

# **CONTENTS**

- 1. Board Member FAQ
- 2. Staff + Board Contact Information
  - 3. The Iowa Center White Paper
    - 4. Fundraising Brochure
      - 5. Strategic Plan
        - 6. Financials



# BOARD MEMBERS: WHAT YOU SHOULD KNOW

#### TIME COMMITMENT:

- The board of directors meets every other month (currently 7:30 -8:30am the 3<sup>rd</sup> Thursday of every other month: August, October, December, February, April, June).
- The Executive Committee meets the opposite months on the third Thursday.
- Attend events hosted by The Iowa Center (unless hosted virtually due to social distancing). The targeted goal for event attendance is six a year—or one bi-monthly event. The first Friday of every month we host a special session called The Story Of...and Small Business Essentials (normally hosted on Tuesdays at noon) are a great place to start.
- Setting up networking meetings for Megan Milligan.

#### **BOARD MEMBER EXPECTATIONS:**

- Attendance at the six board meetings is expected although we recognize that travel and other
  commitments means this is not always possible. There is not a mandated attendance policy. If a
  board member is out of town, call-in conferencing is an option. We try to avoid that for in-town
  members as on-site presence and participation is beneficial. (We are currently holding all of our
  meetings virtually due to the COVID pandemic. Links to the Zoom meetings are sent out in
  advance.)
- The lowa Center holds public events monthly (an activity we have increased for FY 2021). Board Members are not required to attend; however their presence is beneficial to the other guests.
- While The Iowa Center does not have a minimum request, we do have a goal of 100% board giving and getting. We hope each board member will make a financial gift to The Iowa Center and help solicit, make introductions, advise on opportunities for fundraising. Likewise, board members are not expected to volunteer, however there are opportunities for them to lend their expertise if this is in an area of interest.

#### PRIORITIES FOR THE IOWA CENTER FY21:

- Growing our Direct Services including education, microloans and coaching
- Continuing to improve our triage program
- Upgrading and updating our IT and Technology
- Marketing
- Fundraising; including assessing current state and federal relationships
- Strengthening existing services
- State-wide growth opportunities



#### **CURRENT BOARD MEMBER STRUCTURE:**

Our board currently has 17 members as the max was mandated by our former Articles of Incorporation. At the end of CY16, the board voted to change that number to 25.

The board consists of members-at-large and an executive committee which includes Chair, Vice Chair, Secretary, Treasurer, President and Immediate Past Chair. All but President is a one-year term.

#### Additional Information:

As mentioned above, board members have the flexibility to make The Iowa Center their passion and main way to volunteer or can add us to a long list of ways they contribute to our community; we provide many opportunities to serve and volunteer. We are in a position to significantly increase our imprint in the community; most of the issues we address through our services are "hot button" issues right now. We look to the board to serve as advocates – spreading our story far and wide so that we may attract more clients and donors.

If you have addition questions, feel free to reach out to any member of our Executive Committee:

Megan Milligan, President, ex officio 515-283-0940 work mmilligan@theiowacenter.org

Bill Wright, Chair 515-210-3050 cell bill.wright@cbre-hubbell.com

Franklin Codel, Vice Chair 515-979-0319 cell frcodel@mchsi.com Mari Bunney, Treasurer 515-321-4665 cell Mari.bunney@rbc.com

Mark Phillips, Secretary 515-225-0710 mkphillips@bankiowa.bank

Kevin Chorniak, Immediate Past Chair 812-455-7645 cell KChorniak@bankerstrust.com



# STAFF

Megan Milligan
President + CEO

**Lisa Acheson**Constituent Manager

Russ Dale
Technology + Innovation Coordinator

Suzie Dunya
Advancement Coordinator

TJ Daniels Lending Coordinator

> Katie Hentges Chief of Staff

**Shane Isley**Director of Finance and Administration

**Ciara Ladroma**Project Manager, Women's Business Center

**Erma Mujić**Manager of Government Funding + Compliance

**Zach Ohlson**Project Manager of New Initiatives

**Linda Salazar** Administrative Assistant

**Ben Schultz**Client Services Coordinator



#### **BOARD OF DIRECTORS**

# Megan Milligan, President, ex officio

President + CEO

Iowa Center for Economic Success
8345 University Blvd, Suite F
Clive, IA 50325
515-283-0940 work
mmilligan@theiowacenter.org

### Bill Wright, Chair

Senior Vice President, Managing Director
CBRE, Hubbell Commercial
6900 Westown Parkway
West Des Moines, IA 50266
515-221-6672 office
515-210-3050 cell
bill.wright@cbre-hubbell.com

#### Franklin Codel, Vice Chair

Community Volunteer 5453 Westwood Dr West Des Moines, IA 50266 515-979-0319 cell frcodel@mchsi.com

# Mari Bunney, Treasurer

Financial Advisor, RBC Wealth Advisors 1250 NW 128<sup>th</sup> Street, Ste 200 Clive, IA 50325 515-225-4517 mari.bunney@rbc.com

# Mark Phillips, Secretary

VP, Treasury Management
Bank Iowa
1150 Jordan Creek Parkway
West Des Moines, IA 50266
515-225-0710
mkphillips@bankiowa.bank

#### Kevin Chorniak, Immediate Past Chair

Chief Operating Officer,
BTC Capital Management
Senior Managing Director - Institutional and
Wealth Management Services
Bankers Trust Company
3660 Grand Avenue, Unit 630
Des Moines, IA 50312
812-455-7645 cell
KChorniak@bankerstrust.com

#### **Dave Everett**

Senior USIM Manager, Dupont Pioneer - Retired 3825 John Lynde Road Des Moines, IA 50312 515-583-8165 cell dave.everett@mchsi.com

#### Nichole Hansen

Community Investments Team Leader, lowa Economic Development Authority 1422 Alderwood Road Altoona, IA 50009 515-782-8931 cell 515-725-3081 work Nichole.Hansen@IowaEDA.com

#### Micah Kiel

VP, Community Affairs Consultant
Wells Fargo Corporate Philanthropy and
Community Relations
800 Walnut St. 8th Floor,
Des Moines IA 50309
515-557-5168 work
515-864-6277 cell
micah.kiel@wellsfargo.com



#### **Monica Muhammed**

Director of Property Management,
Anawim Housing
1171 7<sup>th</sup> Street, #1
Des Moines, IA 50314
515-288-0739 cell
515-331-1702 work
mmuhammad@anawimhousing.org

#### **Brandon Pratt**

Tax Officer, Bankers Trust 3660 Grand Avenue, Unit 630 Des Moines, IA 50312 515-248-1372 work Bpratt@bankerstrust.com

#### **Jodi Rhone**

Founder, Canary Consulting Group, LLC jodi@canaryconsultinggroup.com
515-778-3513 cell

#### **Ann Rolow**

WW V.P. Sales Strategy and Training Kemin Industries 1900 Scott Ave Des Moines, IA 50317 515-229-9392 Ann.Rolow@kemin.com

#### **Todd Sommerfeld**

Chairman + CEO
Kreg Tool
201 Campus Drive
Huxley, IA 50124
515-597-6400 work
todd.sommerfeld@kregtool.com

#### **Courtney Strutt Todd**

Partner, Davis Brown Law Firm
2105 NW Sunset Lane
Grimes, IA 50111
515-402-3945 cell
515-246-7842 work
CourtneyStruttTodd@davisbrownlaw.com

### **China Wong**

Owner, Salon Spa W 400 E Locust Ste 2 Des Moines, IA 50309 515-557-0642 cell ChinaW@mac.com



# Mission

Our mission is to empower lowans with the potential to succeed as they pursue opportunities for financial success.

# **Our Why**

The Iowa Center is committed to empowering people to strengthen and stabilize their financial futures through business ownership and investment. It is our belief that to be successful in small business, one needs support in three core areas: education, capital, and networking. We have built key programs that support those core areas and empower individuals to succeed, families to prosper, and communities to thrive. Success to us is people supporting themselves and their families through the execution of their own ideas.

# **Priorities**

#### **EDUCATION**

 We offer individuals access to our variety of classes, one on one coaching, and mentoring opportunities. We empower clients to develop the skills, confidence and resources necessary to start, grow, and succeed in business. Our clients are tremendously smart and driven; they come to us with good ideas and the perseverance to turn those ideas into reality.

# **CAPITAL**

 Ability to obtain capital is one of the most significant obstacles to the growth of business. This is especially true for Iowa's female, minority, veteran, and disabled entrepreneurs. For businesses with few assets and limited capital needs, a microloan is often the best option. Through our microloan program, we offer loans up to \$50,000 with highly competitive fixed interest rates.

# **NETWORKING**

• We organize networking opportunities for our clients with other lowa professionals and link them to niche small business specialists. We host speed networking events, peer mentoring groups, lunch and learns and motivational speakers, all with the goal in mind of building our clients' networks and raising the visibility of small businesses.