

STORY COUNTY PHILANTHROPY DAY 2015



The Story County Alliance for Philanthropy is interested in showing appreciation for all that has been accomplished in the name of giving – and to show that there is still much to do. By celebrating an annual Story County Philanthropy Day, the community will honor individuals, businesses, and organizations that provide essential services to county residents.



STORY COUNTY PHILANTHROPY DAY

THURSDAY, NOVEMBER 12
11:30 A.M. TO 1:15 P.M.

WELCOME

Jean Kresse
*President & CEO,
United Way of Story County*

MUSIC
Cloud Point

PRESENTATION OF AWARDS

Roger Kluesner
Chief Operating Officer, McFarland Clinic, P.C.

Outstanding Individual Volunteer Fundraiser
Monica Porter

Outstanding Business/Corporate/Foundation Philanthropist
Wilson Toyota Scion of Ames

Outstanding Youth Volunteer Fundraiser
Kate Hulshizer

Outstanding Group Volunteer Fundraiser
Altrusa of Ames

Outstanding Individual/Family Philanthropist
Hertz Family

CLOSING REMARKS

Roger Kluesner

OUTSTANDING INDIVIDUAL VOLUNTEER FUNDRAISER AWARD




Monica Porter

*Nominated by
Youth and Shelter Services*

Monica Porter joined the Youth and Shelter Services (YSS) board of directors in 1999 and has served continuously since that time, including three years as Chair. In 2000 Monica was elected to the YSS Board of Trustees and after serving the maximum term, she was elected an Emeritus Trustee by her fellow Trustees to honor her service. Porter always answers “whatever I can do to help,” whenever she is asked to serve.

In addition to her board service, Porter has filled many roles at YSS over the years. This includes:

- Co-chair of the Planned Giving and Deferred Gift Committee for the 1995-96 Preserving the Past – Preparing for the Future campaign to remodel and equip the Ames Municipal Building into the YSS headquarters.
- Co-chair of the 2001-2006 Endow the Future YSS endowment campaign.
- Campaign Cabinet member for the 2006-09 YSS Family Life Center Building and Endowment campaign to remodel the Family Life Center.
- Current Chair of the YSS Dr. George's Founder Legacy Fund fundraising committee.



Porter's strong gift for leadership and the expertise she is able to apply from her professional career as a member of the ISU Foundation Planned Giving team contributed to the success of each one of these YSS campaigns. Monica and her husband Max quickly step up during each campaign and make significant contributions to the fundraising efforts through both planned giving and the annual Friends campaign.

In addition to her service at YSS, Porter serves on the Ames Public Library Friends Foundation Board of Directors and was active in the library's new building campaign. She was on the steering committee of Leave a Legacy Iowa, an effort to encourage Iowans to make planned gifts to non-profits through their estates. Porter has served twice as president of the Ames Noon Rotary Club and president of the Sawyer Parent Teacher Organization. She has served Collegiate Presbyterian church as both a deacon and an elder.

Porter is unassuming and does not actively seek recognition, yet her quiet spirit of commitment, competence and leadership enhances all the organizations with which she is associated. In recognition of her fundraising efforts, she received the Spirit Award from United Way of Story County and the Outstanding Volunteer Service Award given by the State of Iowa.

PREVIOUS AWARD RECIPIENTS

2005: Verne C. Bates
2006: Philip O'Berry
2007: Suzan Shierholz
2008: Linda and Bernie White
2009: Heather and Gary Botine
2010: Neala Benson
2011: Rollie and Willie Struss
2012: Dr. Jay Brown
2013: Jim Black
2014: Roger Kluesner

OUTSTANDING BUSINESS/CORPORATE/FOUNDATION PHILANTHROPIST AWARD




Wilson Toyota Scion of Ames

*Nominated by
LSI (Lutheran Services in Iowa) &
Boys and Girls Club of Story County*

Wilson Toyota Scion of Ames gives back to the community at all levels. They have implemented a philosophy of generosity into their culture, ensuring opportunities for their employees to give back. “We approach our business with a servant’s mentality. Taking care of our community is our number one priority,” shares Danny Wilson, owner.

Two specific programs exemplify this philosophy. Beyond their annual contributions to the Boys & Girls Club of Story County, Wilson Toyota Scion of Ames led the charge in providing financial relief to the Club when it was flooded in 2010. Their leadership in the flood restoration project enabled the Club to quickly resume programming for hundreds of children. The second noteworthy program began four years ago with Wilson Toyota hosting a Christmas party for 40 children who live at LSI’s Beloit Residential Treatment Center.



Wilson employees annually provide a magical Christmas experience for the Beloit children including Santa, elves, and gifts.

In addition to these programs, Wilson Toyota Scion of Ames has donated to a wide variety of Story County organizations and projects, including Ames Christian School, the Ames Education Fund, Ames Parks and Recreation, Boy Scouts of America, Clean Water Movement, Dollars for Scholars, the Octagon Center for the Arts, Friendship Ark Homes, Habitat for Humanity, AHS DECA, Iowa Shrine Bowl, United Way of Story County, Red Cross, Ames Soccer Club, and Lincoln Highway Days.

PREVIOUS AWARD RECIPIENTS

- 2005: Pella Rolscreen Foundation,
Story City Operations
- 2006: McFarland Clinic PC
- 2007: Sauer-Danfoss
- 2008: First National Bank
- 2009: Burke Corporation
- 2010: Greater Iowa Credit Union
- 2011: Alpha Copies & Print Centers
- 2012: Kreg Tool Company
- 2013: 3M
- 2014: Bethesda Lutheran Church

OUTSTANDING YOUTH VOLUNTEER FUNDRAISER AWARD




Kate Hulshizer

Nominated by Volunteer Center of Story County

Kate Hulshizer, a 2015 graduate of Colo-Nesco High School, looks to the memory of her brother as motivation for her work to create a bone marrow initiative aimed at raising awareness about the importance of bone marrow donation. Kate is the type of person that naturally looks for the greater good as she takes initiative to organize change, skills that help her see projects through from start to finish. Kate is a “true future leader for our next generation” according to her high school principal Brandon Kelley.

This commitment to a cause drove Hulshizer to spend her early out time during the week of parent teacher conferences to recruit friends and classmates to help encourage parents, faculty and students to join the network during bone marrow sign-up week, an effort that resulted in twenty one additional potential bone marrow donors.



Hulshizer's desire and willingness to provide a helping hand to a classmate in need led to another project that got her entire school involved with helping ease the financial burden of medical expenses. With the help of staff from the bone marrow donor network, Kate organized a dodge ball tournament fundraiser in which all funds were generated by students through registration fees, ticket sales, concessions and a donation box. Hulshizer saw this project through from start to finish and showed, yet again, her willingness to give her time, talent, and energy in her commitment to helping others.

PREVIOUS AWARD RECIPIENTS

2005: Kevin Geiken and Keegan Kautzky

2006: Nevada Multiage Program

2007: Cory M. Hanson

2008: Joe Wallace

2009: Central Elementary K-Kids

2010: Story County Youth Philanthropists

2011: Ames Public Library Teen Advisory Group

2012: Nevada High School Key Club

2013: Girl Scout Troops 28 and 150

2014: Mrs. Lynn Nielsen's Special Needs Class at Roland-Story Elementary School

OUTSTANDING GROUP VOLUNTEER FUNDRAISER AWARD




Altrusa of Ames

*Nominated by
Youth and Shelter Services*

Altrusa International of Ames, Inc. is a service club committed to improving our community through a variety of events, volunteer opportunities and fundraising for Ames non-profits for 50 years. There are currently 35 members committed to philanthropy, the philosophy of unselfishness and the joy of giving rather than receiving. Altrusa holds two main fundraising events each year. The Holiday Home Tour, celebrating its 27th anniversary this year, will raise funds for United Way's Backpack Program, Ames Historical Society and Heartland Senior Services. The Steppin' Out Style Show raises funds for service awards for high school seniors, as well as scholarships for study abroad, college and trade school students.

Ames Altrusans donate their time, talents and funds to a variety of things. For over 5 years they have painted and redecorated rooms for ACCESS as

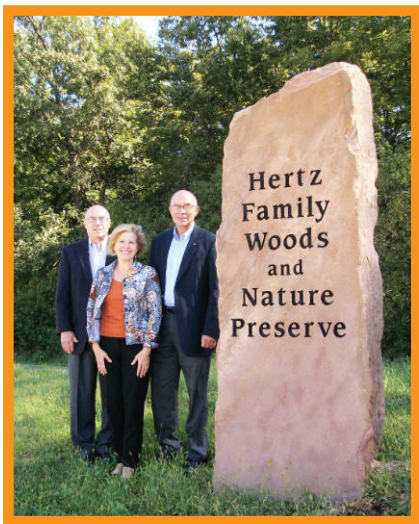


needed. Some members are trained for Emergency Preparedness and can be counted on to respond in a local crisis. Members have been active in the project Totes for Teens, Tweens, and Tots, in which totes are filled with donated items and given to the Youth and Shelter Services Foster Care program or Lutheran Services in Iowa for their client needs. Other activities include sewing headscarves for the Bliss Cancer Resource Center, a Trick-or-Treat for books event at the library, serving a meal for the performers after the Ames Senior Variety Show, adopting a flower garden on Duff Ave, volunteering for Mainstream Living's Be-Amazing Race and more.

PREVIOUS AWARD RECIPIENTS

- 2009: Heartland Senior Services Variety Show Committee
- 2010: Mary Greeley Medical Center Auxiliary
- 2011: Josephine Tope Community Auditorium Capital Campaign Committee
- 2012: Ames Public Library Friends Foundation – Sales Committee
- 2013: Kiwanis of Story County
- 2014: Ames Police Benevolent Association

OUTSTANDING INDIVIDUAL/FAMILY PHILANTHROPIST AWARD




Hertz Family

**Randy and Liz Hertz (Nevada) and
Tom and Joyce (deceased) Hertz (Ames)**

Nominated by Story County Community Foundation

The Hertz family has had a tradition of philanthropic activities in Story County over many years. They have an unwavering commitment to family, land and community. Numerous local community organizations have benefitted from philanthropy and leadership roles. A major recent family project benefitting residents in Story County originated from a bequest of 21 acres of woodland purchased in 1951 by Carl and Marjory Hertz. This land gift to the Iowa Natural Heritage Foundation (INHF) placed deed restrictions on the land that will permanently protect its natural beauty. The Hertz Family Woods and Nature Preserve were donated by the Hertz family in memory of Carl and Marjory Hertz and their son, C. Douglas Hertz with the intention of providing a site for public enjoyment. The family developed the area for several years, eliminating invasive species, restoring an area of native prairie grasses and wildflowers and developing erosion control structures.



The donation stands out from other land donations in that the Hertz family made significant investments to develop limited amenities, including a one-mile trail around the woodland and a parking lot. They provided rock benches and interpretive signage. Most landowners protect or transfer their land for conservation, yet few landowners go to so much effort to create a public space that is ready to share.

The Hertz families continue with philanthropic endeavors most often quietly and without fanfare. Both of the Hertz families have set up donor-advised funds under the umbrella of the Story County Community Foundation. These endowed funds will provide permanent sources of charitable support for the local area now and after their own lives. Jean Kresse from the United Way of Story County shared that “the Hertz Family believes in giving back to their community and they do it in a way that makes a lasting impact.”

PREVIOUS AWARD RECIPIENTS

- 2005: Janet S. and Donald R. Payer
- 2006: Marge and Erb Hunziker
- 2007: Ruth and Clayton Swenson
- 2008: Sherry and Lee Sargent
- 2009: Clare and Jim Frevert
- 2010: Janice and Marvin Walter
- 2011: Carolyn and Chuck Jons
- 2012: Jennifer and Brian Dieter
- 2013: Yvonne and Kevin Kinzler
- 2014: Julie and Harold Pike

AWARDS PRESENTER | ROGER KLUESNER



*Chief Operating Officer,
McFarland Clinic, P.C.*

Roger Kuesner has served the Ames community for over 27 years as an administrator and chief operating officer of McFarland Clinic.

For Kluesner, philanthropy is a family tradition. Since his childhood days of

distributing food to others in the community, he has maintained the philosophy that everyone has something to give, and giving comes in many different ways. His organizational and strategic planning skills,

as well as his personal financial resources, continue to help Story County and other communities thrive.

Roger's time and treasures have benefited the Ames Public Library through his service on the library's Friends Foundation Board; United Way of Story County where he serves as a member of the board of directors; local food pantries in Ames and surrounding communities; and the Iowa Prescription Drug Corporation, an organization that distributes millions of dollars of free prescription medications to Iowans. In recognition of his great service to Story County, Kluesner received the 2014 Story County Alliance for Philanthropy's Outstanding Individual Volunteer Fundraiser award.

Kluesner and his wife Mary Jo live in Ames and have two children, Nick and Mary Beth.

ARTIST | JIM GUNNING

Jim Gunning recently retired from the Health & Safety Department at Iowa State University where he worked for over 30 years. Gunning has been woodworking for nearly 40 years and worked for a short period of time as a finish carpenter. In addition to woodworking he is active in the Ames Lions Club, Ames Coin Club, Ames Woodworkers Club and Ames Area Wood Turners. Over the years he has built clocks, a buffet, tables, cabinets and full size weaving looms. Some 10 years ago his wife Desiree bought him a mid-sized wood lathe that opened up an entire new woodworking world to Gunning. He enjoys the outlet that wood turning provides and loves the possibility of creating something pleasing from amorphous chunks of wood. Gunning especially likes creating works from small pieces of wood that often are discarded as scrap. About his work, Gunning says, “I find segmented

turning satisfying on several levels, shape, aspect, color and segment dimension. I often create a piece around a specific bit of wood or board I have that I want to highlight.” Gunning especially enjoys giving and providing his work to people as unique gifts for weddings and special occasions.



STORY COUNTY ALLIANCE FOR PHILANTHROPY MEMBERS

ACCESS

Cherie Torresi

AMES PUBLIC LIBRARY FRIENDS FOUNDATION

Amy Juhnke

THE ARC OF STORY COUNTY

Tricia Crain

BOYS & GIRLS CLUB OF STORY COUNTY

Erika Peterson

CHILDSERVE

Rachelle Flory

FRIENDSHIP ARK HOMES

Jennifer Ellis

HEARTLAND SENIOR SERVICES

IOWA STATE MEMORIAL UNION

Kevin Merrill

IOWA STATE UNIVERSITY FOUNDATION

Melissa Rowan, Dave Thalacker

LSI (LUTHERAN SERVICES IN IOWA)

Jason Lee

MARY GREELEY MEDICAL CENTER FOUNDATION

Melissa McGarry

STORY COUNTY COMMUNITY FOUNDATION

Judy Jones

UNITED WAY OF STORY COUNTY

Jean Kresse, Kim Mack

VOLUNTEER CENTER OF STORY COUNTY

Anne Owens

YOUTH AND SHELTER SERVICES

Brian Wilson



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PHYLLIS AND LARRY LEPKE

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STIFEL-NICOLAUS (DANIEL P. DIVINE)

Daniel P. Divine, Senior Vice President/Investments, is with Stifel, Nicolaus & Company, Incorporated, a full-service financial services firm established in 1890, which

provides securities brokerage, investment banking, trading, investment advisory, and related financial services to individual investors, institutions, corporations, and municipalities. www.stifel.com

STORY COUNTY COMMUNITY FOUNDATION

Providing the means by which Story County residents can give where they live to build a brighter future for all. www.storycountyfoundation.org

UNITED WAY OF STORY COUNTY

A strategic leader in building countywide partnerships to identify needs and to develop, support and evaluate effective human services for our diverse community. www.uwstory.org


ADDITIONAL SUPPORT

Cyclone Awards and Engraving
Country Plastics
Gateway Hotel and Conference Center
Nelson Electric



THANK YOU

to all who played a role in the Story County
Philanthropy Day Celebration. We are
grateful to live in communities with people
who care and give so freely of themselves to
improve the lives of others.



Story County Alliance for Philanthropy

c/o United Way of Story County

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storycountyphilanthropy.org

