

WELCOME



Omaha Community
Foundation

Introduction



Nathan Morgan
Donor Services Advisor



Dasia Horne
Sr. Program Manager



OCF 101: Get to know the Omaha Community Foundation



Today's agenda

- What is a community foundation?
- Who do we serve?
- How do we do our work?
 - Community Investment Department
 - Donor Services Department
 - Philanthropic Services Department
 - Southwest Iowa Foundations
 - Finance Department
- Questions



Our Mission and Vision

Mission

We maximize the power of philanthropy to strengthen our community.

Vision

A connected community of passionate philanthropists, strong nonprofits, and thriving residents.





What is a Community Foundation?

- 900+ community foundations nationwide
- Structure: 501(c)(3)
- National Standards Accreditation
- Giving tools
 - Charitable giving funds
 - Concierge level service
 - Community connections
 - Partner grantmaking

Who We Serve



NONPROFITS

- Fund for Omaha
- African American Unity Fund
- Futuro Latino Fund
- Equality Fund
- Refugee Community Grants
- Neighborhood Grants Program
- Nonprofit Capacity Building
- Field of Interest Funds



COMMUNITY

- The Landscape
- CAP® Program
- Omaha Venture Group
- Community Loan Fund
- Community Resilience Fund
- Government Partnership Grantmaking



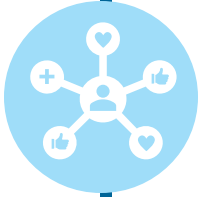
DONORS

- Giving Funds
- Legacy Giving
- Private and Family Foundations
- Corporate Giving

Our Value Proposition



Local & Nonprofit Knowledge



Network & Partnerships



Philanthropic Expertise



OCF's Impact

- **2,000+** Donor Funds
- **\$240M** in grants processed in 2024
- **17,000+** grants to **3,200** nonprofits



OCF Departments

- **Community Investment** - oversees OCF's grant programs and maintains a deep knowledge of community needs and nonprofit landscape in our community.
- **Donor Services** - manages relationships with fundholders and works with prospective fundholders
- **Philanthropic Services** - provides administrative and support services to private and family foundations.
- **Marketing & Communications** - Shares OCF's story with the community, spearheads fundholder communications.

Finance - manages accounting and insures financial stability and integrity of OCF's finances



Who Makes It Happen: Leadership Team



DONNA KUSH
President & CEO



MELISA SUNDE
Chief Financial Officer



VANESSA DENNEY
VP of Philanthropic and Donor Services



KATIE VOGEL
Donor Services Director



TESSA BARNEY
Philanthropic Services Director



ANNE MEYSENBURG
Community Investment Director



MEGAN BARRETT
Marketing & Communications Director



SUNNI KAMP
Southwest Iowa Foundations Director

MARKETING/COMMUNICATIONS



MEGAN BARRETT
Marketing & Comms
Director



ALLY KARSYN
Content Manager



MOLLY MULLEN
Content Manager



MIKE LUCE
Business Analyst

DONOR SERVICES



KATIE VOGLE
Director of Donor
Services



CHAD ALLEN
Donor Services
Advisor



WYNTER DAVIS
Donor Services Advisor



**EYERUSALEM
GEHRINGER**
Process and Database
Administrator



**NATHAN
MORGAN**
Donor Services
Advisor

COMMUNITY INVESTMENT



**ANNE
MEYSENBURG**
Community Investment
Director



**DASIA
HORNE**
Senior Program
Manager



**LAURA
CONTRERAS**
Senior Program
Manager



AARON KOONTZ
Grants Program
Administrator



KELLY NIELSEN
Pathways Director



KRYSTAL FOX
Pathways Operation
Manager



JUSTINE OLSON
SECTOR IMPACT
STRATEGY MANAGER

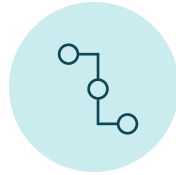
Our Role: Convener & Connector



Community Interest Funds

Further equitable grantmaking by engaging residents in decision making.

1. Omaha Neighborhood Grants
2. African American Unity Fund
3. Futuro Latino Fund
4. Equality Fund for LGBTQIA+
5. Refugee Community Grant Fund

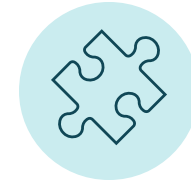


Fund for Omaha

Learn about needs and innovative work. Share unfunded proposals with OCF donors.

Priority Areas

- Housing & Neighborhoods
- Economic Opportunity
- Maternal Health & Birth Outcomes
- Mental & Behavioral Health



Capacity Building

Invest in effective leadership and strong governance, specifically supporting leaders who are people of color. Support nonprofits that pursue strategic collaborations.



The Landscape: Knowledge to Drive Impact & Strategy

1. DATA ANALYSIS

8 Landscape Focus Areas that include 41 Indicators based on publicly-available data:

- Health (10 indicators)
- Neighborhoods (4 indicators)
- Safety (4 indicators)
- Transportation (4 indicators)
- Workforce (4 indicators)
- Education (8 indicators)
- Civic Engagement (4 indicators)
- Arts & Culture (3 indicators)

Findings published on
OmahaFoundation.org/Research

2. RESIDENT PRIORITIES

6 Priorities based on Listening Campaign conducted with local nonprofits and Voices of the Landscape website.

- Social & Support Networks
- Arts, Culture, & Recreation
- Vibrant Neighborhoods
- Financial Stability
- Segregation
- Public Transportation

Findings published in 2018 and 2020 Listening Report.

3. COMMUNITY INVESTMENT STRATEGY

Internal programs' funding priorities aligned to the 8 Landscape Focus Areas to drive investment in the community:

- Fund for Omaha
- Community Loan Fund (Impact Investing)
- Community Resilience Fund
- Omaha Venture Group

Informs a strategy that guides programmatic investment in targeted areas.

4. IMPACT

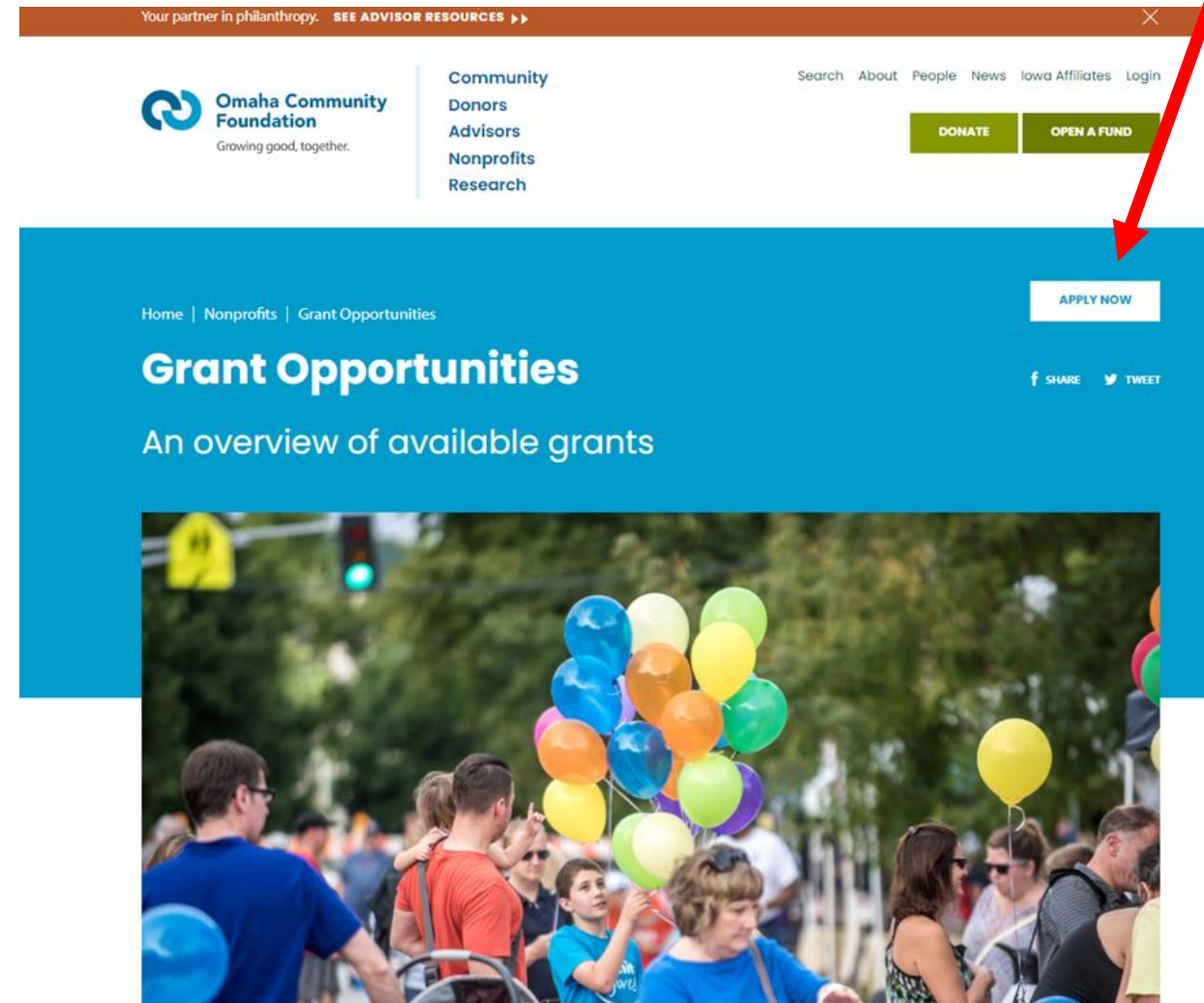
Building on the first three activities, explore opportunities for more in-depth work within the four prioritized areas:

- 1. Maternity Health & Birth Outcomes** - incubating innovative Pathways Community HUB to address health needs through social supports
- 2. Housing & Neighborhoods** - Support tornado recovery efforts through the Tri-County Recovery Coalition.
- 3. Economic Opportunity**
- 4. Mental & Behavioral Health**

Drives community and fundholders towards strategic, collective action.

Community Investment Programs

- **Community Interest Funds:** Jan. 1-March 1
 - Omaha Neighborhood Grants
 - African American Unity Fund
 - Futuro Latino Fund
 - LGBTQIA2S+ Equity Fund
 - Refugee Community Grant Fund
- **Field of Interest Funds:** June 1-July 15
- **Building Healthy Futures:** July 1-August 1
- **Fund for Omaha:** July 1-August 1
- **Nonprofit Capacity Building Program:**
Summer



omahafoundation.org/nonprofits/grant-opportunities/



Our Role: Adaptability to Community Needs

COVID-19 Response Fund

Launched in March 2020, the COVID-19 Response Fund provided immediate assistance to nonprofits to meet increased demand for basic supplies and services.



\$1.5 million granted to 51 nonprofits in 3 months

Community Resilience Fund

Dedicated to supporting Omaha-area organizations serving communities disproportionately affected by COVID-19.



\$530,000 distributed to 37 nonprofits

ARPA Community Grants

The City of Omaha is partnering with the Omaha Community Foundation to assist in developing and administering the City of Omaha ARPA Community Grant Program.



\$10 million awarded for workforce development and violence prevention

CARES Act Grantmaking

The Omaha Community Foundation, in partnership with Douglas County.



\$28 million to support Arts & Human Services organizations.



Three OCF revenue streams that support nonprofits

Donor Services

- Grants from individuals with accounts at OCF
- No application process
- Can be difficult for nonprofits to access
- Follow-up is essential to develop the relationship
- OCF staff remain neutral but can provide information about issues and organizations if asked

Philanthropic Services

- Grants from family foundations that have funds at OCF
- Application process varies by foundation
- OCF provides administrative support, advice on effective grant-making, and philanthropic consulting

Community Investment

- OCF Discretionary Grant Funds
- Fund for Omaha, Community Interest Funds, Field of Interest Funds
- Application process is easy to access
- Decisions made by committee members from community and/or OCF staff
- OCF staff provide grant application assistance



Donor Services & Fundholders

- OCF Advisors support over 2,000 individual fundholders.
- Fundholders can be individuals, families, corporations, or nonprofit organizations.
- Fundholders donate money to OCF, which is deposited into their funds. They get a tax deduction at the time of donation, and then can grant the money out to nonprofits.
- Fundholders can recommend grants to any nonprofit in the United States.
- Fundholders choose the organizations they support. Donor Services Advisors have limited influence over these decisions, though do provide information on request.

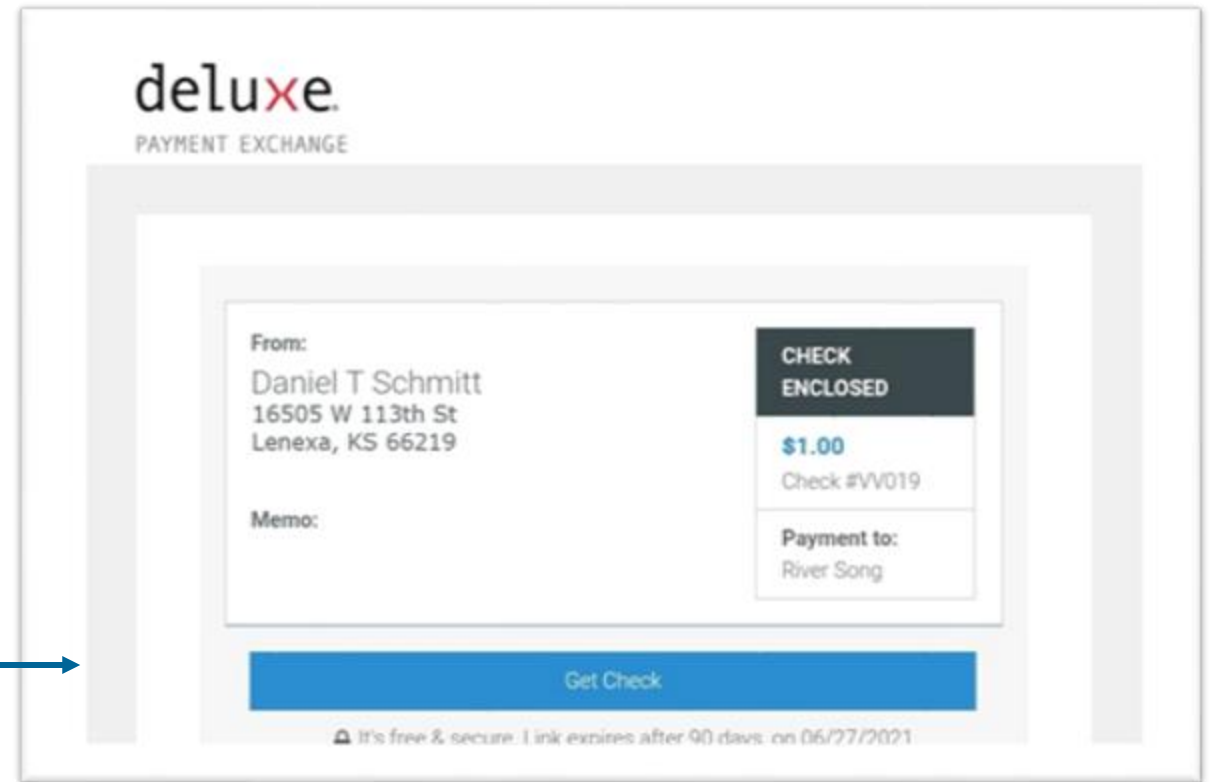


How a Fund Works



How a nonprofit gets a donation from an individual fundholder at the Community Foundation

- Fundholder at OCF recommends a grant to XYZ nonprofit
- Grants Manager ensures XYZ nonprofit is in good standing with the IRS.
- Grants Manager approves the recommendation and creates a grant letter that accompanies the check. Any information we can share about the fundholder will be in the grant letter.
- OCF finance department creates the check.
- Check is sent via email our electronic check vendor. →
- Nonprofit downloads, prints and deposits the check.



Omaha Venture Group

Omaha Venture Group (OVG) is a giving circle that empowers young professionals in supporting local nonprofits and promoting philanthropy.

OVG awards up to \$8,000 to initiatives that spark growth and innovation. Each year, four grants are awarded in the following interest areas:

- Arts and Culture
- Health
- Neighborhoods, Civic Engagement, and Safety
- Workforce and Education



Private Foundation & Family Giving Services

OCF leverages philanthropic, administrative, and financial expertise alongside deep community knowledge to support the needs of individuals, families and private foundations.

Services we provide include:

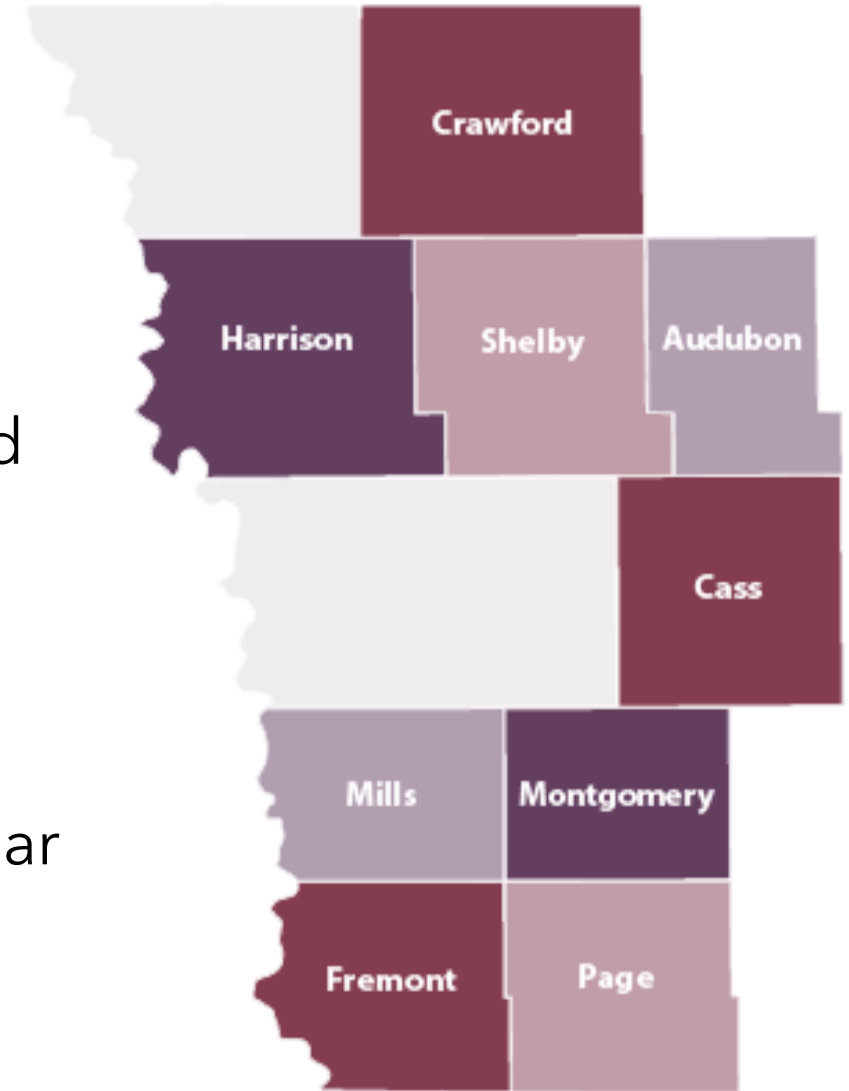
- Administration and Operations
- Effective Grantmaking
- Philanthropic Consulting





Community Foundations of Southwest Iowa

- Nine counties
- Each county has a volunteer advisory board of county residents
- OCF provides administrative and strategic support
- Operate 1-2 grant cycles per county per year
- Programs
 - Endow Iowa Tax Credit
 - County Endowment Program



FINANCE



MELISA SUNDE
Chief Financial
Officer



**MICHELLE
SWANGER**
Controller



YVETTE FRANKS
Accounting Manager



**DIANE
DARRINGTON**
Grants Manager



**KRISTIN
McKENZIE**
Accounting Associate II



JODY SKINNER
Accounting Coordinator

Finance Team

- With more than \$2.2 billion under management, OCF is a large financial institution
- Accounting for over 2,000 individual donor accounts
- Processed more than 17,000 grant checks totaling over \$240 million last year
- Over \$500 million in donations into donor accounts last year



Upcoming OCF Workshops

Endowments, Emergency Funds, and Banking Relationships

March 11 at noon

Security National Bank

Fiscal Sponsorships

April 10 at noon

Goodwill Training Center, 3505 L St., Room 108.

Grant Writing

May 20 at noon

Location TBD

Navigating Funder Relationships

June 17 at noon

Location TBD



Questions?

