



Welcome, and thank you for joining our live Zoom update

Participants will be put on mute once the call begins

Staff will be monitoring the chat room, should you have a question during the presentation

We have reserved time at the end for questions and sharing

The meeting will begin soon



Stephanie Judson, CFP®,
CGPA
President & CEO

2020 A Year in Review

- Coronavirus Response Efforts
- Nonprofit Needs Assessment
- Nonprofit Sector Study
- Investment Performance
- Glimpse into Strategic Plan

Two Arms of the Foundation

Grantmaking

- ✦ South Dakota Fund Grants
- ✦ Community Innovation Grant Partnership with the Bush Foundation

Fund Development/ Management

- ✦ Agency Endowments Funds
- ✦ Community Savings Accounts/
Nonprofit Savings Accounts
- ✦ Designated Funds
- ✦ Donor Advised Funds
- ✦ Scholarship Funds



Ginger Niemann,
Senior Program Officer



Janet Ricketts
Program Assistant

Grantmaking
Team

Grantmaking

Three Prong Approach to COVID-19

Launch of Coronavirus Response
Fund: **\$ 1 million+**

Offered Community Savings
Account Matching Fund Grants:
\$250,000

Reprioritized South Dakota Fund
& Bush Community Innovation
Grants: **\$1 million**

Looking Ahead

SD Fund still focused on
Coronavirus relief efforts

CIG Resumed in 2021:

- Round 1: February 1- 26th
- Round 2: July 1-30th

Nonprofit Needs Assessment

Findings

87% Reported being negatively impacted by COVID

64% Noted decreased donations

38% Unable to meet with clients in person

36% Struggled securing needed volunteers

Partners

Bush Foundation

John T. Vucurevich
Foundation

South Dakota Community
Foundation

United Way of the Black Hills

Nonprofit Capacity Building

Increase Capacity of
Nonprofit Development
Staff

15-month program

Cohort Learning including four
learning sessions as well self-
study

Participants completing the
program receive a Certificate in
Fundraising Management from
the Indiana University Lilly
School of Philanthropy

Graduates are also allowed to sit
for Certified Fundraising
Executive (CFRE) exam

Cohort 1 & 2

Launched in March 2020 with
in-person classes in Mitchell

Shifted to on-line classes for
August and February sessions

Second cohort began last week

Third cohort applications
open June 2021 with a
November 2021 start date



Jeff Veltkamp, MBA, CFRE
Director of Development
Sioux Falls



Beth Massa, CFRE
Director of Foundation Relations
Rapid City



Jamie Farnen
Community Development
Coordinator & Marketing
Manager
Pierre



Patrick Gallagher,
Community Development
Coordinator
Aberdeen

Development Team

Fund Development

Raising Money in a Pandemic

Engaging partners in the
Coronavirus Response efforts

to donors working on estate
plans

Promote provisions of the
CARES Act that incentivize
giving in 2020 & into 2021

Modify donor engagement
efforts– calls, emails, cards, etc.

New website on the way

Development Snapshot

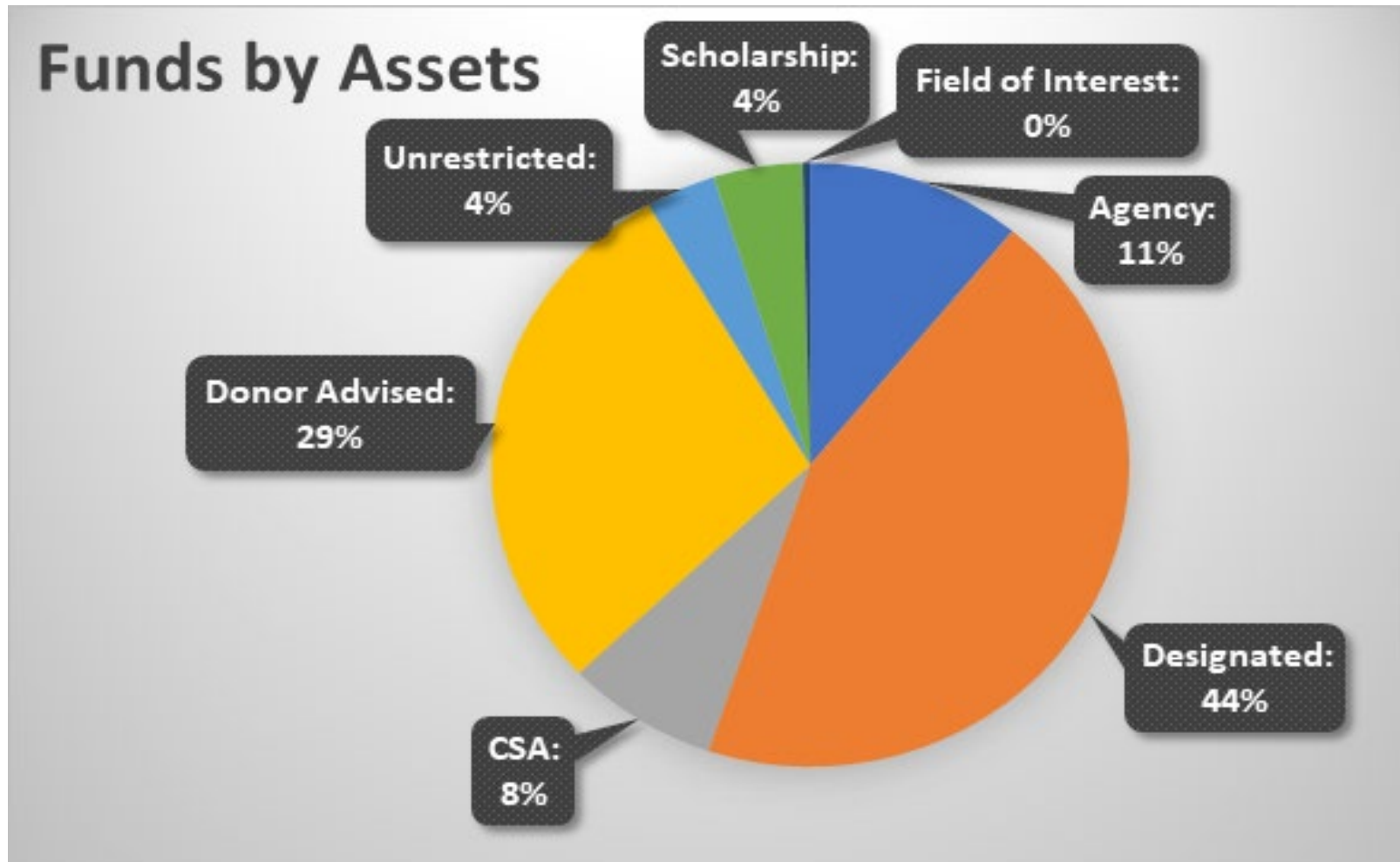
77 New Funds

4,500 individual gifts

Completed a variety of
complex gifts totaling nearly
\$200 million

Funds awarded over \$18
million

Fund Development



Legacy Society

30 New Hometown Heroes

- Those who have made a significant gift to benefit their community



5 Christen-Larson Heritage Circle Members

- Those who have made a significant planned gift during their lifetime or in their estate

75 Key Club Members

- Professional advisors who have referred a client(s) to the South Dakota Community Foundation



LEGACY *LG* SOCIETY



Clay Cudmore, CPA, CMA
Chief Financial &
Administrative Officer



Kelly Nelson
Program Accountant



Karly Winter, JD
Compliance Manager

Finance/ Operations Team

Financials

Investments

Relationship with SDIC

Began 2020 at our minimum equity threshold of 50%

Market decline on March 12th triggered an increase in our equity allocation to 77%

Steep market increases called for a reduction to 60% equities in late April

Followed by a return to our 50% minimum in early June

2020 Performance:

1 Year: : 15.6% return

Benchmark: 13.8%

5 Year: 9.71%

Benchmark: 8.25%

10 Year: 7.51%

Benchmark: 6.47%

Building for the Future

New Address:
2310 Patron Parkway
Pierre, SD 57501





Peggy Urquhart
Administrative Assistant



Shelly Jund
Executive Assistant to the
President

Administrative Team



Wrap up & Questions