, Joan*
Krause Gentle Foundation
 Lakes Regional Healthcare
Liberty National Bank
Lloyd, Craig and Pat
 Luchtel, Jeff and Kae
 Marten, Martin and Melinda
Matthiesen, Matt and Michaela
 Mau, Richard and Donna C.
 Metz, William and Nancy
 Mitchell, Carlton and Lois
Montgomery, Dick and Mary Jean
Morrison, Jeremy and Kelcey
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 Mugge, Ann
Narey, Darleen, Pete*
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The Three Sons
 Tjaden, Kurt and Kristyn
 Tollefson, Jeff
 Van Steenburg, Arthur and Mary
Veldman, Terry and Stephanie
von Schrader, Mary
Walden Charitable Foundation
 Wells Fargo Advisors
 Wicks, Bunny and Ralph
 Wiegman, Sybil
 Wolfe, Richard*, Nancy*

Those listed in bold added an investment in 2019. *Donors whose lasting positive impact continues beyond their lifetime.

www.OkobojiFoundation.org



Ways to Make Your *Ripple of Good*

-  **Okoboji Foundation Endowment & Endow Iowa**
flexibility for grants to address wide variety of most urgent community projects
-  **Okoboji Foundation Operations Endowment**
to ensure professional, effective donor services and resource management
-  **Field of Interest**
grants specifically for Arts & Culture, Lake Quality & Environment or Outdoor Experience & Recreation projects
-  **Youth in Philanthropy**
YIP teaches the next generation the importance of community giving with grants steered by students
-  **Charitable Giving Funds**
establish your own Charitable Fund to simplify giving by directing grants to specific charities you select (*view list of funds at okobojifoundation.org*)
-  **Legacy Society**
include the Okoboji Foundation in your will or estate plans to continue giving to the places you love beyond your lifetime

Endow Iowa Tax Credit Available to Donors

Those who give to a permanently endowed fund at a qualified community foundation or affiliate organization are eligible to receive 25% tax credits for their gifts. Donors who give are also able to take advantage of the tax credits in conjunction with federal tax deductions.

Endow Iowa

We accept gifts for Okoboji Foundation & Charitable Giving Funds through our affiliation with the Community Foundation of Greater Des Moines, an organization that meets National Standards for U.S. Community Foundations and Endow Iowa Tax credits. (EIN 42-6139033).

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