



Larned A. Waterman Iowa Nonprofit Resource Center 2000-2009



Larned A. Waterman
Iowa Nonprofit Resource Center
130 Grand Avenue Court
Iowa City, IA

Cover photos, clockwise from upper left: Waterloo-Cedar Falls
Symphony, photo by Noah Henscheid, fotostem.com;
Landlocked Film Festival, Iowa City, photo by Mary Blackwood;
Friends of the Animal Center Foundation, Iowa City, photo by Liz Ford;
Table to Table, Iowa City, photo by David Wellendorf.

From INRC's Director

Dear Friends,

The Larned A. Waterman Iowa Nonprofit Resource Center (INRC) began in 2000 with a survey of 119 Iowa nonprofits. The goal was to get a strong sense of nonprofits' needs. Board governance, information technology, fundraising and volunteer retention were among the issues clearly identified. Since our beginnings, we have established a long record of training students in nonprofit law and legal issues, providing important information on nonprofit issues on our Web site, and being attuned to the needs of Iowa's nonprofit community. Our numerous publications provide Iowa nonprofits with helpful guidelines. We speak regularly with various governmental entities about their interactions with nonprofits. As of 2009, 1700 Iowa nonprofits have been trained in the *Iowa Principles and Practices for Charitable Nonprofit Excellence*, which were created in 2005 as part of the Governor's Nonprofit Task Force.

Iowa's nonprofit world is ever growing and ever changing. In 2001, there were 10,815 nonprofits with 501(c)(3) status. In 2008, there were 14,818. Since the INRC began, a new and significantly different version of the Nonprofit Corporation Act was passed in Iowa, and the IRS radically revised the Form 990. We have helped many nonprofits adapt to these changes. The need for the INRC remains strong, and we strive to meet that need.

Iowa's nonprofits help make Iowa a great state. I invite all charitable nonprofits to use our Web site, to take our courses and workshops, and to participate in the statewide nonprofit conferences. Staff from various nonprofit organizations meet each other at these events and develop valuable connections within the nonprofit community. Learning from each other and improving skills increases the efficiency of our nonprofit organizations. Engaging in dialogue with nonprofit staff enrolled in our off-campus courses helps us better understand the issues the nonprofit community faces, and the questions nonprofits direct to us at the INRC highlight emerging issues.

We at the Larned A. Waterman Iowa Nonprofit Resource Center have learned much from nonprofit organizations over the last ten years. I encourage all of you to be part of our effort in the next ten years to make Iowa's nonprofit community a strong cornerstone of life in our state.

Richard Koontz
Director
Larned A. Waterman Iowa Nonprofit Resource Center



From Iowa's Governor

Dear Friends,

In this ten-year anniversary report of the Larned A. Waterman Iowa Nonprofit Resource Center, it is appropriate to begin by commending Dr. Sandy Boyd, Mr. Richard Koontz, and all of the fine staff who have worked so hard to make this resource a reality. It was ten years ago that I met with Dr. Boyd and Mr. Koontz when they were just beginning to create the INRC. I was very impressed with their vision, and I am now even more inspired by their accomplishments and worthy goals. Over the past decade, thousands of nonprofits in the state and, by extension, innumerable citizens have benefitted from various charitable activities of the INRC. It is a testimony to the hard work of Dr. Boyd, Mr. Koontz, and other members at the INRC.

As governor, I also want to commend the thousands of Iowans who serve as nonprofit board members, volunteers, and employees. It is indisputable that these individuals and their nonprofit organizations play a crucial role in assuring a brighter future for our communities and, ultimately, better opportunities for all Iowans.



I had the opportunity to participate in the Governor's Nonprofit Task Force which introduced the *Iowa Principles and Practices for Charitable Nonprofit Excellence*. Task Force members formulated these principles and practices as a way to promote good management practices, ethical conduct and public accountability, and in doing so, created a valuable tool for organizations and individuals as they go about the work of building better Iowa communities. Over the past decade, the INRC has held seminars and offered courses in which they introduced the *Principles and Practices* to nonprofits throughout the state.

As we all know, Iowa has always been made up of vital communities. Increasingly, the factors that boost community strength come from Iowa's charitable nonprofit organizations. Our charitable nonprofits are synonymous with community. Iowa's citizens, volunteering in the thousands, build our communities. Iowans on their own initiative address local needs, formulate values, and take action through these voluntary associations. Community organizations range across the broad spectrum of daily life including religion, health, social services, education, culture, community development, housing and human rights. Many are small in size and financially fragile. Yet they are crucial factors in making Iowa a great place to work and live. It is only with these important community nonprofit associations that Iowa grows not only economically and socially but spiritually as well.

In 1982, we established the Governor's Volunteer Award program to honor and recognize the commitment, service and time that hundreds of volunteers contribute each year. Historically, only state government agencies and their affiliates were eligible to nominate their volunteers. In 2004, the program was expanded to allow nonprofit organizations to participate. As governor, I believe the people of Iowa should recognize and support the contribution of the charitable nonprofits to their community through volunteer effort and donations.

Finally, I would like to commend the INRC for its accomplishments over the past ten years and sincerely wish it all the best as it continues with its extraordinary mission in the state for many more years to come.

Sincerely yours,
Chet Culver, Governor
The State of Iowa

About the Larned A. Waterman Iowa Nonprofit Resource Center

The Larned A. Waterman Iowa Nonprofit Resource Center (INRC) was created at the University of Iowa in 2000 to reach out to nonprofit organizations across the state.

The INRC is a University of Iowa interdisciplinary collaboration that strives to increase accessibility to more educational and service programs focused on strengthening the operational capacity of nonprofit organizations.

Based in the College of Law, the INRC works collaboratively with government agencies, nonprofit organizations, and educational institutions and has received crucial private gift support since its beginnings. Mary Hubbell Waterman of Davenport gave \$2.5 million in 2004 to name the INRC in memory of her husband, Larned A. Waterman, 47JD, a Quad Cities community leader who died in 1983. Her gift provides an ongoing, stable base for the INRC. Other critical support has been provided by the Mansfield Charitable Foundation of Belle Plaine and the Qwest Foundation of Denver.

The INRC creates new knowledge through activities and provides information and training resources to help nonprofit organizations and interested persons throughout Iowa. It seeks to build the capacity and develop the overall effectiveness of community-based organizations. Through the INRC, students are introduced to the nonprofit sector and develop a sense of public and community service.

Currently, there are more than 28,000 nonprofits in Iowa, an average of almost 300 per county. Chances are good that Iowans' lives are touched by at least one nonprofit on a regular basis. However, starting a nonprofit is a lot more complicated than having civic spirit, compassion, and an innovative idea. There are lengthy tax forms to fill out, governance and staffing structures to set up, volunteers to coordinate, and fundraising basics to learn. To support these activities, the INRC has offered numerous courses both on and off campus.



The INRC has done a great job of providing information and guidance to Iowa's nonprofit organizations. At their statewide Principles and Practices workshops, they present tremendous information that helps organizations not only raise money but also help these groups understand how to be accountable for the funds they raise. I think it is so important today to make sure that the money goes to responsible agencies. This type of education is just what the INRC does so well. We want to continue to work with the INRC because we feel that the information they make available through their workshops and via their Web site is very valuable to the state of Iowa. We hope this relationship continues for many years to come.

*Michael Mauro
Iowa Secretary of State*

On-Campus Courses

Nonprofit Organizational Effectiveness (NOE) Courses I and II

These two semester-length courses cover the operational and financial aspects of nonprofit management; the mission and governance of organization; and strategic planning for effective management, including finance, budget, income generation and fundraising. The courses are based in the department of Management and Organizations in the Henry B. Tippie College of Business and are taught jointly by professors Andrew J. Hosmanek, Willard L. Boyd, Richard F. Koontz, and Jude P. West.

In the ten years that the NOE courses have been offered, 1400 students have learned how to manage nonprofits, what the expectations are when serving as a nonprofit board member, and how to raise funds. Since 2005, the NOE courses have also been available online through the Division of Continuing Education.

Nonprofit & Philanthropic Organizations

This seminar, taught jointly by Richard Koontz and Willard Boyd, focuses on selected issues in law and policy relating to philanthropic and nonprofit institutions. Areas of focus may include the creation of nonprofit entities; the role, nature and history of such institutions; tax exemption and tax treatment (including property tax and donor tax treatment issues); the political and legislative activities of nonprofits; the roles of members, directors and officers; problems of external regulation, accreditation and ethics; special issues relating to religious organizations, community foundations, private foundations, or universities; and development of philanthropic and nonprofit activity in selected foreign jurisdictions.

Students gain practical experience by completing the forms necessary to create a tax-exempt nonprofit. They also write a memo to a hypothetical client explaining a broad set of legal issues pertaining to nonprofits.



When I was at the law school, I took the seminar for law students and I very much enjoyed it. It gave me a tremendous basis in nonprofit law and the governance law that surrounds nonprofits. For two years, I was a research assistant for the Iowa Nonprofit Resource Center. The INRC gave me a tremendous base of knowledge that I could apply for the rest of my career about nonprofit law and nonprofit management. Things that I have learned from Professor Boyd and Professor Koontz come up every single day in my job. The other thing is that when I have a very tricky question or a very sophisticated question, the research techniques and resources that the INRC make available have been very useful to me.

*Joseph Clamon
Attorney
Iowa Health Systems*

Workshops and Training

Start an Iowa Charitable Nonprofit

A hands-on workshop called Start an Iowa Charitable Nonprofit is frequently offered at locations around Iowa. In this day-long session, information that is integral to starting a nonprofit organization is shared. Participants are guided, line by line, through the twenty-eight-page tax form that enables an organization to be tax exempt.

Principles and Practices for Charitable Nonprofit Excellence

Our workshop entitled Iowa Principles and Practices for Charitable Nonprofit Excellence has become something of a necessity for nonprofits seeking private funding. The day-long session outlines best practices in all aspects of effective nonprofit organization. Some key funders in the state require nonprofits to have taken the workshop before they will consider the organizations for grants and gifts. The workshops grew out of the Governor's Task Force, convened in 2004, by former governor Thomas Vilsack. Willard "Sandy" Boyd chaired the Task Force which developed these essential recommendations for Iowa nonprofits. Supported in part by the Qwest Foundation, the workshop is offered statewide. More than 1700 Iowa nonprofits have completed it.

Continuing Legal Education

Over the last ten years, the INRC offered, in conjunction with the UI College of Law, five continuing legal education sessions that focused on nonprofit law. These sessions kept Iowa's bar aware of nonprofit legal developments by featuring such great speakers as Professor Randall Bezanson on faith-based nonprofits and the first amendment; Bruce Hopkins, the author of numerous hornbooks on nonprofit law; Theresa Pattara, counsel to Senator Grassley whose Senate Finance Committee is a center for evolving federal nonprofit law; and John McCormally the assistant attorney general who is running Iowa's new charities division.

My INRC experience helped me with the career I ended up taking because of the leadership provided by Professor Koontz. Like any RA, I had routine, predetermined tasks.



However, what distinguished my experience at INRC was the recognition of the talent and expertise that each RA brought to the position. For me it was education. Professor Koontz gave me assignments that allowed me to apply my background as an educator to my RA position. This gave me practical opportunities to apply my legal education to my education background. At the time, I had no idea that I would end up at the Iowa Department of Education as an educational consultant.

*Corwyn Moore, Attorney
Iowa Department of Education*

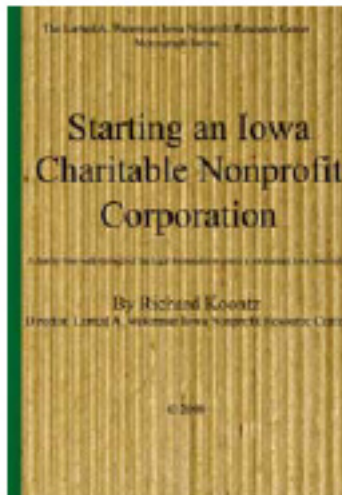


I received a letter from the IRS...indicating that the Backyard Abundance submission for nonprofit status has been accepted. We are now a 501(c)(3) nonprofit. This milestone is a huge step in helping us create resilient local food systems and habitat within our community. Thank you so much for all of your help, advice and time. Without you and your workshop, this process would have been incredibly difficult and error prone.

Fred Meyer, Director

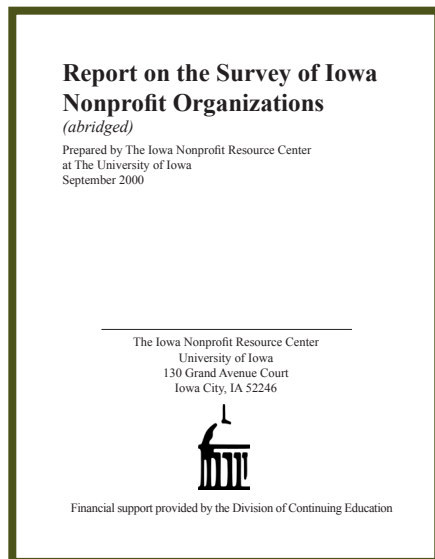
Publications

Monograph: *Starting an Iowa Charitable Nonprofit Corporation*, by Richard Koontz



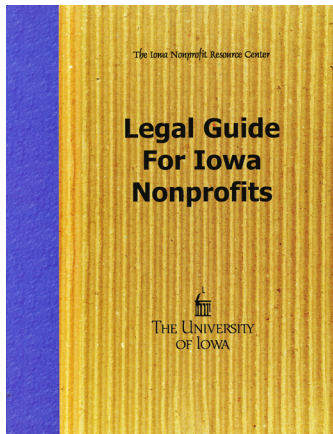
Published in 2008, this monograph is a guide to starting a charitable nonprofit in the state of Iowa. The focus is on the small, startup nonprofit. The monograph provides a line-by-line walk through the legal documents needed to create a nonprofit corporation with 501(c)(3) tax-exempt status. While the monograph attempts to provide guidance for non-lawyers on legal issues, legal sources are noted in footnotes for those who want more detailed legal guidance.

Report on the Survey of Iowa Nonprofit Organizations



Between May and August 2000, students from The University of Iowa College of Law conducted interviews with 138 Iowa nonprofit leaders. The survey, funded by the UI Division of Continuing Education, was undertaken with three objectives. First, the INRC intended to further develop its understanding of the nature of nonprofit organizations in order to ensure that its services were appropriate to organizations' needs. Second, the survey aimed to determine ways of involving Iowa nonprofits in the work at the INRC. Finally, the INRC sought to inform potential clients of its development and role in the Iowa nonprofit community.

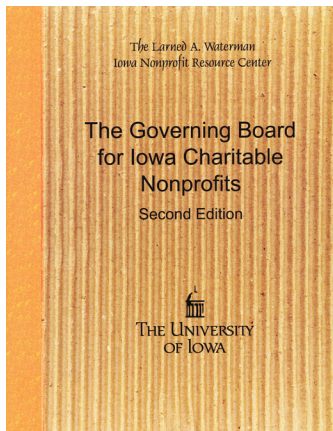
Legal Guide for Iowa Nonprofits, edited by Richard Koontz



This guide is designed to help Iowa nonprofit organizations with basic legal issues. It covers the organizational structure most common to Iowa nonprofits, the nonprofit corporation, and outlines how to define and manage the liabilities facing nonprofit boards. The basic rules under which tax exempt organizations must function under Internal Revenue Code section 501(c)(3) are spelled out. Legalities of obtaining funding and rules governing employees are also covered.

The volume was written by lawyers and is useful to lawyers. However its terminology and subject matter are accessible to any manager of a nonprofit organization.

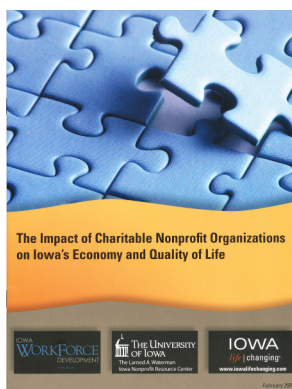
The Governing Board for Iowa Nonprofits, 2nd edition by Willard L. Boyd, *et al*



Updated in 2007, this publication examines some of the questions members of a board of governance consistently ask such as: what is the responsibility of a governing board? What does the board do? What is the role of the board chair? What is the role of the executive director and staff with the board? How is the board accountable?

The second edition includes new or expanded material on topics that include: legal compliance and good management practices, board accountability and compliance, adopting a code of ethics and creating an ethical culture of compliance, evaluation of the executive director, legal compliance checklist for Iowa nonprofits. A list of the best Web sites for Iowa nonprofits is also included.

The Impact of Charitable Nonprofit Organizations on Iowa's Economy and Quality of Life



Developed by the Larned A. Waterman Iowa Nonprofit Resource Center and the Iowa Department of Economic Development, this report draws upon information obtained from Iowa Workforce Development and the Urban Institute's National Center for Charitable Statistics. Key decisionmakers at all levels, potential donors, business leaders, and others will find this material useful as the report provides data on the impact of the nonprofit sector on Iowa's economy and quality of life.

The Role of Charitable Nonprofit Organizations in Iowa

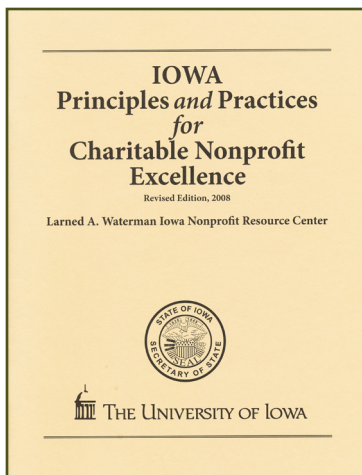


Recognizing the vital role of voluntary charitable community associations, Governor Thomas Vilsack in January 2004, appointed a task force chaired by Willard “Sandy” Boyd, to “assess the present and potential role of Iowa’s nonprofit sector in advancing the vitality of communities throughout the state.”

The governor charged the group with the task of identifying the barriers preventing charitable nonprofit organizations from achieving their full potential. He also asked members to develop a set of recommendations describing how charitable nonprofit organizations can be more effective in their operations and how their services can be enhanced through collaborations with the business community and government entities. Finally, the Task Force was directed to suggest strategies for

increasing citizen involvement in nonprofit activities throughout the state. The report was published in 2005.

The Iowa Principles and Practices for Charitable Nonprofit Excellence, 2nd edition

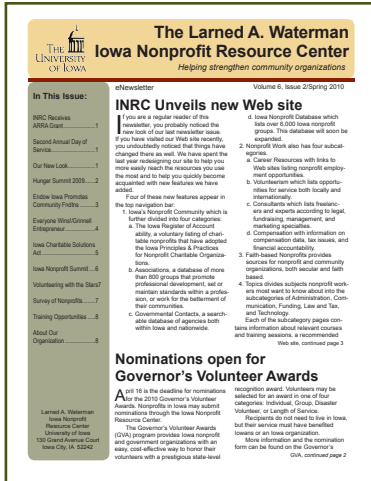


This updated edition clarifies management practices, ethical conduct, and public accountability. Governor Chet Culver said the guidelines “include more Iowa-specific information and will better allow Iowa nonprofit organizations to improve their ability to provide their services.” Secretary of State Michael Mauro said, “Increasingly, the factors that boost community vitality come from Iowa’s charitable nonprofit organizations. I hope this booklet serves as a useful resource for local nonprofits.” The revised *Principles and Practices* are the product of a 2008 effort by the Governor’s Nonprofit Task Force which was chaired by Dr. Willard “Sandy” Boyd and includes the Secretary of State’s office among other partners involved in promoting standards for nonprofit organizations in Iowa.

It (P & P) deals with principles and not just with management. It has helped us tremendously with fundraising and board education, among other things. It was really terrific.

Annie Tucker, Mediation Services

Quarterly Newsletter



The INRC Quarterly newsletter began publication in the fall of 2000 as a one-page document distributed mainly to readers on the UI campus and in the Iowa City-Cedar Rapids area. From the beginning, however, the newsletter documented the expanding activities and projects engaged in by INRC staff. Publications, workshops, credit courses, surveys and other activities developed and carried out by INRC staff were covered.

As the INRC gained momentum, an identifiable look and format for the Quarterly were developed, and the content became broader in its focus. The newsletter staff incorporated some new features such as book reviews, technical advice geared for nonprofits, and occasional articles written by experts from state agencies and areas of the nonprofit sector. The Quarterly is now distributed electronically to about 2,000 readers and is also posted on the INRC Web site.

DVD and Video – *The Essence of Community: Iowa’s Nonprofits*



Iowa has a vibrant nonprofit sector working to build local communities by providing vital services. Too often we do not realize the total impact of the nonprofit sector on Iowa life. Working with The University of Iowa’s Center for Media Production, the INRC created this video to provide examples of the impact of the nonprofit sector in Iowa. Recording took place in Council Bluffs, Red Oak, Cedar Rapids, Decorah, Des Moines and Waterloo. The video is designed to be used as a part of community presentations by nonprofit organizations on the vital role they play in their community’s development. We hope that service groups, chambers of commerce and other civic organizations will find it useful.

Richard Koontz and Kevin Kelly of The University of Iowa produced the video.

Telephone and E-mail Inquiries

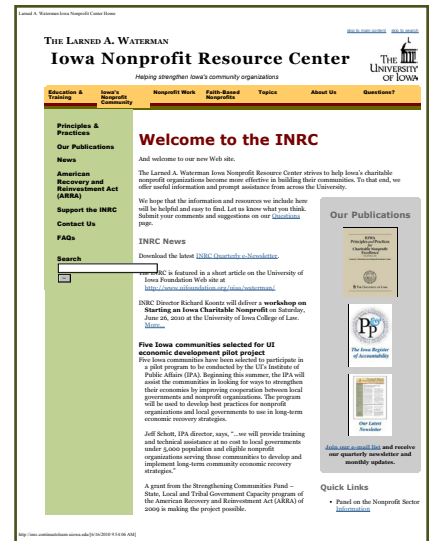
The INRC regularly receives e-mail and telephone inquiries from Iowa nonprofits regarding various issues. In 2007 we responded to 97 inquiries for assistance; in 2008, 216; and in 2009, 276.

INRC Web Site

The INRC Web site at <http://inrc.continuetolearn.uiowa.edu/> is an important resource for nonprofits across Iowa. It is one of the INRC's primary tools for delivering information and services to our constituency. The first INRC Web site was rolled out in 2001. In March 2010, a newly designed site was launched with an updated look, new features, and an improved navigational structure.

We hope that the Web site serves three primary functions. First, by helping visitors find relevant information quickly and easily, we aim to be nonprofits' first stop on the Internet. Second, we hope to facilitate and encourage communication among nonprofit leaders across the state. Finally, by providing links to a variety of useful campus resources, we hope the Web site will help Iowa communities easily connect with The University of Iowa.

In late 2009, the Iowa Grants Guide (IGG) migrated to the INRC Web site. The IGG grew out of an increasing demand for information on organizations that provide financial support to nonprofit groups, educational institutions, and individuals in the state and has evolved into a comprehensive directory for grant seekers.



Some of the benefits of the Web site are:

- The Register of Accountability listing more than 800 nonprofits that have adopted or whose representatives have been trained in *The Iowa Principles and Practices for Charitable Nonprofit Excellence*.
- A Topics section subdivided into areas of greatest interest to nonprofit organizations. Each subsection lists a related Web site, book, or other resource that will be of interest to users.
- A calendar of courses, training sessions, and workshops.
- A guide to recommended books on nonprofit subjects and where to find them.
- A directory of government contacts, legal and management resources, and consultants
- Links to the best nonprofit Web sites.

Visits to the Web site have steadily increased. In 2007, there were 14,474 visits with Iowa users representing 313 towns. In 2008, there were 26,939 from 83 countries. Of these, 18,461 were Iowans from 526 towns. In 2009, there were 26,564 visits.

I believe that [the INRC] is a model for the country. It is thorough, it is complete, it is aggressive, it is innovative. It is a model for America. If every state has an institution like this working with the nonprofit community, our whole country will be better with regards to nonprofits. It is the highest testimony I can give. I have seen their work, I have heard about their meetings and they are an extraordinary organization.

Wayne Ford
Iowa House of Representatives



Government Relations

In 2004, Willard Boyd testified before the Senate Finance Committee's Hearing on Charity Oversight and Reform. He said, "We applaud this hearing because it is an opportunity to emphasize the importance of the nonprofit sector in the life of America. Historically, we have relied upon the local private nonprofit sector to meet many community needs. We must continue to strengthen that tradition."

Throughout its ten-year history, the Iowa Nonprofit Resource Center has continued to keep state government informed of the issues facing Iowa nonprofits.

Governor's Nonprofit Task Force

One of the central governmental responses to nonprofits in Iowa was the Governor's Nonprofit Task Force. In January 2004, recognizing the vital role of voluntary charitable community associations, Governor Thomas Vilsack appointed the Nonprofit Task Force "to assess the present and potential role of Iowa's nonprofit sector in advancing the vitality of communities throughout the state."

The governor also charged the group to make recommendations as to how nonprofit organizations can operate more effectively and to explore how they might extend their services and encourage citizen involvement through collaboration and partnership with business and government. Governor Vilsack said, "[citizen involvement] is the essential ingredient of successful community associations."

The goals of the Task Force were to:

1. Identify and evaluate the Iowa nonprofit sector.
2. Increase active involvement of the nonprofit sector in Iowa and local communities.
3. Strengthen nonprofit sector capacity through peer collaboration.
4. Partner with business and government in community building.
5. Increase organizational effectiveness.
6. Build citizen support of nonprofit organizations.
7. Set standards of greater nonprofit accountability.
8. Enhance public awareness of the Iowa nonprofit sector.

Twenty-three individuals, including four legislators and representatives of the offices of the Governor, Secretary of State, and Attorney General, comprised the Task Force. Information and data were gathered through four day-long sessions, regional meetings, and other sessions individual members held in their communities.

To read the findings, download *The Role of Charitable Nonprofit Organizations in Iowa-Report of the Governor's Task Force 2005* at <http://inrc.continuetolearn.uiowa.edu/updates/GovTaskForce/Report.pdf>



Iowa has a vibrant nonprofit sector working to build local communities by providing vital services. Too often we do not realize the total impact of the nonprofit sector on Iowa life.

*Willard "Sandy" Boyd
Founding Director
Larned A. Waterman
Iowa Nonprofit Resource Center*

Iowa Agencies on Aging Contract

Iowa has thirteen Area Agencies on Aging (AAA) created by the federal Older Americans Act and administered on the state level by the Iowa Department on Aging. Under an Iowa law passed in 2007, AAA board members must complete four hours of training provided by the Department of Aging each year. For several years, under a contract with the Iowa Department on Aging, the INRC provided this training, the purposes of which were to:

- Educate members of AAA boards in areas such as expectations of board members, responsibilities, functions, and liabilities.
- Help AAA board members be better informed and more effective in their roles.
- Educate AAA board members on issues of accountability.

Iowa General Assembly Government Oversight Committee

In 2007, the INRC presented the Iowa General Assembly Government Oversight Committee with a letter outlining the issues facing nonprofits in Iowa. The issues included executive and board compensation, conflicts of interest, financial audits, internal financial controls, legal compliance, board competency and training, and public disclosure.

Statewide Conferences

The INRC has participated in two statewide nonprofit conferences and is involved in planning the third conference for fall 2010.

The first Iowa Conference on Volunteer Service and Nonprofit Management was held in October 2008 in Ames, Iowa. The theme was “Together: Building Iowa’s Future.” Experts in a variety of areas such as training, strategic planning, tax issues, volunteer management, fundraising and board development presented a variety of workshops during the two-day conference. This initial conference was planned by the INRC and the Iowa Commission on Volunteer Service.



The second conference, held in Des Moines in November 2009, evolved as the Iowa Nonprofit Summit. The theme was Turning Challenge into Opportunity. Workshop topics included media relations for nonprofits, legislative advocacy, a health insurance update for nonprofits, and social media strategies. The Iowa Commission on Volunteer Service and the INRC were joined by new partners which included the Grant Enterprise Management System (GEM\$), the Iowa Council of Foundations, the Iowa Department of Cultural Affairs, and the United Ways of Iowa.

The 2010 summit is scheduled for November in Ames. The theme is Building the Capacity of our Charitable Sector Through Volunteer Management and Nonprofit Effectiveness. The 2009 partners are once again planning the event and have been joined by the Iowa Campus Compact.

INRC Staff Biographies

Willard L. Boyd

Willard L. Boyd is a lawyer and an educator. He is Rawlings-Miller Professor of Law at The University of Iowa College of Law. He is also President Emeritus of The University of Iowa and The Field Museum of Chicago.

One of the founders of the Larned A. Waterman Iowa Nonprofit Resource Center, Boyd focuses on the role of nonprofits both in Iowa and nationwide. He also teaches courses on the legal and operational aspects of nonprofit organizations. In 2004 he was appointed by Governor Thomas Vilsack to chair the Task Force on the Role of Nonprofit Organizations in Iowa.

Boyd received his B.S.L and LL.B. degrees from the University of Minnesota and his LL.M. and S.J.D. degrees from the University of Michigan. He is a Chester A. Phillips Research Fellow at the University of Iowa Tippie College of Business as well as a member of the American Academy of Arts and Sciences, the American Law Institute, the Department of State Cultural Property Advisory Committee, and the board of National Arts Strategies.

Boyd has served as Chairman of the American Association of Universities; the National Museum Services Board; the Council of the Section on Legal Education and Admission to the Bar of the American Bar Association; the Center for Research Libraries (Chicago); the Harry S. Truman Library Institute; Iowa 2000 (1972-78), and Imagine Iowa (2001). He has also served as president of the National Commission on Accreditation; member of the National Council on the Arts; the Advisory Board of the Metropolitan Opera; the Advisory Committee for the Getty Education Institute for the Arts; the Board of Directors of Americans for the Arts; Elderhostel; Illinois Arts Alliance; the Advisory Board Chicago Department of Cultural Affairs; and Humanities Iowa.

Boyd was one of the first winners of the Charles Frankel Prize awarded in 1989 by the National Endowment for the Humanities which honored five Americans for their efforts to bring history, literature, philosophy and other humanities disciplines to general audiences. In 1996 he was selected as a Laureate by the Lincoln Academy of Illinois and received The Thomas & Eleanor Wright Award given by the Chicago Commission on Human Relations for individuals whose human relations efforts and activities have spanned all interest lines and for making The Field Museum a place where people of different backgrounds come together for a common reason. The Field Museum received the National Award for Museum Service in 1996 from the Institute of Museum Services. Boyd was the 1998 winner of the Award for Lifetime Services to the Public Humanities given by Humanities Iowa, the State Humanities Council, and received the Lifetime Achievement Award.

Jude P. West

Dr. Jude P. West is co-director of the Larned A. Waterman Iowa Nonprofit Resource Center and Professor Emeritus in Management and Organizations at the Henry B. Tippie College of Business Administration at The University of Iowa. He teaches Organizational Behavior in the Executive MBA program and co-teaches the Nonprofit Organizational Effectiveness courses.

West is retained as a consultant in the areas of planning, self-directing teams, and leadership development. From 1996 to 1998 he completed three week-long leadership training projects with the medical administrators in St. Petersburg and Novgorod, Russia. He taught the Organizational Behavior course in Hong Kong in the fall of 2003.

West's research interest areas are self-directing teams, burnout among professional and supervisory personnel, and management development. His articles in the management field have appeared in *The Conference Board*, *Journal of Small Business Management*, *Journal of*

Staff biographies, *continued*

Leisure Research, Personnel Administrator, and Training and Development Journal, as well as many other state and national publications. West is the author of the National Conference Board publication entitled, *Executive Development Programs in Universities*, and he co-authored the Cornell University text *Chain Drug Store Management and Operations*.

Administratively, he has served the UI's College of Business Administration in these assignments: Director, Executive MBA Program, 1978 to 1981; Director, Center for Labor and Management, 1969 to 1974; and Director, Executive Education from 1967 to 1997. West has also served on the board of directors of Drug Fair, Inc., Alexandria, Virginia from 1972 to 1981 and on the board of directors of the Iowa firms River Products Co. and Twin Dairy County, Inc. He was board president of Goodwill Industries of Southeast Iowa from 1970 to 1972 and Systems Unlimited, Inc. in Iowa City from 1996 to 1998. He served on the Board of Directors of the University of Iowa Alumni Association from 1998 to 2001 and was President of Systems Unlimited Foundation from 2000 to 2002.

From 1970 to 1988, West was retained as a management development consultant with the National Association of Chain Drug Stores, Alexandria, Virginia and also with the National Academy for Volunteerism, United Way of America, Alexandria, Virginia from 1975 to 1995.

West obtained his BA from St. Mary of the Lake, his MBA from the University of Chicago, and his Ph.D. from the University of Iowa. In 1985 he was awarded The University of Iowa Hancher-Finkbine Medallion for Learning, Leadership and Loyalty. In 2000, he received the Michael J. Brody award for Faculty Excellence in Service, the City of Iowa City's Human Rights Isabel Turner award for outstanding service to the community, and the ARC of Johnson County's Ruth Becker Award for service to the developmentally disabled. In 2001, he was named a Friend of Systems Unlimited Inc. for his long years of service to that organization.

Richard Koontz

Richard Koontz, Director of the Larned A. Waterman Iowa Nonprofit Resource Center, received his undergraduate degree from Hampshire College in Amherst, Massachusetts. He completed a master's degree at Northeastern University in Boston with a thesis on contemporary poetry. After graduating from the New England School of Law he went on to practice law in Boston at the Massachusetts Department of Revenue and the law firm of Goodwin, Proctor and Hoar where he did estate planning.

He was general counsel for Chicago's Field Museum of Natural History from 1991 to 1996. While at the Field Museum he dealt with issues involving Native American collections, human remains, environmental collections, public safety, and tax exemption. Since 1997 he has been an adjunct professor at The University of Iowa College of Law where he teaches Nonprofit and Cultural Property Law courses.

Richard is committed to helping Iowa nonprofits understand the legal and operational issues they face in performing essential community services. He played a significant role in the drafting and editing of the *Iowa Principles and Practices for Charitable Nonprofit Excellence* and travels around the state to instruct nonprofits about these self-regulatory guidelines. He is eager for the INRC to serve the nonprofits of Iowa in many capacities, including as an educational resource both on and off campus.

Funders

In 2000, the INRC was fortunate to receive a \$250,000 grant from the Roy J. Carver Charitable Trust. The funds, awarded over three years, helped the INRC cover basic needs such as computer equipment, Web site development, monograph publications, and library purchases as well as salaries.

In 2004, Mary Hubbell Waterman of Davenport endowed the INRC with \$2.5 million in memory of her husband, Larned A. Waterman, 47JD.

The Mansfield Charitable Foundation pledged \$250,000 in 2008 to finance the Mansfield Nonprofit Research and Publications Fund which is designed to advance INRC's efforts to provide timely and practical printed resources to nonprofit start-ups and existing organizations.

The Qwest Foundation has generously funded Iowa Principles and Practices for Charitable Nonprofit Excellence training tours on four occasions. In 2008, Qwest also funded the statewide Iowa Conference on Volunteer Service.

Staff and Student Workers

The Larned A. Waterman Iowa Nonprofit Resource Center could not have succeeded for ten years without the hard work of staff, student assistants and volunteer lecturers. We thank each and every one of them for their excellent contributions during our first ten years.

Staff

Willard "Sandy" Boyd, Richard Koontz, Jude West, Bruce Karmazan, Joyce Cerretti, Lin Pierce, Mary Kay McCune, Judy Rowles, Judy Slezak, Brenda Steinmetz, Diane DeBok, Sarah Anderson, Wayne Prophet

Student Workers and Graduate Assistants

Yu Yu, Xiaobei Chen, Saurav Pandit, Jill Smith, Kui Wang, Ben Lewis, Holly Huffman

Law Research Assistants

John Allen, Sydney Benson, Michelle Booker, David Bright, Courtney Brown, Jia Chen, Jerome Coenic-Taylor, E.J. Flynn, Malika Fulton, Brent Gardner, Freeman Green, Wei Guo, Scott Hancock, Matt Hoffman, Curt Liams, Jeannine Jenkins, Yuqin Jin, Sam Jones, Ryann Juden, Kathleen Kadlec, Elizabeth Kemp, Minji Kim, Cory Lasker, Cynthia Lohman, Thyanda Mack, Justin Martin, Erin McBride, Jaimie Mancham-Case, Xu Mingzhao, Corwyn Moore, Jennifer Moyer, Shawn Naidu, Eric Nemmers, Terry Northrup, Sonny Olsen, Jaqueline Orozco, Reuben Ortega, Andrew Potter, Nathan Roberts, James Sheets, Virginia Sipes, Will Street, Le'Ora Tyree, Justin Vance, Brent Walters, Janee Weaver, Jacob Wessel, Cara Wick, Tyson Wray, Yan Yan, Michael Youngblut, Joseph Younkens, Jin Yugin, Xiaole "Joy" Zhang, Songsong Zhang

Undergraduate Scholar Assistantship—Iowa Advantage (USA-IA)

Jessica Moeller, Andrew Stoll

Task Force Members

Willard L. Boyd, Regan Banks, Lu Barron, Senator Nancy Boettger, Philip Borleske, Mary Ann Burke, Senator Mike Connolly, B.J. Do, Sally Falb, Representative Wayne Ford, Ken Gibson, Stanley Howe, Jon Hrabe, Andria Macias-Castillo, Joan McCulloch, Kori Nielsen, Shelia Perry, Representative Scott Raecker, Shannon Ramsey, Kathy Toborg, and Thomas Wilson

Secretary of State Chet Culver, Mollie Clause, Assistant Attorney General Shauna Shields, Adam Lounsberry and Joseph Mowers

Guest Teachers of NOE and Nonprofit & Philanthropic Organizations

Floyd Akins, Eric Andersen, Chris Atchison, Dan Baldwin, Connie Benton Wolfe, Dan Berkowitz, Warren Boe, Terry Boles, Willard L. Boyd, Kenneth Brown, Mary Ann Burke, Pat Cain, Wally Chapel, Dave Collins, Pam Creedon, Gina Crosheck, Marcella David, Monique DiCarlo, Deb Dunkhase, James Elmborg, Tamara Erb, Jim Ernst, Jack Evans, Patti Fields, Scott Fisher, Kristie Fortmann-Doser, Nancy Garberson, Leslie H. Garner, Susan Hagen, Kay Hegarty, David Hensley, Randy Hirokawa, Andrew Hosmanek, Joan Huntley, Maggie Jesse, Amy Johnson-Boyle, Scott A. Ketelsen, Val Lembke, Casey Mahon, Robert Massey, Heather MacDonald, Mary Mathew Wilson, Marc Mathis, Matt McGarvey, Shannon Miller, Cheryle Mitvalsky, Lon Moeller, Katie Oberbroeckling, Sonny Olson, Christine Pawley, Paul Retish, Anne Rhodes, Troy K. Ross, April Rouner, Sara Rynes, Darlene Schmidt, Jeffrey Schott, Robert A. Sevier, Andrew Sheehy, Tim Shields, Mark Sidel, Jill Smith, Dean Spina, John Spitzer, Rachel Stewart, Ethan Stone, Gary Streit, Dan Strellner, Alex Taylor, Dave Triplet, Michael VanMilligan, Emmett Vaughn, Jude West, Peter Wilch, and Jason Wright.

Continuing Legal Education Speakers

Dan Baldwin, Randall Bezanson, Willard L. Boyd III, Pat Cain, Bruce I. Campbell, Sadie Copeland, Robert N. Downer, Thomas Gelman, Harry M. Griger, Fran Hill, Bruce Hopkins, Carolyn Jones, Sheldon Kurtz, John McCormally, Marc Mills, Lon Moeller, Darrel A. Morf, Theresa Pattara, J. Edward Power, Mark Sidel, Dean Spina, Gary Streit, Nancy VanMilligen, Jude West, and Dean Zerbe.

Appendix

Continuing Legal Education

October 19–20, 2001

“Iowa Nonprofit Organizations (Legal, Tax and Ethical Issues of Tax Exempt 501(c)(3) Organizations),” Iowa City, Iowa. Speakers: Darrel Morf, Pat Cain, Harry Griger, Randall Bezanson, and Marc Mills

November 1–2, 2002

“Tax-Exempt Organizations and Wealth Transfer Issues,” Iowa City, Iowa. Speakers: Bruce Hopkins, Robert Downer, Pat Cain, Fran Hill, and Sheldon Kurtz

October 1-2, 2004

“Iowa Nonprofit Organizations (Legal, Tax and Ethical Issues of Tax Exempt 501(c)(3) Organizations),” Iowa City, Iowa. Speakers: Darrel Morf, Sadie Copeland, Dean Zerbe, Bruce Campbell, and Robert Downer

November 4, 2006

“Nonprofits and Government Entities,” Iowa City, Iowa. Speakers: David Vestal, Shauna Shields, Michael Tramontina, JoAnne Spears, Donald Hemphill, and Ivan Webber

September 5-6, 2008

“Nonprofit Law,” Coralville, Iowa. Speakers: John McCormally, Theresa Pattara, Gary Streit, Dean Spina and Thomas Gelman

Off-Campus Instruction

2000

October 5, "Nonprofit Survey," Region IX meeting of Big Brothers/Big Sisters, Des Moines (Koontz)

November 10, "The Role of the Board," Iowa-Illinois Red Cross Public Support Conference, Moline, Illinois (Boyd)

2001

September 12, "Nonprofit Practice" Black Hawk County Bar Association, Waterloo (Boyd)

September 13, "Potential Board Liability and Risk Management", USDA, Sioux City (Koontz)

September 19, "Nonprofit Law," Association of Fundraising Professionals in Eastern Iowa, Ames (Boyd)

October 4, "Nonprofit Governance," Cedar Rapids (Boyd)

2002

January 10, "Role of Nonprofits in Community Building," Quad Cities United Way (Boyd)

January 11, "Nonprofit Governance," Chicago Community Trust, Illinois Arts Alliance (Boyd)

January 25, "Role of Community Foundations," Community Foundation of Johnson County, Seminar for Professionals (Boyd)

January 28, "Iowa Nonprofit Center," United Way of Johnson County Agencies (Boyd)

January 29, "A New Look at Governance," Alliant/Cedar Rapids Community Foundation (Boyd)

February 14, "Iowa Cultural Scene," Des Moines Rotary Club (Boyd)

February 25, "Role of Nonprofits in Community Building," Spencer Kiwanis Club (Boyd)

March 15, "Board Governance," Board Mississippi River Museum, Dubuque (Boyd)

March 26, "Role of Nonprofits in Community Building," Iowa Municipal Management Institute, Iowa City (Boyd)

November 2, "Donor/Donor Ethics and Accountability," Tax Exempt Organizations and Wealth Transfer Issues CLE, University of Iowa College of Law, Iowa City (Koontz)

2003

September 16, "Laws That Impact Your Fundraising Program," Association of Fundraising Professionals, Iowa City (Koontz)

2004

October 2, "Development of Iowa Standards of Nonprofit Excellence," Iowa Nonprofit Organizations CLE, University of Iowa College of Law, Iowa City (Koontz)

November 19, "The Revised Iowa Nonprofit Corporation Act," University of Iowa College of Law, Business Law CLE, Iowa City (Koontz)

2006

January 19, "Supervision/Delegation," Marshalltown Nonprofit Management Program, Marshalltown (West)

January 20, "Board Governance," Putnam History and Natural Science Museum/IMAX Theater, Davenport (West)

February 18, "Board Governance," United Way of Johnson County Board Bank for Students (West)

March 27, "Board Governance," Greater Iowa City Chamber of Commerce (West)

April 18, "Board Governance," Des Moines United Way/ Community Foundation's Board Launch program, Des Moines (West)

May 18–19, Diversity Leadership Workshop, Iowa City (Boyd)

Off-Campus Instruction, *continued*

May 22, “The Essence of Community: Iowa’s Charitable Nonprofit Organizations,” Rotary Club, Muscatine (Boyd)

June 8 and December 11, “Organizational Development Through Teams, Teambuilding and Trust,” Quad Cities Nonprofit Management (West)

August 16, “Nonprofit Oversight and the Iowa Principles and Practices for Charitable Nonprofit Excellence,” Iowa Grant Symposium, West Des Moines (Boyd)

September 20, Iowa State University Nonprofit Management Academy, Davenport (Boyd)

September 21, Iowa State University Nonprofit Management Academy, Iowa City (Boyd)

September 27, School Foundation Conference, Des Moines (Boyd)

October 24, “Best Practices in Nonprofit Management and Accountability,” Board Launch, Des Moines (West)

October 26, Iowa Council of Foundations, Des Moines (Boyd)

October 31, “Volunteer Screening—Legal Issues,” Iowa Commission on Volunteer Service, Volunteer Conference (Koontz)

November 1, “Strategic Planning,” Governors Commission on Volunteerism Conference, Des Moines (West)

November 4, “Compliance and Disclosure in the Iowa Principles and Practices for Charitable Nonprofit Excellence,” Nonprofit and Government Entities CLE, University of Iowa College of Law, Iowa City (Koontz)

November 17, “Board Governance,” Stanley Foundation, Muscatine (West)

November 19, “Leadership for Five Seasons, Session IV— Personal Leadership: Reaching Your Full Potential,” Kirkwood Training and Outreach Services Center, Marion (Boyd)

November 30, “Board Governance,” Johnson County United Way Board, Iowa City (West)

2007

January 11, “Supervision,” ISU Nonprofit Management Academy, Council Bluffs/Omaha (West)

January 23, “Nonprofit Law,” Project Destiny Partnership, Des Moines (Koontz)

February 20, “Impact of Charitable Nonprofit Organizations on Iowa’s Economy and Quality of Life,” (West with Mike Miller, Iowa Department of Economic Development)

March 8, Volunteer Awareness Day (Koontz)

May 4, “Fractional Interests,” Annual Spring Tax Institute (Koontz)

May 17, “Connecting Workplace Leadership and Diversity,” Cedar Rapids Chamber of Commerce, Cedar Rapids (West and Retish)

May 24, “Board Leadership Orientation,” Greater Des Moines Leadership Institute, Des Moines (West)

June 21, Scott County CLE, Davenport (Koontz)

July 19, “Fiduciary Duty,” Johnson County Community Foundation board of directors, (Koontz)

August 30, HUD Grant writing workshop, Coralville (Koontz)

September 28, “Nonprofit Board of Directors,” Iowa State Bar Association, Iowa City (Koontz)

October 6, “Starting an Iowa Charitable Nonprofit,” Iowa City (Koontz)

2008

January 8, “Board Training,” ABBE, INC. Cedar Rapids (Koontz)

January 26, April 5, May 17, June 28, “Starting an Iowa Charitable Nonprofit,” Iowa City (Koontz)

February 8, “Starting an Iowa Charitable Nonprofit,” Jefferson (Koontz)

February 9, “Starting an Iowa Charitable Nonprofit,” Grand Junction (Koontz)

March 15, “Starting an Iowa Charitable Nonprofit,” Donnellson (Koontz)

March 27, “Board Development,” United Way Association panel Des Moines (Koontz)

April 1, “Board Development,” Omaha, Nebraska (Koontz)

Off-Campus Instruction, *continued*

May 5, Association of Fundraising Professionals Conference, Des Moines (Koontz)
May 15, "Supervision," Johnson County (West and Retish)
August 6, "Board Governance," Council Bluffs (West)
October 8, "Organizational Development Through Change, Teambuilding and Trust," Quad Cities (West)
October 16, "Risk Management," Nonprofit Management Academy, Coralville (Koontz)
September 10, "Nonprofit Law Overview," Quad Cities (Boyd and Koontz)

2009

February 7, "Starting an Iowa Charitable Nonprofit," Ames (Koontz)
February 17-18, "Collaboration," statewide nonprofit conference, Des Moines (Koontz)
March 7, "Starting an Iowa Charitable Nonprofit Workshop," Iowa City (Koontz)
May 1, "Nonprofit Tax Basics," Spring Tax Institute, Iowa City (Koontz)
May 2, "Starting an Iowa Charitable Nonprofit Workshop," Iowa City (Koontz)
May 8, "Volunteer Risk Management," Volunteer Administrators Network, Iowa City (Koontz)
September 19, "Starting an Iowa Charitable Nonprofit," Iowa City (Koontz)
December 5, "Starting an Iowa Charitable Nonprofit," Iowa City (Koontz)

Principles and Practices Training

2006

June 1, Scott Community College, Davenport
June 5, Kirkwood Community College, Cedar Rapids
June 13, Hawkeye Community College, Waterloo
June 15, Town Clock Center for Professional Development, Dubuque
June 21, Iowa Western Community College, Council Bluffs
June 22, Western Iowa Tech, Sioux City
June 27, Des Moines Area Community College, Ankeny
October 26, Iowa Council of Foundations Membership Meeting, Des Moines

2007

January 18, Iowa Legal Aid telephone conference
February 3, Iowa Soccer League, Ames
May 22, Southeastern Community College, West Burlington
May 31, Iowa Valley Community College District, Marshalltown
June 5, Indian Hills Community College, Ottumwa
June 6, Southwestern Community College, Creston
June 12, Northwest Iowa Community College, Sheldon
June 13, Iowa Lakes Community College, Estherville
June 19, Iowa Central Community College, Fort Dodge
June 20, North Iowa Area Community College, Mason City

2008

April 29, Des Moines Community Foundation, Des Moines
May 5, Association of Fundraising Professionals, Des Moines

Principles and Practices Training, *continued*

2009

February 18, Wallace Building, Des Moines

June 4, Putnam Museum, Davenport

June 23, State Historical Building, Des Moines

June 25, Western Iowa Tech Community College, Sioux City

Other Training

2001

May 7, Symposium—"Religion, Government, and Community Building", University of Iowa, Iowa City

2006

October 31-November 1, Iowa Volunteer Conference, Des Moines

2007

Iowa Agency on Aging training contract

October 28-29, Statewide nonprofit conference


November 13-14, Volunteer Conference, Altoona

2008

Iowa Agency on Aging training contract

Credits

Diane DeBok, design and editing; Tsering Nangyal, interviews and editing contributions

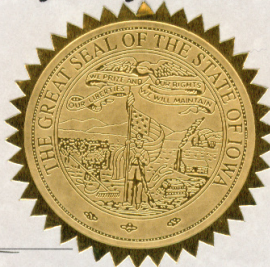

State of Iowa
Executive Department
IN THE NAME AND BY THE AUTHORITY OF THE STATE OF IOWA
Certificate of Recognition

Chester J. Culver
Governor of the State of Iowa
Hereby officially recognizes

*Larned A Waterman Iowa
Nonprofit Resource Center
10 Years of Service*

The Larned A. Waterman Iowa Nonprofit Resource Center (INRC) was created at the University of Iowa in 2000 to reach out to all parts of Iowa to help nonprofit organizations. INRC is a University of Iowa interdisciplinary collaboration that strives to increase accessibility to more educational and service programs focused on strengthening the operational capacity of Iowa nonprofit organizations. The center works collaboratively with government agencies, nonprofit organizations and educational institutions, creating new knowledge through activities and provides information and training resources to help nonprofit organizations and interested persons throughout Iowa. INRC seeks to build the capacity and develop and enhance the effectiveness of community-based organizations in building communities, while introducing students to the nonprofit sector and promoting a commitment to public and community service.

On behalf of all Iowans, we congratulate the board, staff and volunteers of the Iowa Nonprofit Resource Center as they celebrate 10 years of service.



IN TESTIMONY WHEREOF, I HAVE
HEREUNTO SUBSCRIBED MY NAME AND
CAUSED THE GREAT SEAL OF THE STATE
OF IOWA TO BE AFFIXED. DONE AT DES
MOINES THIS 16th DAY OF NOVEMBER
THE YEAR OF OUR LORD TWO
THOUSAND NINE.
Chester J. Culver
CHESTER J. CULVER
GOVERNOR

ATTEST:
Patty Judge
PATTY J. JUDGE
LT. GOVERNOR

Lieutenant Governor Patty Judge presented a Certificate of Recognition to the Larned A. Waterman Iowa Nonprofit Resource Center in November 2009. The certificate acknowledged the INRC's ten years of service and was presented during the Iowa Nonprofit Summit in Des Moines.



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