



Quick Facts 2009

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| Organization Type: | 501(c)(3) Public Charity |
| Subsidiary Organization: | Achievements Unlimited Foundation – 509(a)(3) Supporting Organization of Impact Foundation (2005) |
| Location: | 4152 30 th Avenue South, Suite 102 • Fargo, ND 58104-8403 Phone: (701) 271-0263 • Fax: (701) 271-0408 • www.impactgiveback.org |
| Year Founded: | 2004 |
| Mission: | To build the capacity of nonprofits, businesses and individuals to maximize their community impact. |
| Major Funding Partners: | <ul style="list-style-type: none"> ▪ Dakota Medical Foundation ▪ Alex Stern Family Foundation ▪ Dakota Certified Development Corporation ▪ Bush Foundation ▪ Otto Bremer Foundation |
| Guiding Foundation Principles: | <ul style="list-style-type: none"> ▪ Entrepreneurial Leadership and Innovation ▪ Strategic Investments in Superior-Performing Nonprofits ▪ Emphasis on Strategic Planning and Goal Setting for Measurable Impact ▪ Long-Term Partnerships ▪ Nonprofit Organizational and Financial Capacity Building and Benchmarking ▪ Leveraging Resources ▪ Maintaining a Low Overhead ▪ Maximizing the effective use of technology |
| Board of Directors: | Dan Carey, Chair John Bertel, Vice Chair J. Patrick Traynor, Secretary/Treasurer and Executive Director |
| Staff: | Nathan Berseth, Director, Procurement Assistance Center Anne Buchanan, Administrative Assistant Julie Haugen, Director, Impact Institute and Grantwriter Laura Hicks, Marketing Coordinator Jim Manly, Director of Volunteer Initiatives Darin Perius, Deputy Director, Procurement Assistance Center Administration provided through a Contract for Services with Dakota Medical Foundation to maximize effectiveness and efficiency. J. Patrick Traynor, President David Gibb, Director of Finance Jennifer Thompson, Director of Development, Grantwriter Deb Watne, Grants and Programs Manager Jeana Peinovich, Program Director, DMF Lend A Hand Initiative Monique Andresen, Accountant Cindy Eggl, Executive Assistant Kim Palm, Grants and Programs Assistant |

Donor Services

Impact Donor Services:

- Donor Advised Funds
- Supporting Organizations–formation and management
- Private Foundations–formation and management
- Scholarship Funds
- Charitable Gift Annuities
- Charitable Remainder Trusts
- Charitable Lead Trusts
- Endowments and Spend-Down Funds
- Field of Interest Funds

Strategies for Greater Impact:

- Impact GiveBack Website – www.impactgiveback.org
- Nonprofit Strategic Assessment and Planning
- Nonprofit Customized Fundraising Systems Training
- Nonprofit Volunteerism Program Training
- Donor Strategic Charitable Planning
 - ▶ Tax-Efficient Wealth Transfer Plan
 - ▶ Entrepreneurial Strategies for Societal Impact
- Connecting Donors with Superior-Performing Nonprofits
- Initiative Development and Leadership
- Grantwriting
- Fundraising

Major Initiatives/Programs

Institute for Innovation and Effectiveness:

Nonprofit Capacity Building Initiative – Impact Institute:

- Provides customized training/consulting to help nonprofits produce superior results for the region.
- 113 Nonprofit Organizations served since 2005.

GiveBack Initiative - To inspire greater and more effective charitable giving:

- North Dakota Wealth Transfer Study commissioned by Impact.
 - ▶ From 2009-2055, total generational wealth transfer in ND from 213,400 households: approximately **\$257** billion.
 - **\$130** billion to family
 - **\$49** billion to charity
 - **\$69** billion to estate taxes
 - **\$9** billion to estate fees (debt, burial costs, legal probate fees)
 - ▶ Total charitable giving 2009-2055: **\$84** billion
 - **\$49** billion by bequest
 - **\$35** by lifetime gifts
- To download a copy of the North Dakota Wealth Transfer Report visit www.impactgiveback.org.
- Training nonprofits to inspire donors to plan their estates with charity included.
- Assisting donors in creating more tax-efficient wealth transfer plans.
- GiveBack website – providing one-stop online resource for donors to review nonprofit snapshots, sign-up for events, volunteer, and donate online.

Economic Development Initiatives – North Dakota:

Procurement Assistance Center (PAC) – Government Contracts:

- Provide North Dakota's small businesses with technical assistance to seek and secure government contracts for goods and services. Special emphasis on Native American and Veteran-owned businesses.
- Over \$100 million in contracts secured by Procurement Center clients since May of 2006.

Low Interest Loan Program:

- Secured \$750,000 from USDA Rural Development and \$187,500 from strategic partner, Dakota Certified Development Corporation, to offer low interest loans for businesses in rural areas of ND.

Dakota Certified Development Fund: To lead and support initiatives which will retain and create high-quality jobs in North Dakota.

Impact-Northwood Recovery Fund: To support initiatives for recovery purposes in the Northwood, ND area in response to the devastating effects of the F-4 tornado that hit the area on August 26, 2007.

Impact-Fill The Dome Fund: To support the Fill The Dome project and local area food shelves.

Power Fund: To support single mothers, their children, and their transportation needs.

Clubs Fore Kids Fund: To supply children with golf clubs, instruction, and access to practice, play, and competition opportunities.

North Dakota Open Foundation Fund: To support charitable initiatives, programs, and projects of the North Dakota Open Foundation with an emphasis on connecting children with the game of golf.

Impact-Cando Connection Fund: To promote charitable initiatives, programs, and projects which support the community of Cando.

Impact-David and Mary E. Gibb Youth Golf Fund: To support area youth golf programs.

Impact-State Bank & Trust Pay It Forward Fund: To promote initiatives, programs, and projects which support the State Bank & Trust Pay It Forward Fund identified areas of need and within their service area.

Impact-Flood Recovery Funds: To help in the recovery and rebuilding efforts for Fargo, Moorhead, and Valley City areas.