2020 wasn’t the year any of us expected, but it served as a reminder of why Dakota Medical Foundation exists: to improve the health and quality of life for people in our region. That mission became even more essential in the midst of a global pandemic.

As the world turned upside down, we were fueled by the ever-growing needs of charities and individuals across North Dakota and northwest Minnesota. And channeling the pioneering spirit of Dakota Hospital’s founders – without whom none of us would be here today – we led the way into bold new frontiers.

Following another record-breaking Giving Hearts Day, our team pivoted quickly in response to COVID-19. We created a crisis response platform, Helping Hearts; started the DMF/Impact/Alex Stern COVID-19 Critical Services Fund to support our region’s frontline workers; and distributed a substantial amount of personal protective equipment across the region. Along with the inaugural Play It Forward golf event – hosted alongside Bell Bank, Forum Communications, and WDAY – Helping Hearts raised more than $1 million for local urgent-needs charities.

While these campaigns helped countless local organizations keep their doors open, it was quickly apparent that nonprofits would need to learn to successfully navigate an entirely new world if they were going to thrive.

The High Impact Institute helped charities rethink their digital events, learn how to fundraise over Zoom, and started a weekly webinar series covering a wide range of pandemic-related topics. COVID also accelerated the development of the Institute’s commercialization efforts, with the launch of our first two digital courses, Leading in Turbulent Times and the COVID-19 Playbook, with digital events and board of directors curricula to follow.

Navigating new ways to help and guide charities this year, Giving Hearts Day pivoted by creating new non-financial ways to give. Volunteerism and new-and-used goods donations were added to the menu of giving options, with the launch of our first-ever Giving Hearts Day sweepstakes – providing people with an added incentive to get involved for the long haul.

Digital innovation became a theme across the rest of our programs as well, with Lend A Hand Up debuting a new online auction tool and year-end giving event, LevelUp launching a new interactive website for parents, and Stand to Protect moving its entire curriculum to an online format.

With the tumultuous year that was 2020 now behind us, we enter 2021 with a renewed sense of hope and optimism for the future of our region. And with many nonprofits still struggling to survive, widespread mental health and addiction issues, and an ever-evolving public health situation, we recognize we still face many challenges. Regardless of what this year brings, though, we will continue to spread a message of care, kindness, and compassion for one’s neighbor.
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DMF's 2020 estimated economic impact can be broken down into the following:

- Building "In-Kind" Usage: $101K
- Member/Employee Match Grants: $140K
- Grants to Charities: $903K
- Outside Grants Secured: $965,000
- Lend A Hand Up: $1.2M
- DMF's 110 Charitable Funds distributed $1.33M in grants to health charities
- Investment Income and other revenue: $5.8M
- Giving Hearts Day: $19.2M

Total: $29,639,000+
Dakota Medical Foundation is diligent in its choice of investment firms and closely monitors the structure of its portfolio for risk, long-term stability, and performance, as carefully outlined in our investment policies. DMF’s chosen firms predominantly use a “manager of managers” approach, rigorously selecting and overseeing proven individual asset managers. DMF assets are conservatively invested and broadly diversified. DMF has the income stream to operate initiatives, provide grants, and meet operating expenses without liquidating long-term investments during market lows.

### ANNUAL FINANCIAL AND INVESTMENT REPORT

As of and for the years ended September 30, 2020 and 2019

<table>
<thead>
<tr>
<th>BALANCE SHEETS</th>
<th>FISCAL YEAR 2020</th>
<th>FISCAL YEAR 2019</th>
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<td><strong>Liabilities and Net Assets</strong></td>
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<td>Payables and accrued expenses</td>
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<td>Net assets without donor restrictions</td>
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<td>Net assets with donor restrictions</td>
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<td><strong>CHANGE IN NET ASSETS</strong></td>
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LEVELUP FARGO AND MATTO FOUNDATION

DELAY, DECREASE, DEFEAT

LevelUp Fargo made significant strides in 2020 toward its mission of helping kids and families develop the meaningful connections necessary to reduce youth alcohol and drug use.

The program launched an updated website that serves as a comprehensive resource for families. It provides a number of tools, highlighted by the Crisis Roadmap. The roadmap is an interactive page that directs families toward a variety of resources, depending on the nature and extent of the issues they’re facing.

MORE WAYS TO ENGAGE

This year, LevelUp Fargo added two new ways parents and caring community members can engage with the program: a monthly newsletter called “Connections” and a monthly webinar series.

Connections keeps subscribers updated on LevelUp events and includes a variety of tips and resources for dealing with substance-related issues. The webinar series features subject-matter experts, clinicians, and practitioners, who take an in-depth look at a variety of addiction topics. Adding these resources to the LevelUp Fargo toolbelt has deepened community engagement.

MATTO FOUNDATION

With missions that closely align and support each other, LevelUp Fargo and the DMF-hosted Matto Foundation have been working closely over the past year to delay, decrease, and defeat youth substance use.

Matto Foundation Cofounders Dr. Mike and Mary Beth Traynor participated in a number of community events over the past year, as well as a series of adolescent brain videos that were distributed via a targeted digital campaign.

2021 GOALS

1. Build a parent survey tool.
2. Host a “state of the state” on youth mental health and addiction.
3. Help local addiction and mental health nonprofits become better fundraisers.

COMMUNITY REPORT

In 2020, LevelUp Fargo released its most recent community report, which surveys thousands of Fargo kids and serves as our greatest insight into the well-being of our local youth.

One of the most troubling findings was that about 1 in every 5 Fargo high school teens thought about, planned, or attempted suicide in 2019. The isolation brought on by COVID-19 restrictions has only further contributed to the rising levels of mental distress in kids.

The link between poor mental health and substance abuse is direct. The developing brains of youth are especially susceptible to both. This timely report looks at the many facets of the problem and calls on us to recognize its amplification in our changing world.

Click here to read LevelUp Fargo 2020 Community Report

1 in 5 Fargo teens in grades 9-12 thought about, planned, or attempted suicide in 2019.
Many adults are unaware of the fact that one in 10 children will be sexually abused before turning 18. Stand to Protect strives to empower all adults to be a force for change.

Child sexual abuse continues to be an epidemic afflicting society’s most vulnerable. It often occurs behind closed doors, but adults need not feel helpless. With its evidence-informed (soon to be evidence-based) curriculum, Stand to Protect familiarizes adults with common abuser behaviors. In addition to its signature training, a variety of resources are offered for a variety of caring adults: parents, extended family, and those working in childcare and other youth-serving organizations.

Due to the COVID-19 pandemic, in-person trainings at businesses, civic groups, and youth-serving organizations have been suspended indefinitely. That’s why in 2021 Stand to Protect will offer a virtual training option. Doing so will make the courses even more convenient and accessible to caring adults across our region.

2021 GOALS

1. Launch a digital curriculum on Teachable (online learning platform).
2. Distribute a monthly newsletter to raise awareness about the child sexual abuse epidemic and provide education and resources to caring adults across the region.
3. Hire a new Director of Training and Outreach to grow the scope and reach of the program.

“A future where thousands are reached by Stand to Protect means eyes will be opened, practical steps known, and adults protecting like never before. That’s how we end child sexual abuse and its tragic mental and physical health consequences.”

Anna Frissell
RRCAC Executive Director
Stand to Protect Steering Committee Member

DMF would like to express its utmost gratitude to Tami Rust for her two years of leading the Stand to Protect movement. Her passion for the cause set into motion a more promising future for children, and her dedication laid a stable foundation for the program to build on. We couldn’t be more thankful to her for answering the call to prevent and defeat child sexual abuse.

Tami Rust, Former Director of Stand to Protect
Henrik’s Heroes was founded in 2019 with the belief that the most heroic acts often come from the most unlikely sources.

At just four years old, Henrik Westerholm was diagnosed with leukemia. His mother, Janna, felt at a loss for how she could possibly lessen the burden on her young son, but as treatments went on, a new friend came into Henrik’s life. His name was Aaron, and he had a similar condition to Henrik. Aaron would be the spark that ignited the idea of Warrior Dolls, medical play dolls that Henrik’s parents and medical staff used to familiarize Henrik with procedures (and simply be a companion).

When Janna saw how much courage and peace of mind a simple toy gave her son, she realized what it could mean for other families feeling equally defenseless.

With Henrik’s cancer now in remission, the mission of Henrik’s Heroes is thriving. The fund has helped more than 100 children find a friend in a Warrior Doll, and it has also started supplying newly diagnosed families with Go Bags, which are filled with a variety of things to assist them in the journey ahead.

Another element of Henrik’s Heroes, the Toy Locker, provides area hospitals with toys for rewarding kids and building confidence during medical procedures. This year, Legacy Toys in Fargo’s West Acres mall was closed for an entire evening to allow young patients to scour the store and pick out items for the Toy Locker. Janna says their eagerness to provide comfort to fellow kids is what distinguishes them as “Heroes.”

The experience also reinforced for the Westerholms the driving belief behind the fund: There’s a hero in all of us.

*If you’re interested in establishing or supporting a fund at DMF or Impact Foundation, email Info@dakmed.org or call 701-271-0263.*

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**DONOR FULFILLMENT AT A GLANCE**

<table>
<thead>
<tr>
<th></th>
<th>DMF</th>
<th>Impact Foundation</th>
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<tbody>
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<td><strong>TOTAL FUNDS</strong></td>
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<td><strong>120</strong> grants distributed</td>
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<tr>
<td></td>
<td><strong>$1,018,074</strong> in grants</td>
<td><strong>$798,706</strong> in grants</td>
</tr>
</tbody>
</table>

*As of 9/30/2020*

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“I can’t believe the generosity in our community. It’s truly humbling to see how many people are willing to support Henrik’s Heroes.”

Janna Westerholm
Like most of DMF’s programs, once COVID-19 hit, Lend A Hand Up (LAHU) was in need of a revamp. The in-person benefits that served as the lifeblood of the organization for years were no longer a viable option, so it was time to adapt.

"Since the environment changed but not the need, a quick pivot was crucial to develop new ways for people to help their neighbors," says LAHU Program Director Jeana Peinovich.

So LAHU went online. A brand new online auction tool was added to the program’s website in June, and soon physical hugs were replaced with digital words of affirmation. The website became a new, albeit different, place to gather.

What stayed the same was the program’s ability to support families and make gifts go further. With financial support from DMF, LAHU continued to provide a 20% boost to all gifts made to individual family fundraisers and continued to ensure that 100% of gifts went directly to families.

BIG BOOST WEEK

Another bold risk LAHU took this year was hosting a brand new event, Big Boost Week. For one week at the end of November and beginning of December, donations of $10 or more:

• Increased in value by 20%
• Provided immediate relief to 14 local families
• Became eligible for daily Big Boost drawings of up to $5,000

The event, which raised $115,000 in its inaugural year, offered a unique incentive by allowing donors to provide direct help to all 14 active fundraisers – with all the usual giving options available as well.

2021 GOALS

1. Develop and host a new mid-year Big Boost event.
2. Enhance engagement capabilities on the website (a la Caring Bridge).
3. Expand the Lend A Hand Up gift card program to Detroit Lakes area.
The North Dakota Dental Foundation (NDDF) is seeking to make oral health more affordable and accessible for all North Dakotans. Identifying the many needs that improve access to dental care, they’ve set in motion several initiatives targeting each aspect.

The Bright Futures in Dentistry program promotes careers in dental assisting. Bright Futures targets current high school students as they decide on their career path, and thanks in part to this emphasis, 2020 saw the first high school dental assisting class in North Dakota.

Another NDDF program, Dental Rental, provides portable dental equipment for dentists to provide care beyond the confines of their practice. This community outreach program allows dentistry to go further.

KIDS WITHOUT CAVITIES

NDDF’s Kids Without Cavities campaign was a real highlight of 2020. This digitally driven effort to get kids on track with good oral health reached 64,000 North Dakotans and featured kids doing a series of tasks that should require (but were lacking) adult supervision. The idea behind the campaign was that the same supervision should apply to toothbrushing.

1. Brush for two minutes, twice a day.

2. Reduce sugary beverages.

3. Assist your child with brushing until at least the age of eight.

2021 GOALS

1. Co-host the North Dakota Mission of Mercy event in Bismarck.

2. Increase the number of registered dental assistants from 687 to 700 by May 30, 2021.

80% of a child’s learning ability relies on vision.

Vision problems affect 70% of juvenile delinquents.

1 in 4 kids starting kindergarten have vision problems.

The Optometric Foundation of North Dakota (OFND) is working to ensure that kids of all backgrounds receive the eye care they need. OFND envisions a future with clear sight and unlimited potential for all. Its ultimate goal is to eliminate amblyopia (lazy eye) from North Dakota children. They are continuously building toward that outcome by prioritizing early identification of vision problems. The mission focuses on children, seeing their age as a pivotal time in establishing strong learning skills, which is hindered when vision problems are present.

OFND’s Vision Start initiative aims to make comprehensive eye exams available to children entering kindergarten. Detecting visual impairment early on in their education decreases the possibility of falling behind their classmates. It also lessens the likelihood of further problems later on, such as diabetes or mobility issues. One $75 donation provides one eye exam to a four- or five-year-old who may not otherwise be financially eligible.

Launched in 2020, Vision Start has already been successfully implemented by one-quarter of North Dakota optometrists. OFND plans to build off the momentum in the years to come and make free comprehensive eye exams even more widespread.

2021 GOALS

2. Recruit a total of 75 providers to the Vision Start program by Dec. 31, 2021.
3. Provide a free comprehensive eye exam to at least 50 children through the Vision Start program by June 30, 2021.

THREE EASY STEPS

Here’s how you can receive a free eye exam for your child:

1. VISIT VisionStart.org to submit your application.
2. COMPLETE your application in two minutes to find out if you’re approved.
3. SCHEDULE a free eye exam (if approved) with a participating provider.

25%
GIVING HEARTS DAY

HELP SOMEONE

The numbers speak volumes. Giving Hearts Day (GHD) continues to rise to new heights each year. The day of generosity has seen a snowball effect in both donations and participation, and GHD 2021 is projected to be no different.

Thanks to its tremendous growth, GHD has set even bolder goals. By 2025, GHD aims to become the No. 1 giving day in the nation and hopes to help our region become No. 1 nationally in volunteerism. With this vision paving the way, the nearly 500 participating charities will engage exponentially more people and help them find true meaning in helping their neighbors.

COVID-19 PIVOT

Not long after GHD 2020 saw its 13th consecutive record-breaking event, the COVID-19 pandemic struck. While it was an adjustment for the entire nonprofit world, to be sure, it was soon clear what a tremendous opportunity it was as well. Investment and training in digital resources were suddenly pushed to the top of every charity and foundation’s priority list. Suddenly, geographic limitations and time constraints have become much smaller hurdles.

In addition to adding new digital and hybrid training offerings, the GHD team updated its website to provide more giving options – volunteerism and material goods – and serve as a true year-round resource for businesses, schools, and individuals.

A new search functionality provides donors with better tools to more easily search the nearly 500 participating charities and more easily make decisions about which causes to fund, volunteer, or donate goods to.

The adaptations made in response to COVID-19 exemplify what it means to be part of such a generous region. Giving Hearts Day serves as an annual reminder of the reward that comes from helping someone, no matter the state of the world. The community’s eagerness to give knows no bounds.

2021 GOALS

1. 75,000 Giving Hearts on Feb. 11, Giving Hearts Day 2021
2. 250+ Giving Hearts Businesses engaged in GHD 2021
3. Expanded mission to include volunteerism and goods

Erica Johnsrud, Development Director of Ronald McDonald House Charities of the Red River Valley, shares an embrace with DMF Executive Director Pat Traynor

2020 BY THE NUMBERS

- $1.4 MILLION raised by Anne Carlsen Center in one day
- $19.2 MILLION raised through donations
- $90 MILLION raised since event’s founding in 2008
- 34,711 Giving Hearts donated
- 200+ Businesses engaged in the Giving Hearts Business program
- 30+ Local schools engaged in the Giving Hearts School program
Following the excitement of Giving Hearts Day (GHD) 2020, there wasn’t much time to catch a breath. As a global pandemic bore down on the region, the GHD team sprang into action. Helping Hearts was a 19-day giving campaign held from April 20 - May 8 that was launched to help combat the many challenges presented by COVID-19.

Charities’ urgent needs were assessed via a series of surveys sent out to nonprofits across the region. The results were staggering and showed that half of charities had no plan in place to replace revenue lost to the pandemic.

Helping Hearts raised awareness of both the dire financial situation that most charities found themselves in and generated nearly $1 million in online donations over just two and a half weeks. Additional contributions were made via grants and a Helping Hearts apparel collection.

It was an abrupt turnaround, but the GHD website was transformed into a crisis response platform and a tool at the ready should another disaster present itself in the future. Led by our Giving Hearts Day cohosts, DMF, Impact, and Alex Stern Family Foundation, Helping Hearts was a true community-wide effort that showed our region’s ability to lift each other up and support charity during times of crisis.

HELPING HEARTS 2020 QUICK STATS • APRIL 20 – MAY 8, 2020

- **45%** of charities may lose $25K-100K in donations*
- **67%** of charities expect increased demand for services*
- **52%** of charities can’t operate more than six months with current cash on hand*

*March 16, 2020 survey results
I chose to play for Dakota Boys and Girls Ranch because of the incredible work they do in helping children get the treatment they need and providing a safe environment for them to live, learn, and heal. The Dakota Boys and Girls Ranch headquarters is in Minot (North Dakota), my hometown, which has a special place in my heart.

Josh Duhamel
Play It Forward Participant
COVID-19 RESPONSE
Not long after helping the Giving Hearts Day charities raise another record-breaking total ($19.2 million), the High Impact Institute quickly got to work adapting to the COVID-19 pandemic. The Institute helped execute the Helping Hearts and Play It Forward fundraising campaigns, distributed surveys across the region to assess charities’ urgent needs, and helped bring in dollars from partner foundations that was dispersed as emergency grants to frontline nonprofits.

To help charities adapt to the new normal, the Institute began hosting live webinars, launched a weekly newsletter, and began producing short social media videos on a variety of pandemic-related topics. From taking in-person events online to leading an organization during crisis, the topics ran the gamut and provided some much-needed clarity and encouragement to our charity friends.

Perhaps the most significant transformation, though, was to the Institute’s coaching and training program. Delivering courses and content through a digital cohort model allowed for exponentially more training and coaching to take place across a much larger geographic region. The networks and relationships that were developed were invaluable to the charities.

NEW WEBSITE AND COMMERCIALIZATION
Arriving in May 2021 is the brand new High Impact Institute website. The site will better support the delivery and sale of our commercial products — such as “Engaging Digital Events” and “High Impact Board Leadership” — and will give us the ability to produce and sell highly customizable charity inventories and reports. It will also function as a one-stop shop for webinars, live events, and free content.

The website will ultimately position us as an information hub for healthy, high-performing charities, workplaces, and individuals both locally and eventually nationally.

VIDEOGRAPHY AND DIGITAL TRANSFORMATION
In March, we hired the Institute’s first-ever full-time videographer. Evan Balko was brought on as the new multimedia lead, hired to support not just the High Impact Institute but also Giving Hearts Day, DMF’s programs, and our nonprofit partners.

In what turned out to be an impeccably timed hire, Evan started just as the pandemic began to ramp up and was instrumental in creating and distributing a wide variety of content and marketing. He produced a total of 160 videos and ads over the course of the year and has transformed the way the foundations develop and distribute communications.

The ROI of a full-time video department was so apparent that, this past fall, the DMF built a full-time production and editing studio. This has allowed for even more rapid development of assets and will help the Giving Hearts Day team host its first self-produced Giving Hearts Day broadcast in February 2021.

2021 GOALS
1. Host four digital coaching cohorts throughout 2021
2. “Engaging Digital Events” product for sale by end of February 2021
3. “High Impact Boards Leadership” product for sale by end of February 2021
GIVING HEARTS AWARDS 2020

Giving Hearts Awards are presented to select individuals and organizations that exemplify care, kindness, and compassion for their neighbors. Through their servant leadership, they act as a model for others to follow and emulate.

Under the leadership of the Solberg and Snortland families, Bell Bank is a standout in the realm of generosity and commitment to their employees and communities. In the middle of a pandemic, they stood up and led a massive giving effort benefitting several front-line charities.

AWARD LANGUAGE

For continuously innovating and finding new ways to serve our community. Your bold response to the COVID-19 pandemic and leadership of the Play It Forward fundraiser ensured that our frontline workers, charities, and organizations received the protection and care they needed at a time of great uncertainty. Your Giving Hearts serve as a model of kindness for others to follow.
GIVING HEARTS AWARDS 2020

Giving Hearts Awards are presented to select individuals and organizations that exemplify care, kindness, and compassion for their neighbors. Through their servant leadership, they act as a model for others to follow and emulate.

Under the leadership of the Marcil family, Forum Communications and WDAY have a long history of generosity and kindness. For many years, they have been a major giver of time and talent, both professionally and personally. When asked why they stepped up to help Bell Bank host the Play It Forward event, Bill Marcil, Jr., had a simple answer: “It felt like the right thing to do.”

AWARD LANGUAGE

For artfully shining a light on our community’s biggest challenges and crises and the charities and citizens working to solve them. Your leadership and promotion of the Play It Forward charity golf event was a godsend for frontline workers, charities, and organizations during the COVID-19 pandemic. Your Giving Hearts serve as a model of kindness for others to follow.
GIVING HEARTS AWARDS 2020

Giving Hearts Awards are presented to select individuals and organizations that exemplify care, kindness, and compassion for their neighbors. Through their servant leadership, they act as a model for others to follow and emulate.

ROB AND LEANNE JORDAHL

For many years, DMF has experienced firsthand the numerous good works of Rob and Leanne Jordahl. They have been involved in many efforts to do good for those in need, particularly underserved children. Most recently, in the middle of a pandemic, they made a significant gift to the Foundation on behalf of frontline charities. Their record of giving is tremendous, and our community is a much better place because of these champions of charity.

AWARD LANGUAGE

For your many years of dedication to Dakota Medical Foundation and building health and quality of life in our region, your unwavering commitment to give back to the people of this community, and your steadfast determination to go above and beyond for children. Your Giving Hearts serve as a model of kindness for others to follow.
REMEMBERING
DR. E.P. “DIT” WENZ
Sept. 30, 1925 - Dec. 23, 2020

As one of the founders of Dakota Medical Foundation, Dr. Wenz was a true pioneer in regional healthcare.

It took a forward-thinking, pioneering team to establish DMF in the early 1960s. The group of physicians and leaders that built and operated Dakota Hospital fashioned an original approach to improving community wellness. The last of those visionaries passed away in the final days of the whirlwind that was 2020.

Dr. E.P. “Dit” Wenz is known for his many contributions to the medical field. His expertise was dedicated to many notable organizations including North Dakota State University; UND Medical School; and, for 25 years, Dakota Clinic and Dakota Hospital in Fargo. His career was distinguished by many accomplishments and pioneering procedures.

Dr. Wenz’s philanthropic influence helped make DMF what it is today. He had a real and lasting devotion to the Fargo community, and his commitment to improving health standards was admired by many.

Given the challenges of 2020, it seems fitting to slow down for a moment and reflect on how DMF came to be. A purposeful group advocated for a new community hospital, and it grew into a highly impactful force for health. As we move into 2021, our guiding principle will reflect that of our founding members who have gone before us: No idea is too small to spark a movement for good.