Treating community like home and family

Robert J. and Elizabeth G. McCoy Endowment Fund

A blind date. That's all it took to start a lifetime of love for family and community for Bob and Betty McCoy.

Bob, a WWII veteran and Waterloo native, met Betty in her hometown of Madison, Wisconsin where he had graduated from college. Immediately after being married, the couple moved to Waterloo where Bob was publisher at the Waterloo Courier for 31 years. Betty remained at home dedicating her time and devoting her life to their three children, Jack, Kathy and Bill.

For 47 years of marriage, the couple lived in Waterloo, raising their children and nurturing the community through volunteer efforts with many charitable causes. Their loyalty and love of community made it a better place, not only for their children, but for everyone.

Bob and Betty also understood the importance of giving back financially to the community during their lifetime, and worked with the Community Foundation of Northeast Iowa to leave a permanent legacy for the community they loved.

In 1994, they established a Charitable Remainder Trust naming the Community Foundation as the beneficiary.

Bob passed away in April, 2000, and after Betty's death in January, 2016, the Robert J. and Elizabeth G. McCoy Endowment Fund was established to benefit charities in their hometown.

It is just one more gift to add to a long legacy of giving according to son, Jack McCoy.

"This gift to the endowment fund personifies our parents' lifelong commitment to Waterloo, but is only one of many gifts to universities, relatives, friends and strangers they learned needed a hand," said Jack.

Kathy McCoy, daughter and fund advisor, echoes the kindness and generosity her parents modeled every day for family and community.

"Anything about my brothers and me that is good or kind or nice comes directly from our parents," said Kathy. "They truly lived their lives as everyone should, as good, kind, compassionate people."

Together, Bob and Betty were role models in showing the importance of taking ownership of one's community and treating it with the same respect you treat your own family.

"The community was their life,"said Kathy. "They wanted nothing but the best for Waterloo and the whole community."

OUR MISSION
To inspire people and connect resources to enrich our communities.

Visit cfneia.org

go online for more
RENAL OF NATIONAL STANDARDS STRENGTHENS OUR FOUNDATION

In July, we were reconfirmed in our accreditation with the nation’s highest standards for philanthropic excellence. We are proud to be the only local community foundation confirmed in National Standards in our region.

Earlier this year, we introduced our new values: service, collaboration, accountability, inclusion, sustainability and strategic thinking. We hold these words in high esteem here at the Community Foundation of Northeast Iowa. Reconfirmation in our accreditation shows they are more than words, but actions we live out every day.

Yes, I am bragging here, but this is an important piece of who we are, and we hope it is important to you as well. We are proud of our Foundation’s history of accreditation, since 2005, and the commitment and pride our staff and volunteers take in ensuring we uphold these standards.

The National Standards for U.S. Community Foundations program requires community foundations to document their policies for donor services, investments, community foundations to demonstrate our commitment to transparency, quality, integrity and accountability. Accreditation also allows donors to make planned gifts, they put their trust in us. They count on us to manage the investment wisely and honor their charitable wishes. This accreditation demonstrates our commitment to.

In celebration of our 60th anniversary, the Community Foundation of Northeast Iowa is holding the Good Things Happening photo contest. By submitting a photo showing good things happening in Black Hawk County you could have the opportunity to make a grant to your favorite nonprofit serving Black Hawk County.

$13,000 IN GRANTS AVAILABLE

Each week of the six-week contest, 10 individuals will win a $100 microgrant to award. Nine winners will be selected by community judges and one will be selected as the popular pick by number of “likes” on our Facebook page.

All winners will be eligible to receive one of two grand prizes; a $5,000 grant or a $2,000 grant to award to a nonprofit serving Black Hawk County.

Share the good things you see happening in Black Hawk County. Go to cfneia.org/goodthings to read contest details and submit your photos.

Like the majority of small town fire departments, the Fort Atkinson Fire Department is completely volunteer driven. In small towns across Iowa, funding for staff is typically impossible, so it’s up to town citizens to volunteer their lives for the safety of their community and its residents.

“The thing about it all is that our volunteers care about the community. They are community-minded and care about the welfare of their neighbors and friends. It’s the commitment to be there to help others – that’s the key. If people weren’t committed to it or didn’t enjoy it or didn’t want to give something back, we would all be real hurt,” said Fort Atkinson Volunteer Fire Department Chief, Ron Franzen.

Franzen has been Fort Atkinson’s Fire Chief for 41 years and remains passionate about his community, his duties, and the safety of his firefighters. With tight budgets and increasing challenges in recruiting volunteers, departments across the county are struggling according to Franzen. The importance of the services provided does not always equate to the necessary funding to support the fire department’s function, or the sacrifice of the brave men and women serving as volunteers.

Thankfuly for the Fort Atkinson Fire Department, the Winneshiek County Community Foundation, an affiliate of the Community Foundation of Northeast Iowa, has stepped up to help meet financial needs to keep firefighters safe.

In 2016, the Winneshiek County Community Foundation granted $5,000 for new turnout gear. This is personal protective gear worn by firefighters. Each year, the Fort Atkinson Fire Department takes inventory of their gear to determine what needs its grant application should address. Over the years, the fire department has received grants that have gone toward refurbishing a truck, thermal imaging cameras, a gas meter, radio equipment and continued updates of the safety gear worn by the crew.

Since 2006, the department has received grants totaling over $36,000. Each item purchased through grants has gone directly into improving the safety of the firefighters and the communities they serve.

Affiliate foundations across our region are making grants to essential government entities, like fire departments, that allow people in our communities to live in safe and vibrant environments.

Thank you to all those who serve our communities.

MORE RESOURCES FOR YOUR COMMUNITY FOUNDATION

If you love the grants CFNEIA or any of its affiliates give through the competitive grant process, you can help increase the amount they can give to deserving nonprofits and government entities.

Go to cfneia.org/fundfinder, type in ‘impact fund’ and select the affiliate you want to support. The impact fund increases dollars available for local committees to use for grantmaking.
Agency endowment funds provide unique year-end giving opportunity

As the end of the year approaches, many families and individuals look for ways to make an impact on their communities through a gift to a nonprofit whose work they care about.

Agency funds held with CFNEIA are a great way to carry out this wish. Just over 200 nonprofit agencies hold funds with the Community Foundation of Northeast Iowa. Endowed agency funds are a consistent, yearly source of income for these organizations and have most often been created to ensure long-term stability.

By making a gift to an agency fund, you build the nonprofit’s fund, increasing the amount available each year for the organization to use to provide critical support to its mission.

The added benefit to making a gift to endowed agency funds held with CFNEIA is that your gift is eligible to receive the Endow Iowa 25% state tax credit.

To make your year-end gift to one of our agency funds, go to cfneia.org/fundfinder. Here you can create a custom search to find a nonprofit fund that matches your passion.

Don’t see your favorite nonprofit on our list? You can create a fund for the nonprofit you support. Contact our development team at 319-287-9106.

Endow Iowa tax credits limited toward year-end

Endow Iowa state tax credits are an incredible incentive for making gifts to impact Iowa charitable projects. This tax benefit continues to gain popularity among generous people who want to create a positive impact in their community.

As more people utilize the Endow Iowa program, the faster the $6 million in credits per year are used. As we approach the end of the year, limited credits are available for 2016. Individuals and families wishing to take advantage of these remaining credits for 2016 should act now. Our staff can assist you in making sure your Endow Iowa paperwork is completed as quickly as possible.

There is good news though for those who make a gift in 2016 even after the credits are no longer available. Qualified gifts made after the 2016 credits are gone will be first in line to receive 2017 Endow Iowa credits for this year’s gift.

Those wanting to maximize their giving by utilizing the 25% state tax credit may do so by making a gift to an already established permanent endowment fund impacting an Iowa charitable cause, or by establishing a fund meeting the same criteria. Funds must be held with a community foundation accredited in National Standards for U.S Community Foundations, like CFNEIA.

To read more about the Endow Iowa 25% state tax credit, and find a link to view available credits, go to cfneia.org/endowiowa.

Agency Fund Advantages

A professional advisor’s view with Jessica Jenkins, MSF, CFP®
Financial Advisor Peters, Jenkins and Associates

Q: Why do you bring up CFNEIA in your conversations with clients?
A: For many reasons, but probably the biggest reason I share the benefits of giving through the Community Foundation with clients is due to the vast amount of agency funds covered under CFNEIA. Many of our clients are already gifting to those agencies.

If they are gifting directly to the agency itself that’s perfectly fine, but if their tax situation would benefit from the Endow Iowa Tax Credit I encourage them to make a gift to the agency fund held with the Foundation. This allows them to support those same agencies and take full advantage of the benefits available to them.

Q: How beneficial is having nonprofit agency funds at the Foundation as an option in regard to estate planning?
A: Having the nonprofit agency funds available to gift through the Community Foundation makes the gifting process a much more streamlined event from the client’s perspective and an advisor’s perspective.

When a client gifts annually to specific organizations, most likely they wish to leave a legacy for those same organizations. The staff at CFNEIA work directly with our clients in order to coordinate the list of charitable organizations that the client wishes to support at their death. In turn, the client names the Community Foundation as their sole beneficiary on their accounts with us. They have written out their wishes with CFNEIA so that the estate settlement process is virtually painless.

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Grantmaking Snapshots

**NEW HAMPTON ELEMENTARY OSMO/TIGGLY CENTERS**
Teachers at New Hampton Elementary were provided with Osmo and Tiggly products, digital interactive devices programmed with common core curriculum. The programs allowed teachers to meet with small groups while ensuring the rest of the class was highly engaged with standard-meeting work. With these new programs, students are interacting with each other while learning how to process and solve real world problems with the use of actual manipulatives.

**PROJECT: NEW HAMPTON ELEMENTARY OSMO/TIGGLY CENTERS**

**VETERANS MEMORIAL**
Amvet Post 102’s mission to honor deceased veterans has received support and only positive feedback from Aplington residents. Amvet members populated the cemetery with five Branches of Service flagpoles and twenty Avenue of Flags memorials. Since the installations, cemetery traffic has seen an increase. In addition to the flags, the Amvets have acquired a memorial stone and together, the new fixtures have enhanced the cemetery and have provided a designated place to hold the Amvet Post’s Memorial Day Program.

**PROJECT: VETERANS MEMORIAL**

**BIKE SAFETY IN FAYETTE COUNTY**
Thanks to the Upper Explorerland Regional Planning Commission and the Fayette County Community Foundation, 190 county youth will have a helmet to wear every time they ride a bike. Handing out protective gear was just one element of the program. In addition, the youth received bike safety instruction. By the end of October 2016, the project will have educated 355 Fayette County youth about bike safety through Bike Rodeo events.

**PROJECT: BIKE SAFETY IN FAYETTE COUNTY**

**NEW HAMPTON COMMUNITY SCHOOL DISTRICT**

**APLINGTON AMVET POST 102**

**UPPER EXPLORERLAND REGIONAL PLANNING COMMISSION**

**FUNDS ESTABLISHED BETWEEN FEBRUARY 18, 2016 AND SEPTEMBER 13, 2016**

- Nashua-Plainfield FFA Alumni Endowment Fund
- Dr. Rudy R. Kubik Scholarship Fund
- Lynn and Kathy Griff Heritage Fund
- Mark and Carol Schulin Memorial Scholarship Fund
- Joshua Christian Academy Fund
- Five Island Trail Endowment Fund
- Tjossem Family Fund
- Say YES, Inc. Charitable Fund
- Cdr. Ike Leighty AMVETS Post 49 Charitable Fund (Quasi)
- Dick Guilgot and Barb Sokol Fund
- Shrine of the Grotto of the Redemption Endowment Fund
- Rand and Angela Determan Family Fund
- Amana Heritage Society Endowment Fund
- Fredericksburg Community Foundation Fund
- CUSB Bank Designated Fund
- CUSB Bank Scholarship Fund
- Emmetsburg Educational Foundation Scholarship Fund
- Riceville Ambulance Service Endowment Fund
- Philip and Phylis Borrieske Community Impact Fund
- Jacob’s Ladder Fund (Quasi)
- West Bend Friends of the Library Fund
- Kendra Kleespie Scholarship Fund

**CONTRIBUTIONS TO QUALIFIED FUNDS ARE ELIGIBLE TO RECEIVE THE ENDOW IOWA TAX CREDIT. FOR MORE INFORMATION GO TO CFNEIA.ORG OR CALL US AT 319-287-9106.**

If you have questions regarding the portal or want to set up your account, please contact us at donorrelations@cfneia.org.

**Funds Portal provides powerful tool for fundholders**

The Community Foundation of Northeast Iowa introduced its new funds portal in April of this year, and many fundholders have taken advantage of this new tool.

The funds portal gives our fundholders greater convenience and access to their fund(s) with the Community Foundation.

The secure online portal allows you to:
- View current and historical fund statements
- View your fund balance and current grantable balance
- Make grant recommendations
- View grant and gift history

**Women in Philanthropy continues outreach with volunteer opportunity**

CFNEIA’s Women in Philanthropy group gathered at the Northeast Iowa Food Bank for its fall meeting during Hunger Action Month in September.

The group learned more about the critical work of the Food Bank, touring the nonprofit’s facility. The women also volunteered, packing backpacks which provided a weekend food source for 300 children in need.

If you are a woman interested in impacting the lives of women and girls in Black Hawk County, get more information on our website at cfneia.org/womeninphilanthropy.
The Community Foundation of Northeast Iowa is a nonprofit committed to creating long-term impacts in 20 counties in Iowa. CFNEIA helps people establish funds for the causes they care about and makes grants to organizations creating a stronger and more vibrant quality of life for everyone.

**Our Mission**
To inspire people and connect resources to enrich our communities.

**Our Vision**
A vibrant region of thriving people.

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**CFNEIA SERVICE AREA**

- **CFNEIA Office**
- **County Affiliates**
- **Community Affiliates**

Ackley Community  Grundy County
Benton County  Howard County
Bremer County  Iowa County
Black Hawk County  Kossuth County
Buchanan County  Palo Alto County
Butler County  Readlyn Community
Cerro Gordo County  Tama County
Chickasaw County  Waterville Community
Elma Area Community  Waverly Community
Emmet County  Winnebago County
Fayette County  Worth County
Floyd County
Franklin County

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**Endow Iowa Tax Credit**

CFNEIA is a qualified community foundation that provides access to Endow Iowa Tax Credits. Taxpayers can receive a 25% Iowa tax credit though Endow Iowa in addition to normal federal charitable income tax deductions for certain charitable gifts.

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CFNEIA is Confirmed in Compliance with National Standards for U.S. Community Foundations.

Our accreditation provides assurance that we have sound policies and practices in place. In short, it means we meet the highest standards for local giving.