



OAKRIDGE NEIGHBORHOOD AND NEIGHBORHOOD SERVICES
BOARD MEETING AGENDA
February 18, 2026

- | | |
|---------------------------------|-----------------------|
| 1. Call to Order/ Chairs Report | Skylar Mayberry-Mayes |
| 2. Board Mission Moment | Jamie Buelt |
| 3. Approval of Consent Agenda | Skylar Mayberry-Mayes |
| a. December 2025 Board Minutes | |
| 5. CEO Update | Deidre DeJear |
| 4. Finance Committee Report | Diane Dubuisson |
| a. December Financials | Kristin Clayton |
| 5. Committee Reports | |
| a. Marketing | Carol Bodensteiner |
| b. Development | Emily LeMay |
| c. Organizational Strategy | Albert Farr |
| d. Housing & Services | Jaime Buelt |
| e. Governance Committee | Emily LeMay |
| f. Human Resources | Joyce McDanel |
| 6. Adjourn | |



Oakridge Neighborhood December Board Meeting
December 17, 2025
3 pm
Bash Events & Catering

Board Attendance:

Marcy Baker, Carol Bodensteiner, Jamie Buelt, Diana Dubuisson, Jessica Fenney, Tim Haight, Sherri Hart, Mary Johnson, Nalo Johnson, Erin Kuhl, Emily Lemay, Skylar Mayberry-Mayes, Joyce McDanel, Andrea McGuire, Matthea Smith, Mark Wiltse, Jessica Zugg,

Absent:

Albert Farr, Sharon Gaddy-Hanna, Kent Kramer, Kuuku Saah, Deidre Williams

Staff Attendance:

Deidre DeJear, Almardi Abdalla, Kristin Clayton, Bethany Davis, Will Dutchuk, Vicki Griffin, Chris Irvine, Kristin Littlejohn, Pat Palmer, Sheri Fitzpatrick

I. Call to Order/Chairs Report

- a) Skylar Mayberry-Mayes called the meeting to order at 3:12 pm

II. Consent Agenda Approval

- b) **Move:** Joyce McDanel **Second:** Andy McGuire **Status:** Passed

III. Mission Moment

Board, please mingle and get to know new board members and connect with staff during social time immediately following this meeting

IV. CEO Report

- a) All staff evaluations were completed through ADP
- b) Senior Leadership evaluations in process to be completed in January 2026
- c) Budgets are being evaluated and will be presented at the January Senior Management Retreat
- d) Employment opportunities at Oakridge
 - I. Youth VP position in 2nd stage of interviewing
 - II. 2 Housing Promotions – opened a Receptionist/Admin Assistant for Front Desk
 - III. Security Officer positions
 - IV. Teachers/ Teacher Assistant positions
- e) Committee members to remain on same committees for 2026
 - I. Signature agreements to be sent via email
- f) January 7th date for Board and Senior Staff Retreat
 - I. Invitation to be sent via email



V. Committee Reports

a. Marketing

Carol Bodensteiner

- I. All Communication Goals achieved for 2025
 - Positive Media relations
 - Podcast started
 - 1st Legislative Day
 - Lightening Sessions at Jazz, Jewels and Jeans
 - New Media Intern

b. Development

Emily LeMay

- I. Teen Tech Center Best Buy Grant completion April 2026
 - Opportunity possibilities
- II. Call to increase individual giving
 - Acorn Society to engage individuals under 50 to commit to monthly giving

c. Organizational Strategy

Albert Farr

d. Housing & Services

Jaime Buelt

- I. Housing Goal to have 5 % vacancy rate
 - Current vacancy rate at 9 % with 4 fire units included

e. Governance Committee

Emily LeMay

- I. New Board Members
 - Alex Marckmann from Athene
 - Jason Adams from Nationwide

f. Human Resources

- I. Completion of CEO Evaluation through MFS HR Solutions
- II. Completion of salary range report through MFS HR Solutions

Meeting adjourned to Jingle & Mingle Social at 4:03 pm

Reminders: Next Board Meeting - February 18, 2026, at 7:30 am - Homes of Oakridge Neighborhood



Leonard “Lenny” Bell

Vice President of Youth & Education Programs

Lenny brings more than two decades of leadership in education, youth development, and community engagement. He is a writer, educator, and community strategist known for designing youth centered programs that integrate academic achievement, creative expression, and personal development. His leadership approach is relationship driven and systems aware, grounded in the belief that young people thrive when they are supported holistically.

Prior to joining Oakridge Neighborhood, Lenny held leadership, teaching, and consulting roles across K through 12 education, higher education, and nonprofit organizations throughout Iowa. He has worked extensively with first generation students, young men of color, and emerging leaders, developing pathways that connect education to purpose, voice, and long- term opportunities. His work emphasizes mentorship, culturally responsive practice, and sustainable systems that strengthen both youth outcomes and organizational capacity.

In his role at Oakridge, Lenny will provide strategic and operational leadership across our youth initiatives and educational partnerships. His focus will include measurable impact, trust centered relationships, and strengthening long term outcomes for the young people and families we serve.

Oakridge Neighborhood Services

Balance Sheet

	Current Period 12/31/2025	Prior Period 11/30/2025	Prior Year End 12/31/2024
Current Assets			
Operating Cash	118,999.30	94,146.06	74,489.39
Designated Cash	67,973.27	79,158.29	32,821.84
Account Receivables and Pledges	3,048,092.02	3,099,046.15	3,311,509.68
Due from Affiliate Entities	39,638.32	(32,986.35)	381,799.89
Prepaid Expense	30,764.09	26,511.08	28,668.06
Special Investment Fund - GDMCF	408,178.12	400,829.73	385,703.78
Wheels of Hope CD	40,993.90	40,993.90	40,993.90
Investment - Silver Oaks	219,933.00	219,933.00	219,933.00
Investment - ONS Ventures	1,360,414.00	1,360,414.00	1,360,414.00
Total Current Assets	5,334,986.02	5,288,045.86	5,836,333.54
Other Assets			
Housing Notes Receivable, Net of Allowance	3,703,758.00	3,703,758.00	3,703,758.00
Operating Lease Right-of-Use Assets, net	44,978.00	44,978.00	44,978.00
Total Other Assets	3,748,736.00	3,748,736.00	3,748,736.00
Fixed Assets			
Fixed Assets	3,038,037.91	3,038,037.91	2,975,203.18
Less: Accumulated Depreciation	(1,979,674.51)	(1,963,980.18)	(1,790,572.94)
Total Fixed Assets	1,058,363.40	1,074,057.73	1,184,630.24
TOTAL ASSETS	10,142,085.42	10,110,839.59	10,769,699.78
Current Liabilities			
Accounts Payable	37,607.43	37,436.25	39,380.05
Accrued Expenses	221,337.10	223,201.01	223,201.01
Deferred Revenue	40,684.88	40,684.88	40,684.88
Line of Credit	320,000.00	320,000.00	320,000.00
Total Current Liabilities	619,629.41	621,322.14	623,265.94
Long Term Liabilities			
Operating Lease Liabilities	46,097.00	46,097.00	46,097.00
Notes Payable	20,893.45	17,150.45	0.00
Total Long Term Liabilities	66,990.45	63,247.45	46,097.00
TOTAL LIABILITIES	686,619.86	684,569.59	669,362.94
Net Assets	9,455,465.56	9,426,270.00	10,100,336.84
TOTAL NET ASSETS	9,455,465.56	9,426,270.00	10,100,336.84
TOTAL LIABILITIES AND NET ASSETS	10,142,085.42	10,110,839.59	10,769,699.78
BEGINNING BALANCE WITH CURRENT YEAR ADJUSTMENTS	10,100,336.84	10,100,336.84	10,354,323.02
NET SURPLUS/(DEFICIT)	(644,871.28)	(674,066.84)	(253,986.18)
ENDING NET ASSETS	9,455,465.56	9,426,270.00	10,100,336.84

Oakridge Neighborhood Services

Income Statement - Comparative Summary

	Current Period			PY Period	Current Year-to-Date			Annual Bdgt	Prior YTD
	Actual 12/31/2025	Budget	Change Inc/(dec)		Actual 12/31/2024	Actual 12/31/2025	Change Inc/(dec)		
REVENUE									
Rental Income	5,985.27	6,393.00	(407.73)	6,362.93	76,223.24	76,720.00	(496.76)	76,720.00	76,355.16
Contributions: Corp/Individual	174,058.78	24,000.00	150,058.78	53,657.21	238,516.70	123,150.00	115,366.70	123,150.00	150,694.74
Contributions: Board Giving	8,014.11	8,500.00	(485.89)	5,504.08	58,015.14	50,000.00	8,015.14	50,000.00	44,599.46
Grants & Subsidies	80,081.57	49,838.00	30,243.57	395,257.52	2,018,789.52	2,550,285.00	(531,495.48)	2,550,285.00	2,704,875.71
Interest & Investment Income	7,438.77	165.00	7,273.77	(2,709.85)	42,684.63	1,980.00	40,704.63	1,980.00	37,198.66
Program Fees & Tuition	46,174.28	69,682.00	(23,507.72)	56,397.79	590,294.64	736,200.00	(145,905.36)	736,200.00	479,882.19
Special Event Income	3,688.15	1,500.00	2,188.15	2,444.70	159,174.32	178,500.00	(19,325.68)	178,500.00	159,685.83
Management Fees	20,526.46	19,325.00	1,201.46	18,391.30	231,462.05	231,900.00	(437.95)	231,900.00	221,935.45
Other Income	0.00	0.00	0.00	0.00	1,831.77	0.00	1,831.77	0.00	1,355.70
TOTAL REVENUE	345,967.39	179,403.00	166,564.39	535,305.68	3,416,992.01	3,948,735.00	(531,742.99)	#####	#####
EXPENSES									
Salaries & Wages	186,597.05	192,890.00	(6,292.95)	195,072.54	2,523,997.33	2,590,100.00	(66,102.67)	2,590,100.00	2,535,179.31
Taxes & Benefits	39,315.70	44,373.00	(5,057.30)	34,332.03	511,953.39	558,325.00	(46,371.61)	558,325.00	489,393.70
Telephone & Utilities	4,040.48	5,363.00	(1,322.52)	3,831.71	63,759.46	64,360.00	(600.54)	64,360.00	58,456.34
Insurance	4,632.15	4,910.00	(277.85)	1,494.62	76,323.74	70,860.00	5,463.74	70,860.00	63,910.14
Repairs, Maintenance & Supplies	5,902.46	5,075.00	827.46	2,377.87	59,374.72	60,915.00	(1,540.28)	60,915.00	58,630.36
Program Services	27,094.48	18,858.00	8,236.48	37,175.90	224,384.73	229,825.00	(5,440.27)	229,825.00	213,408.51
Contract Services	20,924.76	16,163.00	4,761.76	20,711.07	232,636.12	219,230.00	13,406.12	219,230.00	322,069.68
Special Event Expenses	4,232.43	0.00	4,232.43	0.00	52,435.32	50,000.00	2,435.32	50,000.00	49,636.94
Marketing & Communications	1,374.25	1,431.00	(56.75)	2,146.55	38,315.72	39,060.00	(744.28)	39,060.00	35,157.30
Other General Admin	3,763.74	5,990.00	(2,226.26)	3,490.65	55,471.19	70,450.00	(14,978.81)	70,450.00	52,636.73
Audit & Tax Return Expense	3,200.00	0.00	3,200.00	0.00	34,110.00	31,350.00	2,760.00	31,350.00	34,250.00
TOTAL EXPENSES	301,077.50	295,053.00	6,024.50	300,632.94	3,872,761.72	3,984,475.00	(111,713.28)	#####	#####
CHANGE IN NET ASSETS BEFORE DEPRECIATION	44,889.89	(115,650.00)	160,539.89	234,672.74	(455,769.71)	(35,740.00)	(420,029.71)	(35,740.00)	(36,146.11)
Depreciation	(15,694.33)	0.00	(15,694.33)	(19,648.43)	(189,101.57)	0.00	(189,101.57)	0.00	(217,840.07)
CHANGE IN NET ASSETS - DEPRECIATION	(15,694.33)	0.00	(15,694.33)	(19,648.43)	(189,101.57)	0.00	(189,101.57)	0.00	(217,840.07)
NET SURPLUS (DEFICIT)	29,195.56	(115,650.00)	144,845.56	215,024.31	(644,871.28)	(35,740.00)	(609,131.28)	(35,740.00)	(253,986.18)

Oakridge Neighborhood Assoc LP

Balance Sheet HUD

	Current Period 12/31/2025	Prior Period 11/30/2025	Prior Year End 12/31/2024
Current Assets			
Cash in Bank	703,986.43	176,184.07	80,449.10
Account Receivables	52,552.48	87,461.06	51,450.68
Prepaid Expense	32,293.55	31,379.26	25,570.75
Total Current Assets	788,832.46	295,024.39	157,470.53
Other Assets			
Real Estate Tax Escrow	188,483.88	174,055.28	120,952.36
Reserve for Replacement	684,350.01	670,059.56	570,022.35
Operating Reserves	450,000.00	1,162,339.31	959,551.93
Revenue Deficit Reserves	310,958.07	147,410.26	144,230.02
Deferred Loan & Compliance Fees	24,386.13	25,063.46	32,514.09
Total Other Assets	1,658,178.09	2,178,927.87	1,827,270.75
Fixed Assets			
Fixed Assets	15,774,908.53	15,694,430.97	15,439,645.61
Less: Accumulated Depreciation	(11,690,657.06)	(11,678,469.44)	(11,275,056.78)
Total Fixed Assets	4,084,251.47	4,015,961.53	4,164,588.83
TOTAL ASSETS	6,531,262.02	6,489,913.79	6,149,330.11
Current Liabilities			
Accounts Payable	18,470.93	42,940.77	43,660.66
Due to ONS	11,747.61	(24,678.46)	281,794.52
Accrued Expenses	1,638,148.26	1,669,378.50	1,532,252.26
Tenant Security Deposits	37,473.00	39,433.00	40,310.00
Total Current Liabilities	1,705,839.80	1,727,073.81	1,898,017.44
Long Term Liabilities			
Flex Subsidy Loans	1,152,416.34	1,151,494.60	1,141,355.46
Notes Payable	6,363,513.81	6,333,388.65	5,462,502.70
Total Long Term Liabilities	7,515,930.15	7,484,883.25	6,603,858.16
TOTAL LIABILITIES	9,221,769.95	9,211,957.06	8,501,875.60
General Partner Capital - Newbury	(1,451,026.68)	(1,451,026.68)	(1,451,025.07)
General Partner Capital - ONS	(771,700.81)	(771,700.81)	(771,699.20)
Syndication Fees	(129,818.00)	(129,818.00)	(129,818.00)
Net Assets	(337,962.44)	(369,497.78)	(3.22)
TOTAL NET ASSETS	(2,690,507.93)	(2,722,043.27)	(2,352,545.49)
TOTAL LIABILITIES AND NET ASSETS	6,531,262.02	6,489,913.79	6,149,330.11

Oakridge Neighborhood Assoc LP

Income Statement - Comparative Summary

	Current Period			PY Period Actual 12/31/2024	Current Year-to-Date			Annual Bdgt 2025	Prior YTD Actual 12/31/2024
	Actual 12/31/2025	Budget	Change Inc/(dec)		Actual 12/31/2025	Budget	Change Inc/(dec)		
REVENUE									
Tenant Rent Revenue	89,157.34	56,847.00	32,310.34	158,288.00	577,204.34	623,095.00	(45,890.66)	623,095.00	687,314.00
HUD Rent Subsidy	109,978.00	94,310.00	15,668.00	95,506.00	1,237,156.00	1,131,715.00	105,441.00	1,131,715.00	1,056,533.00
Interest & Investment Income	12,117.36	9,368.00	2,749.36	11,012.18	65,957.78	65,620.00	337.78	65,620.00	75,534.08
Other Income	45,373.08	0.00	45,373.08	80.00	121,399.83	0.00	121,399.83	0.00	8,202.84
TOTAL REVENUE	256,625.78	160,525.00	96,100.78	264,886.18	2,001,717.95	1,820,430.00	181,287.95	1,820,430.00	1,827,583.92
EXPENSES									
Salaries & Wages	43,405.12	43,141.00	264.12	42,074.19	546,054.44	560,825.00	(14,770.56)	560,825.00	503,048.55
Taxes & Benefits	10,549.70	12,807.00	(2,257.30)	9,209.71	129,602.65	157,535.00	(27,932.35)	157,535.00	121,146.82
Rent Expense	2,482.00	2,482.00	0.00	2,482.00	29,784.00	29,784.00	0.00	29,784.00	29,784.00
Communications & Utilities	13,293.70	16,445.00	(3,151.30)	11,733.48	160,126.23	198,320.00	(38,193.77)	198,320.00	182,778.32
Insurance	11,573.53	11,329.00	244.53	8,886.36	159,022.92	134,660.00	24,362.92	134,660.00	121,156.15
Real Estate Taxes	165.23	7,650.00	(7,484.77)	(6,521.63)	84,315.23	91,800.00	(7,484.77)	91,800.00	91,378.37
Office & Security Supplies	794.07	1,595.00	(800.93)	804.11	18,492.26	18,635.00	(142.74)	18,635.00	10,664.02
Maintenance, Supplies & Repairs	13,090.38	16,142.00	(3,051.62)	13,755.06	271,327.73	216,720.00	54,607.73	216,720.00	237,215.27
Professional/Contract Services	18,526.51	21,256.00	(2,729.49)	26,547.71	230,815.98	259,165.00	(28,349.02)	259,165.00	406,008.56
Other Admin Expense	83,135.22	399.00	82,736.22	206,916.44	88,700.21	11,600.00	77,100.21	11,600.00	217,201.17
Audit Expense	0.00	7,500.00	(7,500.00)	7,500.00	13,475.00	14,100.00	(625.00)	14,100.00	20,600.00
Interest Expense	2,987.04	3,210.00	(222.96)	3,265.44	37,559.62	38,520.00	(960.38)	38,520.00	38,462.69
TOTAL EXPENSES	200,002.50	143,956.00	56,046.50	326,652.87	1,769,276.27	1,731,664.00	37,612.27	1,731,664.00	1,979,443.92
CHANGE IN NET ASSETS BEFORE DEPRECIATION	56,623.28	16,569.00	40,054.28	(61,766.69)	232,441.68	88,766.00	143,675.68	88,766.00	(151,860.00)
NON-OPERATING EXPENSES									
Depreciation Expense	(12,187.62)	(65,834.00)	53,646.38	(65,715.61)	(415,600.28)	(790,000.00)	374,399.72	(790,000.00)	(789,763.58)
Interest Expense	(12,900.32)	(12,387.00)	(513.32)	(12,383.97)	(154,803.84)	(148,640.00)	(6,163.84)	(148,640.00)	(148,607.64)
	(25,087.94)	(78,221.00)	53,133.06	(78,099.58)	(570,404.12)	(938,640.00)	368,235.88	(938,640.00)	(938,371.22)
CHANGE IN NET ASSETS - DEPRECIATION	(25,087.94)	(78,221.00)	53,133.06	(78,099.58)	(570,404.12)	(938,640.00)	368,235.88	(938,640.00)	(938,371.22)
NET SURPLUS (DEFICIT)	31,535.34	(61,652.00)	93,187.34	(139,866.27)	(337,962.44)	(849,874.00)	511,911.56	(849,874.00)	(1,090,231.22)

Vacancies 18 12%
 3 Efficiency; 6 Two Bedrooms; 7 Three Bedrooms; 2 Four Bedrooms

Oakridge Neighborhood Assoc Phase II LP

Balance Sheet HUD

	Current Period 12/31/2025	Prior Period 11/30/2025	Prior Year End 12/31/2024
Current Assets			
Cash in Bank	954,239.10	139,718.57	83,441.86
Account Receivables	15,840.00	38,841.58	10,105.97
Prepaid Expense	32,293.55	31,379.25	25,570.75
Total Current Assets	1,002,372.65	209,939.40	119,118.58
Other Assets			
Real Estate Tax Escrow	205,964.00	194,075.24	117,638.98
Reserve for Replacement	608,204.69	594,680.18	496,966.50
Operating Reserves	450,000.00	1,261,868.36	888,914.78
Revenue Deficit Reserves	300,968.25	300,875.13	294,229.25
Deferred Loan & Compliance Fees	23,280.52	23,927.23	31,041.04
Total Other Assets	1,588,417.46	2,375,426.14	1,828,790.55
Fixed Assets			
Fixed Assets	15,968,079.10	15,970,437.54	15,706,602.18
Less: Accumulated Depreciation	(11,906,688.08)	(11,892,689.15)	(11,424,420.21)
Total Fixed Assets	4,061,391.02	4,077,748.39	4,282,181.97
TOTAL ASSETS	6,652,181.13	6,663,113.93	6,230,091.10
Current Liabilities			
Accounts Payable	20,854.39	55,838.61	47,721.05
Due to ONS	12,396.03	(25,416.19)	80,490.13
Accrued Expenses	2,288,011.86	2,316,538.03	2,122,358.09
Tenant Security Deposits	40,299.00	39,458.00	41,698.00
Total Current Liabilities	2,361,561.28	2,386,418.45	2,292,267.27
Long Term Liabilities			
Flex Subsidy Loans	1,349,735.88	1,348,646.63	1,336,664.88
Notes Payable	6,418,988.07	6,455,359.45	5,587,340.82
Total Long Term Liabilities	7,768,723.95	7,804,006.08	6,924,005.70
TOTAL LIABILITIES	10,130,285.23	10,190,424.53	9,216,272.97
General Partner Capital - Newbury	(1,783,499.16)	(1,783,499.16)	(1,783,499.23)
General Partner Capital - ONS	(1,102,610.71)	(1,102,610.71)	(1,102,610.77)
Syndication Fees	(100,072.00)	(100,072.00)	(100,072.00)
Net Assets	(491,922.23)	(541,128.73)	0.13
TOTAL NET ASSETS	(3,478,104.10)	(3,527,310.60)	(2,986,181.87)
TOTAL LIABILITIES AND NET ASSETS	6,652,181.13	6,663,113.93	6,230,091.10

Oakridge Neighborhood Assoc Phase II LP

Income Statement - Comparative Summary

	Current Period			PY Period Actual 12/31/2024	Current Year-to-Date			Annual Bdgt 2025	Prior YTD Actual 12/31/2024
	Actual 12/31/2025	Budget	Change Inc/(dec)		Actual 12/31/2025	Budget	Change Inc/(dec)		
REVENUE									
Tenant Rent Revenue	36,100.56	54,199.00	(18,098.44)	47,353.00	527,748.56	639,350.00	(111,601.44)	639,350.00	568,252.00
HUD Rent Subsidy	119,606.00	93,831.00	25,775.00	90,038.00	1,206,176.00	1,125,985.00	80,191.00	1,125,985.00	1,120,974.00
Interest & Investment Income	12,274.60	10,268.00	2,006.60	10,268.08	69,598.76	71,235.00	(1,636.24)	71,235.00	75,394.80
Other Income	43,413.70	0.00	43,413.70	2,510.00	47,202.06	0.00	47,202.06	0.00	12,134.39
TOTAL REVENUE	211,394.86	158,298.00	53,096.86	150,169.08	1,850,725.38	1,836,570.00	14,155.38	1,836,570.00	1,776,755.19
EXPENSES									
Salaries & Wages	46,051.63	44,048.00	2,003.63	42,290.33	558,577.84	572,625.00	(14,047.16)	572,625.00	511,497.78
Taxes & Benefits	10,819.41	13,082.00	(2,262.59)	9,572.20	133,139.49	161,160.00	(28,020.51)	161,160.00	125,272.57
Rent Expense	2,482.00	2,482.00	0.00	2,482.00	29,784.00	29,784.00	0.00	29,784.00	29,784.00
Communications & Utilities	13,264.52	14,350.00	(1,085.48)	12,274.07	171,072.91	172,325.00	(1,252.09)	172,325.00	158,686.01
Insurance	11,573.53	11,330.00	243.53	8,886.36	159,022.89	134,665.00	24,357.89	134,665.00	121,156.15
Real Estate Taxes	(2,374.63)	3,190.00	(5,564.63)	(33,274.03)	32,715.37	38,280.00	(5,564.63)	38,280.00	37,950.97
Office & Security Supplies	1,139.39	1,431.00	(291.61)	1,018.07	19,941.02	17,990.00	1,951.02	17,990.00	12,194.43
Maintenance, Supplies & Repairs	9,689.89	12,817.00	(3,127.11)	15,947.99	235,029.57	176,800.00	58,229.57	176,800.00	282,794.92
Professional/Contract Services	18,298.06	21,249.00	(2,950.94)	36,860.60	233,967.96	259,105.00	(25,137.04)	259,105.00	407,117.04
Other Admin Expense	16,341.72	499.00	15,842.72	50,390.64	19,672.72	12,800.00	6,872.72	12,800.00	59,215.18
Audit Expense	0.00	7,500.00	(7,500.00)	6,300.00	14,675.00	14,100.00	575.00	14,100.00	20,400.00
Interest Expense	3,125.61	3,401.00	(275.39)	3,228.00	39,165.71	40,815.00	(1,649.29)	40,815.00	40,259.20
TOTAL EXPENSES	130,411.13	135,379.00	(4,967.87)	155,976.23	1,646,764.48	1,630,449.00	16,315.48	1,630,449.00	1,806,328.25
CHANGE IN NET ASSETS BEFORE DEPRECIATION	80,983.73	22,919.00	58,064.73	(5,807.15)	203,960.90	206,121.00	(2,160.10)	206,121.00	(29,573.06)
NON-OPERATING EXPENSES									
Depreciation Expense	(13,998.93)	(67,667.00)	53,668.07	(67,485.42)	(482,267.87)	(812,000.00)	329,732.13	(812,000.00)	(811,099.21)
Interest Expense	(17,778.30)	(17,215.00)	(563.30)	(11,494.70)	(213,615.26)	(206,575.00)	(7,040.26)	(206,575.00)	(198,977.60)
	(31,777.23)	(84,882.00)	53,104.77	(78,980.12)	(695,883.13)	(1,018,575.00)	322,691.87	(1,018,575.00)	(1,010,076.81)
CHANGE IN NET ASSETS - DEPRECIATION	(31,777.23)	(84,882.00)	53,104.77	(78,980.12)	(695,883.13)	(1,018,575.00)	322,691.87	(1,018,575.00)	(1,010,076.81)
NET SURPLUS (DEFICIT)	49,206.50	(61,963.00)	111,169.50	(84,787.27)	(491,922.23)	(812,454.00)	320,531.77	(812,454.00)	(1,039,649.87)

Vacancies 14 9%

1 Efficiency; 6 Two Bedrooms; 6 Three Bedrooms; 1 Four Bedrooms

Silver Oaks Associates, LP

Balance Sheet HUD

	Current Period 12/31/2025	Prior Period 11/30/2025	Prior Year End 12/31/2024
Current Assets			
Cash in Bank	19,418.10	30,847.18	39,209.99
Account Receivables	695.63	3,135.01	1,087.29
Prepaid Expense	10,819.60	10,779.43	8,456.37
Total Current Assets	30,933.33	44,761.62	48,753.65
Other Assets			
Reserve for Replacement	137,843.13	136,462.67	122,781.52
Operating Reserves	133,317.25	133,287.12	132,984.41
Deferred Loan & Compliance Fees	18,154.79	18,239.23	19,168.07
Total Other Assets	289,315.17	287,989.02	274,934.00
Fixed Assets			
Fixed Assets	6,609,465.86	6,609,465.86	6,609,465.86
Less: Accumulated Depreciation	(2,512,751.66)	(2,496,262.05)	(2,314,540.61)
Total Fixed Assets	4,096,714.20	4,113,203.81	4,294,925.25
TOTAL ASSETS	4,416,962.70	4,445,954.45	4,618,612.90
Current Liabilities			
Accounts Payable	5,608.22	6,527.15	7,316.03
Due to ONS	2,800.68	4,414.30	6,821.24
Accrued Expenses	169,090.07	163,954.11	155,195.91
Tenant Security Deposits	8,200.00	8,400.00	8,200.00
Total Current Liabilities	185,698.97	183,295.56	177,533.18
Long Term Liabilities			
Notes Payable	862,509.27	863,454.94	874,349.81
Total Long Term Liabilities	862,509.27	863,454.94	874,349.81
TOTAL LIABILITIES	1,048,208.24	1,046,750.50	1,051,882.99
Limited Partner Capital - NEF	3,383,331.00	3,383,331.00	3,383,331.00
General Partner Capital - Newbury	(55.04)	(55.04)	(55.43)
General Partner Capital - ONS	219,933.95	219,933.95	219,933.57
Syndication Fees	(36,480.00)	(36,480.00)	(36,480.00)
Net Assets	(197,975.45)	(167,525.96)	0.77
TOTAL NET ASSETS	3,368,754.46	3,399,203.95	3,566,729.91
TOTAL LIABILITIES AND NET ASSETS	4,416,962.70	4,445,954.45	4,618,612.90

Silver Oaks Associates, LP

Income Statement - Comparative Summary

	Current Period			PY Period Actual 12/31/2024	Current Year-to-Date			Annual Bdg't 2025	Prior YTD Actual 12/31/2024
	Actual 12/31/2025	Budget	Change Inc/(dec)		Actual 12/31/2025	Budget	Change Inc/(dec)		
REVENUE									
Tenant Rent Revenue	26,516.32	30,182.00	(3,665.68)	27,570.00	352,926.32	353,440.00	(513.68)	353,440.00	332,248.00
Interest & Investment Income	62.87	195.00	(132.13)	57.42	676.53	2,300.00	(1,623.47)	2,300.00	2,057.24
Other Income	225.00	0.00	225.00	25.00	425.00	0.00	425.00	0.00	225.00
TOTAL REVENUE	26,804.19	30,377.00	(3,572.81)	27,652.42	354,027.85	355,740.00	(1,712.15)	355,740.00	334,530.24
EXPENSES									
Salaries & Wages	6,152.57	4,965.00	1,187.57	4,211.10	64,413.33	64,510.00	(96.67)	64,510.00	63,043.97
Taxes & Benefits	1,414.31	1,378.00	36.31	1,284.31	16,862.56	16,965.00	(102.44)	16,965.00	15,920.15
Rent Expense	1,021.27	1,028.00	(6.73)	998.93	12,255.24	12,335.00	(79.76)	12,335.00	11,987.16
Communications & Utilities	5,009.97	5,390.00	(380.03)	5,283.39	73,696.16	65,165.00	8,531.16	65,165.00	62,598.26
Insurance	4,221.33	3,499.00	722.33	3,086.07	50,817.98	41,640.00	9,177.98	41,640.00	37,614.72
Real Estate Taxes	1,776.41	405.00	1,371.41	965.84	6,231.41	4,860.00	1,371.41	4,860.00	4,815.84
Office & Security Supplies	310.42	222.00	88.42	1,640.07	6,272.16	2,060.00	4,212.16	2,060.00	4,992.49
Maintenance, Supplies & Repairs	16,041.73	2,559.00	13,482.73	1,936.23	50,010.37	40,200.00	9,810.37	40,200.00	38,197.00
Professional/Contract Services	4,348.51	4,008.00	340.51	3,793.49	57,661.76	50,315.00	7,346.76	50,315.00	48,889.03
Other Admin Expense	220.61	250.00	(29.39)	215.34	2,708.00	3,020.00	(312.00)	3,020.00	2,915.46
Audit Expense	0.00	2,700.00	(2,700.00)	2,700.00	9,900.00	8,125.00	1,775.00	8,125.00	10,825.00
Interest Expense	84.44	85.00	(0.56)	84.44	1,013.28	1,020.00	(6.72)	1,020.00	1,013.28
TOTAL EXPENSES	40,601.57	26,489.00	14,112.57	26,199.21	351,842.25	310,215.00	41,627.25	310,215.00	302,812.36
CHANGE IN NET ASSETS BEFORE DEPRECIATION	(13,797.38)	3,888.00	(17,685.38)	1,453.21	2,185.60	45,525.00	(43,339.40)	45,525.00	31,717.88
NON-OPERATING EXPENSES									
Depreciation Expense	(16,489.61)	(18,090.00)	1,600.39	(16,545.38)	(198,211.05)	(217,075.00)	18,863.95	(217,075.00)	(198,428.11)
Interest Expense	(162.50)	(163.00)	0.50	(162.50)	(1,950.00)	(1,950.00)	0.00	(1,950.00)	(1,950.00)
	(16,652.11)	(18,253.00)	1,600.89	(16,707.88)	(200,161.05)	(219,025.00)	18,863.95	(219,025.00)	(200,378.11)
CHANGE IN NET ASSETS - DEPRECIATION	(16,652.11)	(18,253.00)	1,600.89	(16,707.88)	(200,161.05)	(219,025.00)	18,863.95	(219,025.00)	(200,378.11)
NET SURPLUS (DEFICIT)	(30,449.49)	(14,365.00)	(16,084.49)	(15,254.67)	(197,975.45)	(173,500.00)	(24,475.45)	(173,500.00)	(168,660.23)

Vacancies
One 1 Bedroom

1 3%



NEIGHBORHOOD

2026 Board and Committee Meeting Schedule

BOARD OF DIRECTORS

Skylar Mayberry-Mayes Chair

Wednesday	February 18, 2026	Oakridge Board Room	7:30 – 9:00 a.m.
Wednesday	April 15, 2026	Oakridge Board Room	7:30 – 9:00 a.m.
Wednesday	June 17, 2026	Oakridge Board Room	7:30 – 9:00 a.m.
Wednesday	August 19, 2026	Oakridge Board Room	7:30 – 9:00 a.m.
Wednesday	October 21, 2026	Oakridge Board Boom	7:30 – 9:00 a.m.
Wednesday	December 16, 2026	TBD	

EXECUTIVE COMMITTEE

Skylar Mayberry-Mayes Chair

Wednesday	February 11, 2026	Virtual	12:30 p.m.
Wednesday	March 11, 2026	Virtual	12:30 p.m.
Wednesday	April 8, 2026	Virtual	12:30 p.m.
Wednesday	May 13, 2026	Virtual	12:30 p.m.
Wednesday	June 10, 2026	Virtual	12:30 p.m.
Wednesday	July 8, 2026	Virtual	12:30 p.m.
Wednesday	August 12, 2026	Virtual	12:30 p.m.
Wednesday	September 9, 2026	Virtual	12:30 p.m.
Wednesday	October 14, 2026	Virtual	12:30 p.m.
Wednesday	November 11, 2026	Virtual	12:30 p.m.
Wednesday	December 9, 2026	Virtual	12:30 p.m.

FINANCE COMMITTEE

Diana Dubuisson, Chair

Monday	February 16, 2026	Virtual	12:00 p.m.
Monday	March 16, 2026	Virtual	12:00 p.m.
Monday	April 13, 2026	Virtual	12:00 p.m.
Monday	May 18, 2026	Virtual	12:00 p.m.
Monday	June 15, 2026	Virtual	12:00 p.m.
Monday	July 20, 2026	Virtual	12:00 p.m.
Monday	August 17, 2026	Virtual	12:00 p.m.
Monday	September 21, 2026	Virtual	12:00 p.m.
Monday	October 19, 2026	Virtual	12:00 p.m.
Monday	November 16, 2026	Virtual	12:00 p.m.
Monday	December 14, 2026	Virtual	12:00 p.m.

ORGANIZATIONAL STRATEGY

Albert Farr, Chair

Wednesday	February 4, 2026	Virtual	8:00 a.m.
Wednesday	April 1, 2026	Virtual	8:00 a.m.
Wednesday	June 3, 2026	Virtual	8:00 a.m.
Wednesday	August 5, 2026	Virtual	8:00 a.m.
Wednesday	October 7, 2026	Virtual	8:00 a.m.
Wednesday	December 2, 2026	Virtual	8:00 a.m.

HOUSING AND SERVICE

Jaime Buelt, Chair

Friday	February 13, 2026	Virtual	12:00 p.m.
Friday	April 10, 2026	Virtual	12:00 p.m.
Friday	June 12, 2026	Virtual	12:00 p.m.
Friday	August 14, 2026	Virtual	12:00 p.m.
Friday	October 9, 2026	Virtual	12:00 p.m.
Friday	December 11, 2026	Virtual	12:00 p.m.

HUMAN RESOURCES

Joyce McDanel, Chair

Friday	March 27, 2026	Virtual	10:00 a.m.
Friday	May 22, 2026	Virtual	10:00 a.m.
Friday	August 28, 2026	Virtual	10:00 a.m.
Friday	October 23, 2026	Virtual	10:00 a.m.
Friday	December 18, 2026	Virtual	10:00 a.m.

GOVERNANCE

Emily Lemay Chair

Friday	February 13, 2026	Virtual	11:00 a.m.
Friday	April 10, 2026	Virtual	11:00 a.m.
Friday	June 12, 2026	Virtual	11:00 a.m.
Friday	August 14, 2026	Virtual	11:00 a.m.
Friday	October 9, 2026	Virtual	11:00 a.m.
Friday	December 11, 2026	Virtual	11:00 a.m.

MARKETING

Carol Bodensteiner, Chair

Wednesday	February 11, 2026	Virtual	8:00 a.m.
Wednesday	April 8, 2026	Virtual	8:00 a.m.
Wednesday	June 10, 2026	Virtual	8:00 a.m.
Wednesday	August 12, 2026	Virtual	8:00 a.m.
Wednesday	October 14, 2026	Virtual	8:00 a.m.
Wednesday	December 9, 2026	Virtual	8:00 a.m.

DEVELOPMENT

Emily Lemay Chair

Friday	February 13, 2026	Virtual	10:00 a.m.
Friday	April 10, 2026	Virtual	10:00 a.m.
Friday	June 12, 2026	Virtual	10:00 a.m.
Friday	August 14, 2026	Virtual	10:00 a.m.
Friday	October 9, 2026	Virtual	10:00 a.m.
Friday	December 11, 2026	Virtual	10:00 a.m.

2026 ON and ONS Committees

EXECUTIVE COMMITTEE	2 nd Wednesday of every month at 12:30 p.m.
NAME	POSITION
Mayberry Mayes	Board President
Lemay	Vice President – Governance & Development
Dubuisson	Treasurer – Finance Chair
Buelt	Secretary - Housing/Services Chair
McDanel	HR Chair
Bodensteiner	Marketing Chair
Farr	Organizational Strategy Chair
Staff	DeJear, Fitzpatrick

FINANCE COMMITTEE	3 rd Monday of every month at noon except April & December
NAME	POSITION
Dubuisson	Treasurer – Chair
Kuhl	Board
Baker	Board
Kramer	Board
Saah	Board
Wiltse	Board
Zaugg	Board
Schissel	Community
Kruse	Community
Staff	Clayton

HUMAN RESOURCES COMMITTEE	4 th Friday 10 am March, May, August & October December date 12/11 at 10 a.m.
NAME	POSITION
McDanel	Chair
Gaddy Hanna	Board
M Johnson	Board
Haight	Board
Williams	Board
Hart	Board
Staff	DeJear, Fitzpatrick

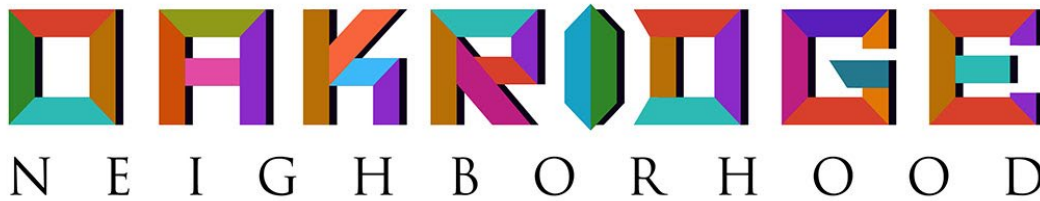
MARKETING COMMITTEE	2 nd Wednesday 8-9 am – prior to Board meeting
NAME	POSITION
Bodensteiner	Chair
Farr	Board
Adams	Board
Sara Opie	Community
Sara Welch	Community
Staff	Irvine

DEVELOPMENT	2 nd Friday at 10 a.m. – prior to Board meeting
NAME	POSITION
Lemay	Chair
Feeney	Board
Wanamaker	Community
Sieman	Community
Daniel	Community
Wong	Community
Holub	Community
McNeal	Community
Staff	Littlejohn

HOUSING AND SERVICES COMMITTEE	2 nd Friday at noon prior to Board Meetings
NAME	POSITION
Buelt	Chair
Bodensteiner	Board
Nalo Johnson	Board
Saah	Board
M Johnson	Board
Smith	Board
Zaugg	Board
Adams	Board
Markmann	Board
Staff	DeJear, Abdalla, Palmer, Davis

GOVERNANCE COMMITTEE	2 nd Friday at 11 a.m. - prior to Board meeting
NAME	POSITION
Lemay	Chair
Gaddy-Hanna	Board
Dubuisson	Board
Baker	Board
Kramer	Board
Buelt	Board
Smith	Board
Staff	DeJear, Fitzpatrick

ORGANIZATIONAL STRATEGY COMMITTEE	1 st Wednesday at 8 a.m. prior to Board meeting
NAME	POSITION
Farr	Chair
Williams	Board
Feeney	Board
Haight	Board
Kuhl	Board
Mayberry-Mayes	Board
Nalo Johnson	Board
Hart	Board
Marckmann	Board
Staff	DeJear



Communications Update

12/4/25 – 2/9/26

Earned Media

- Developed and distributed news release highlighting grant from Polk County allowing energy efficient upgrades
- Facilitated interview with Deidre DeJear and WE ARE IOWA 5 grant from Polk County allowing energy efficient upgrades
- Pitched Oak Studio story to Des Moines Register, arranged multiple interviews; reporter had to pause due to personal situation
- Pitched Deidre DeJear for “one year in the CEO’s chair” to Des Moines Business Record
- Submitted Oak Society photos to dsm magazine
- Developed and distributed news release on new board members
- Fielded media call on Oak Academy and if they were seeing daycare illness spike
- Pitched and scheduled deskside visit with new news director of WE ARE IOWA 5

Paid Media

- Facilitated creative for Business Record and dsm website ads
- Facilitated creative for Business Record Giving Back ad running 2/20/26

Shared Media

- Daily social media channel monitoring, response and engagement, plus invitations to potential new followers
- Organic and paid social media content development and post sharing on topics including: new board members, Oak Academy events, resident and client success stories, year-end

giving, Silver Oaks holiday event, youth involvement in The Nutcracker, Slumberland bed donation, etc.

- Facebook, Instagram, Twitter (paused), LinkedIn, YouTube – Oakridge Neighborhood; Facebook, Instagram – Oak Academy; Facebook employee page

Owned Media

- Developed overview of mixed used development proposal for Board of Directors
- Developed and distributed December, January and one special edition external newsletter
- Developed and distributed January and February employee newsletters
- Developed and distributed December and January resident newsletters
- Developed Oak Academy brochure copy, facilitated production
- Photo shoots for four subjects who are focus of upcoming stories and ads
- Oversaw development of video with additional subject who is focus of upcoming stories and ads
- Developed multiple success stories featuring board member, residents and clients and highlighting Oakridge Neighborhood programming; utilized AI for efficiencies
- Developed creative for Development's year-end letter to potential donors
- Facilitated various refinements and content additions to website
- Developed letterhead for Development use featuring board leadership
- Updated and distributed Oakridge Neighborhood Brand Standards to senior management team
- Facilitating all details of Employee of Month program
- Updated Oakridge Neighborhood historical chronology document
- Developed misc. graphics and flyers for newsletters, social, and departmental use, including on employee benefits, monthly giving, WIC, why to nominate someone for Employee of the Month, programming calendars, office closings, etc.
- Asset curation including, youth programming, Oak Academy activities, donations, Silver Oaks, staff events, etc.

Events/Presentations

- Developed Oak Society communications; completing tactics, including news release; submission to community calendars; social media promotion; invitation; script, etc.

- Developed and implemented plan to publicize Enrollment Saturday event for Oak Academy
- Outlined and implementing all deliverables for Oakridge Neighborhood legislative day, including invitation, rentals, food, key messages, updated rack card, etc.
- Facilitated Deidre DeJear presentation at Urbandale United Church of Christ
- Facilitated Poetry Palooza workshop with youth programming

Additional

- Developed 2026 Communications Plan
- Set 2026 Communications goals
- Onboarding Communications and Marketing Coordinator
- Developed Acorn Society website content and recruitment letter
- Facilitated Toys for Tots effort for Oakridge Neighborhood
- Met with representatives of Urbandale United Church of Christ; interest in developing ongoing partnership in support of Oakridge

Community Relations

- Al Éxito! – board of directors
- The Consortium professional business organization – president, executive committee

Results

Earned Media *(note: many news stories noted can additionally be found in media online and social channels, further maximizing exposure)*

- “Building Opportunities,” Polk County Housing Trust Fund 2025 report to the community, 12/25
- “Oakridge Neighborhood names Sister Margaret Toomey 2025 Oak Society Honoree,” Fearless, 12/8/25
- “Oakridge honoree,” dsm Weekly, 12/10/25
- “Polk County allocates funds to upgrade Oakridge Neighborhood,” Business Record Daily, 12/16/25
- “Polk County is allocating \$1.7 million...” Axios Des Moines, 12/17/25

- “Nearly \$2 million in upgrades coming to Oakridge Neighborhood,” WE ARE IOWA 5, 12/18/25
- “Nearly \$2 million in upgrades coming to Oakridge Neighborhood,” YouTube, 12/18/25
- “Nearly \$2 million in upgrades coming to Oakridge Neighborhood,” WE ARE IOWA 5, 12/19/25
- “Multiple organizations come together for turkey giveaway in Oakridge Neighborhood,” WE ARE IOWA 5, 12/21/25
- “Multiple organizations come together for turkey giveaway in Oakridge Neighborhood,” YouTube, 12/21/25
- “Most Influential Business Leaders,” Business Record Book of Lists, 1/26
- “Breakfast at Tiffany’s,” Business Record Book of Lists, 1/26
- “Nonprofit Organizations,” Business Record Book of Lists, 1/26
- “Most Influential Business Leaders & Nonprofits,” Des Moines Business Record, 1/9/26
- “2026 Most Influential Leaders list,” Business Record Daily, 1/12/26
- “Greater Des Moines CEO Master Class,” Des Moines Business Record, 1/30/26
- “Learn what the 2025 Changemakers are excited for in 2026,” Business Record Daily, 1/30/26

Paid Media

- “Where children achieve. Families thrive. Prosperity is created.” businessrecord.com, 10/1/25 – 9/30/26
- “Where children achieve. Families thrive. Prosperity is created.” dsmmagazine.com, 10/1/25 – 9/30/26
- “Secure Housing. Supportive Services. Strong Community.” dsm email blast (highlighting Dalia’s story), 12/3/25
 - Emails sent: 6,593
 - Total opens: 3,832
 - Click thrus: 13
- “Secure Housing. Supportive Services. Strong Community.” Business Record Daily, 12/3/25
- “Secure Housing. Supportive Services. Strong Community.” Business Record Daily, 12/10/25
- “Secure Housing. Supportive Services. Strong Community.” Business Record Daily, 12/17/25

- “Meet Abubaker...” Facebook, 6,608 views, 4,015 reach, 587 post engagement, \$49.96, 12/22/25 – 12/26/25
- “Secure Housing. Supportive Services. Strong Community.” Business Record Daily, 12/31/25
- “Where Children Achieve. Families Thrive. Prosperity is Created.” Business Record Book of Lists, 1/26
- Oak Academy Enrollment Saturday, Facebook, 11,073 views, 5,676 reach, 204 post engagement, \$60, 1/5/26 – 1/10/26
- “Secure Housing. Supportive Services. Strong Community.” Business Record Daily, 1/21/26
- “Secure Housing. Supportive Services. Strong Community.” Business Record Daily, 1/22/26
- “Secure Housing. Supportive Services. Strong Community.” Business Record Daily AM, 1/23/26
- “Secure Housing. Supportive Services. Strong Community.” Business Record Daily PM, 1/23/26
- “Secure Housing. Supportive Services. Strong Community.” Business Record Daily, 1/28/26
- “Secure Housing. Supportive Services. Strong Community.” Business Record Daily, 1/29/26

Owned Media

- External Newsletter
 - Audience 1,411, **down 15** from 1,426 since 12/3/25
 - Open rate/external newsletters sent during this period: 47.1, 42.6, 36
- Giving Links (11/21/25 – 12/31/25)
 - OakDSM.link/Give used with socials – 61 clicks
 - OakDSM.link/DD-Give25 used with Deidre DeJear efforts – 49 clicks
 - OakDSM.link/Giving25 used with other – 10 clicks

Shared Media

- Facebook
 - Followers 3,563, **up 126** from 3,437 since 12/3/25
- Instagram
 - Followers 1,289, **up 8** from 1,281 since 12/3/25
- LinkedIn

- Connections 1,146, **up 5** from 1,141 since 12/3/25
- YouTube
 - Channel subscribers 230, **steady** from 230 since 12/3/25

Events

- Signup Saturday: 7 families attended, all 7 registered

Anecdotal

- “Again, such a delight to read!” – internal newsletter
- “Excellent newsletter. Love the staff and resident profiles.” – internal newsletter
- “This is an amazing newsletter. I cried through it. What a heartfelt story regarding SEL, and the accompanying videos. Thank you for capturing the SEL segment...” – internal newsletter
- “Love the video of 2025 recap!” – internal newsletter
- “Everything in this issue makes me happy! Hearing the Merrill School students sing was a special treat.” – external newsletter
- “Love this issue! Thanks for all you do to share the good news and happenings at Oakridge.” – internal newsletter



2026 Communications Recommendations

1/21/26

Overview

Our Vision

~ We are the premier housing and service provider offering a stable community where children achieve, families thrive, and prosperity is created ~

Overview

- Individual and program success stories from Oakridge Neighborhood continue to resonate with key target audiences, helping foster understanding of the importance of our mission to the Central Iowa ecosystem and economy.
- Sharing these impactful messages with regularity drives awareness and strengthens the reputation of and connection to Oakridge.
- Fundraising efforts, donations, engagement and overall public support for the Oakridge mission are positively impacted by this increased awareness.
- Communications also plays an important role in supporting individual initiatives for each program area of the organization.
- There remains an opportunity to vigilantly communicate with employees, so they know “what” and understand the “why.”

Objective

- Build awareness, knowledge, familiarity of and engagement with Oakridge Neighborhood, emphasizing its rich heritage in serving Central Iowa for over 55 years.
- Lead key constituents to feel an emotional connection and to care about Oakridge Neighborhood, its residents and outcomes.
- Strengthen employee connections through communications to contribute to community, comradery and culture.
- Support organizational goals and departmental outcomes through communications initiatives.

Strategy

- Leverage positive messaging of the mission and results-driven work of Oakridge Neighborhood with consistency to further Oakridge's reputation of excellence with key constituents.
- Utilize strong calls to action to encourage contributions and participation.
- Highlight programming benefits with the community at large, residents and clients to maximize engagement.
- Emphasize individual and Central Iowa ecosystem and economic impacts to further buy-in.
- Share compelling stories from Oakridge Neighborhood and its people to bring key messages to life, foster emotional connections and drive engagement.

Strategy

- Emphasize availability of services to ALL.
- Support organizational and departmental communications.
- Communicate with cultural competency: Smart Brevity/photo heavy, stories/photos/pitches illustrating wide range of cultures, sensitivity to cultural mores with social media, respect for client trauma and life paths, etc.
- Consider the customer service experience in all initiatives.

Strategy

Storytelling Emphasis

People of Oakridge

Individual success

Program offerings

Program successes

Program availability to all

Community and individual ecosystem and economic impacts

Longevity serving community

Grantor and donor recognition

Year-end giving

Special events

Mission and strategic initiatives

#OakridgeStrong

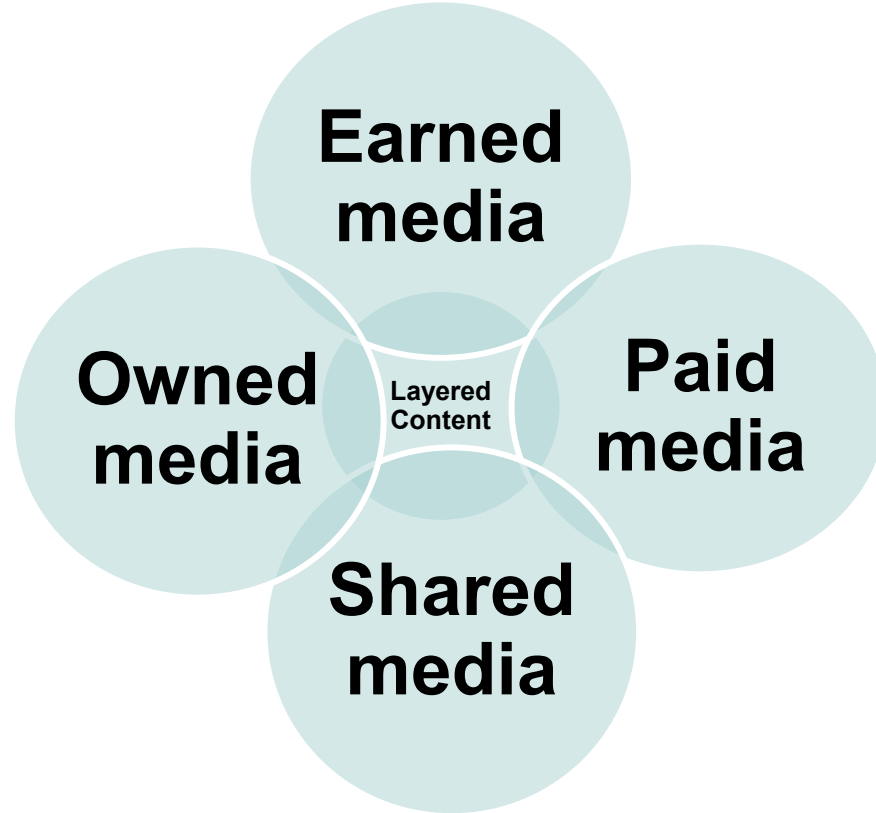
Key Audiences

- Potential and current funders and donors, sponsors
- Potential clients who would benefit from Oakridge Neighborhood services
- Oakridge stakeholders – Board, staff, volunteers, event attendees, residents – current and former
- Oakridge fans – newsletter subscribers, social media followers
- Community at large
- Media – reporters, subscribers + followers

Key Message

~ Oakridge Neighborhood ~
Where children achieve, families thrive,
and prosperity is created

Tactics

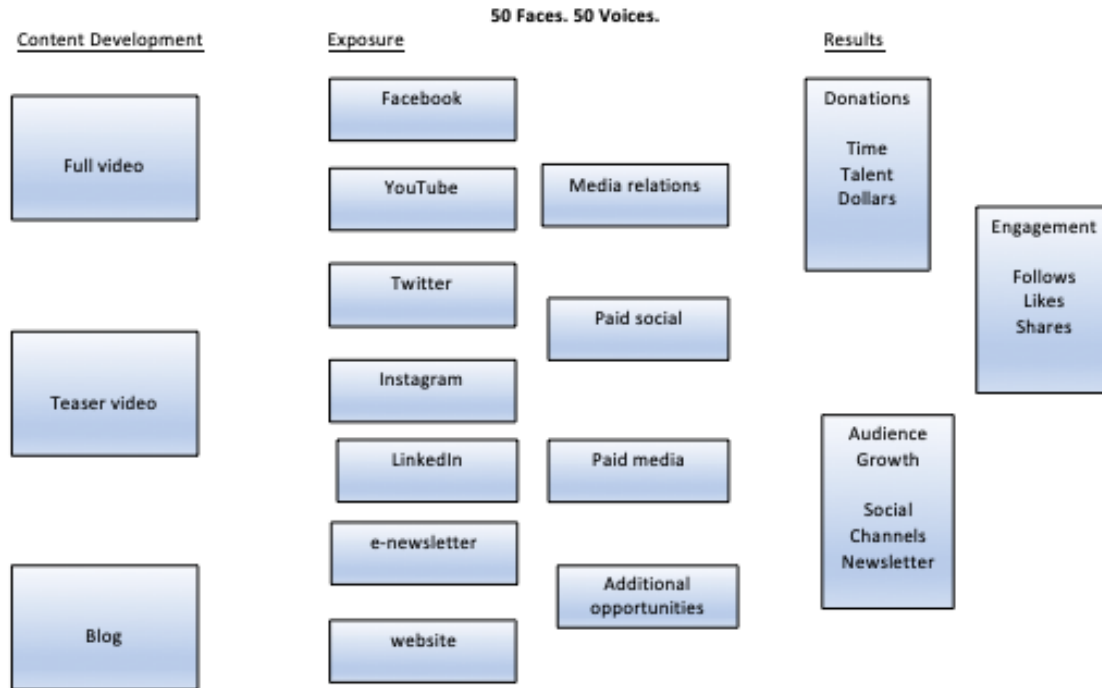


Layered Communications

Utilize varied communications channels and integrated content strategy to share coordinated messaging, regularly reaching audiences where they consume information for maximum impact and results

Layered Communications

Video Example



Earned Media

“What’s Up at Oakridge” media communique

Deskside visits/coffee meetings with key reporters/editors

Pitching (examples)

- Client successes
- Program results
- Service offerings
- Youth programming events
- Oak Academy offering
- Fundraisers
- United Way Day of Action
- Expert panelists
- 2025 Business Record editorial calendar opportunities

Earned Media

News releases

- Program successes
- Program introductions
- Student events
- Fundraising events
- Significant grants
- Key new hires
- Opportunistic

Media list refinement

Media training and prep as needed

Crisis communications manual review and update

Community nominations and recognition opportunities

Paid Media + Digital

Des Moines Business Publications (10/25 – 9/26)

- Profile and ad on dsmmagazine.com and businessrecord.com (12 months)
- dsm nonprofit profile/resource Nov/Dec issue – 2-page spread
- dsm social media profile post
- Business Record nonprofit profile/resource November 21
- BR social media profile post
- ¼ page ad in July/August issue dsm
- ¼ page ad in BR Giving Back issue February

Paid Media + Digital

Des Moines Business Publications (continued)

- ¼ page ad in Book of Lists
- Book of Lists database
- Business Record Daily 1/week for 3.5 months
- Solo email blast to dsm list
- Business Record subscription
- 2 complimentary BR ads
- Incorporate GIFs, links to website content, QR codes to donate, etc.

Google My Business management

Google Ads

Shared Media

Key Channels – Oakridge Neighborhood

- Facebook
- Instagram
- YouTube
- LinkedIn

Key Channels – Oak Academy

- Facebook
- Instagram

Shared Media

Social Media Organic

- Content – develop posts
- Curate – share content from others
- Collaborate – tag partners + stakeholders
- Connect – like, comment + follow others, emphasize engagement
- Monitor & respond – daily

Social Media Paid

- Highly targeted, custom audiences

Owned Media

Website

- Continual site content updates and refinements
- Content additions (e.g. profiles, signature fundraising events, employee portal updates)
- SEO updates
- Ongoing maintenance
- Short link - explore for emails

Newsletters

- Monthly, plus special edition single topic focused
- External, internal and resident versions
- Continue to expand newsletter audience through event registrations, donor contacts, website signups, etc.
- Transition to Blackbaud for maximum efficiencies and synergies
- Continue to incorporate Smart Brevity

Owned Media

Meeting Overviews

- Capture and share Management Team meeting notes with full staff

Videos

- Develop and implement video strategy
- Include call to action

Asset Curation

- Capture photography and video of Oakridge events, people
- Secure and collate assets from others
- Attain photo releases as needed

Owned Media

Collateral

- Annual impact report, incorporating video links in electronic version
- Fact sheet update
- Bios of management team
- Flyers
- Misc. as needed (e.g. business cards, notecards, letterhead)

Employee of Month Program

Apparel Program

Text Tool

Style Guide

- To management team annually to emphasize consistency in branding, messaging and visuals across all communications platforms

Events

Breakfast at Tiffany's | Jazz, Jewels & Jeans | Oak Society Reception

Separate plan for each to include:

- Media relations
- News releases
- Calendar announcements
- Advertising
- Key messages and/or remarks
- Social
 - Organic – Facebook, Instagram, LinkedIn
 - Paid – targeted
- Website
- Newsletters
- Follow-up communications

Departmental Communications

Support departmental priorities and communication needs

- Develop and implement tailored communication strategies as appropriate
 - e.g. Oak Academy and youth registrations
- Develop merchandising tool kit for tabling events
- Utilize organizational calendar and departmental lead 1:1s to identify needs and opportunities

Community Relations

Acorn Society

- Support through outlined deliverables

Community Presentations

- Share key messages about Oakridge Neighborhood to interested community organizations

Legislative Day

- Develop key messages, invitation, support materials, training, etc.

Represent, contribute on behalf of Oakridge

- Al Éxito - Board of Directors, Marketing Communications Committee
- Consortium Business Club – President, Executive Committee

Additional Initiatives

Explore and leverage AI capabilities for Communications and other areas of organization

Develop volunteer engagement plan to enlist engaged stakeholders

Champion "communicating with care," "lead with care" organizationally

Consider alternative channels to and creative ways for communicating with target audiences (e.g. church groups, thank you tours, special events, signage)

When funding available: replace Center Street entry signage, develop dedicated Oak Academy building signage

Tracking + Measurement

- Launch Acorn Society deliverables
- Facilitate Legislative Reception
- Media placements + sentiment
- Newsletter analytics + audience growth
- Social engagement + audience growth
- Paid social engagement metrics
- Update Crisis Communications manual
- Develop video strategy
- Incorporate AI
- Move newsletter to Blackbaud
- Champion volunteer engagement
- Onboard Communications Specialist
- Anecdotal
- Bi-monthly activity report

Thank You!





	2025 Target	2025 Actual	2026 Budget	Percent
Corporate/Foundation	\$1,625,000.00	\$1,020,600.00	\$1,022,000.00	37%
Special Events	\$300,000.00	\$154,486.17	\$157,000.00	5%
Individual Giving	\$125,000.00	\$224,735.58	\$300,000.00	11%
Year-End Giving	\$175,000.00	\$101,862.72	\$200,000.00	7%
Government Grants	\$1,225,000.00	\$698,096.61	\$1,116,000.00	40%
Total	\$3,500,000.00	\$2,199,782.08	\$2,778,000.00	100%

2026 ONS budget includes a line item for Oak Academy Program Fees & Tuition. This revenue reflects Shared Visions grant funding for Oak Academy, administered through the development department. The grant reimburses program expenses based on student enrollment levels. 2026 Estimated Revenue: \$814,750.00.

DEVELOPMENT REPORT - FEBRUARY 2026

2026 Outlook & Goals

- The fundraising environment is likely to be one of pressured stability, with demand remaining high and government dollars still unreliable, but modest growth possible through strategic private philanthropy and stronger internal capacity. Oakridge's efforts will be further challenged by the retirement of tenured development consultant, Randy McNeal, in March.
- Best practices dictate organizations with budgets above \$3 million are best positioned if they invest in a focused development team—at minimum, a senior development leader, dedicated staff for individual and institutional giving, events/annual fund, and data/operations—supported by solid CRM systems and engaged executive/board leadership.
- Success will hinge on integrated fundraising: leveraging technology and AI to work smarter, while keeping fundraisers, program leaders, and organizational storytellers closely aligned around mission and measurable outcomes.

2025 Fundraising Landscape

- Looking back on 2025, fundraising for human services organizations was difficult because three crises collided at once: inflation and higher operating costs, shrinking or disrupted government funding, and sharply rising demand for services. Donors' disposable income was squeezed by economic uncertainty and lingering inflation, which reduced overall giving capacity and made supporters more cautious.
- 33% of community-serving nonprofits experienced government funding disruptions, lost grants, or delays just as needs for housing, food, and mental health support surged, making it almost impossible for philanthropy alone to close the gap.
- Years of crisis-driven appeals produced real donor fatigue: even loyal donors gave smaller gifts, supported fewer organizations, and prioritized only the most urgent basic-needs causes, intensifying competition among human services agencies.
- Donor retention continued to erode nationally while many nonprofits lacked the staff, technology, and data systems to fully leverage digital giving—only about 19% raised more than half their revenue online, and a notable share raised nothing digitally at all.





Grant Landscape – Maintaining & Expanding Diverse Funding Streams

- **Best Buy Foundation** – Final application due April. (Est. \$232K)
- **Polk County Development Grant – Pending.** Decision expected by end of year.
- **KKR – Pending** decision by end of year. (Est. \$20K for Oak Studio)
- **Guide One Insurance – Pending;** awaiting decision.
- **Athene – Pending;** awaiting decision. (Est. \$5-\$10K for Oak Studio)
- **ITA Group – Pending;** awaiting decision. (Est. \$1K)
- **Principal – LOI approved;** full application due 2/27. (Est. \$100K for workforce)
- **Bankers Trust - Pending;** awaiting decision. (Est. \$30K for youth employment)
- **Shared Visions FY27-FY31–** New 5-year application due 3/6/26 (Est. \$266K annually)
- **Iowa Early Childhood Continuum of Care – Pending;** awaiting decision. (Est. \$100K/annually for three years).
- **IWD Future Ready Iowa – Pending;** summer youth internship program.
- **Prairie Meadows –** (2) applications due 2/27).
- **Delta Dental of Iowa –** application due 3/1.
- **United Way of Central Iowa –** (7) applications due 3/2.
- **Bank of America –** Application due 3/2 for workforce programming.
- **AARP –** Application due March 4 for Senior-related project.
- **Shared Visions Parental Support –** application due 3/26.
- **Polk County Housing Trust Fund –** application due May 1.
- **Storey Kenworthy –** sponsorship application; monthly revolving window.
- **Sammons Financial -** sponsorship application (Est. \$20K)
- **Merchants Bonding Company –** application due

Capital Projects

- **Mainframe Parking Lot** – deadline for purchase February 11.
- **Urban Community Center** – Second installment of appreciated DOW stock from Toni & Tim Urban is expected in April. Est. value - **\$134,000**.
- **Shade Structures / Swing Set Pocket Park** – Installation TBD.

2026 Fundraising Timeline

Quarter	Key Actions
Q1	Secure major grants and corporate financial support.
Q2	Strengthen individual giving through quarterly touchpoints, expand event sponsorships, increase board utilization.
Q3	Execute major fundraising events, launch a digital giving campaign.
Q4	2026 Oak Society event & year-end giving campaign, cultivate 2027 Oak Society and Golden Oak honorees.





Oak Studio Teen Tech Center

- Rebranding is underway for Oak Studio, removing references to Best Buy in the studio, as well as online. Partnerships with The Clubhouse Network and Project Invent continue.
- Oak Studio's current contract with Best Buy expires in April 2026 at which time we will apply for the final grant of approximately \$232,000 (18 months of funding support).
- Career Pathways cohort meets weekly on Thursdays on their health-themed capstone project for Demo Days in San Francisco in May.
- Internships have been secured for four of the 10 Career Pathways participants; Host sites/companies are needed for the remaining six teens. All Career Pathways students are required to complete the 9-month program before being considered for an internship placement. Please contact Emmett Phillips if you or your company can support a teen: 515-895-0094 (cell) or ephillips@oakridgeneighborhood.org.
- The collaboration with Starts Right Here begins in February. Youth with justice system involvement will be participating in weekly programming at Oak Studio.
- Oak Studio staff assisted three tech center teens with the highly competitive Best Buy/United Negro College Fund scholarship application worth \$40K over four years.

Event Strategy

- **Breakfast at Tiffany's – Sunday, April 26, 2026, at Willow on Grand Revenue.** FY25: \$52,715 gross; \$38,800 net.
- **Oak Society Reception 2026:** Date, Honoree and location, TBD. Proposal to eliminate JJJ and elevate this event as a year-end kickoff. Development Committee to discuss.

Software Update

- Raisers Edge NXT migration went "live" on December 18. Six training sessions are currently underway. Marketing staff were invited to participate, as well.



FAMILY & WORKFORCE PROGRAMS

JANUARY 2026 ACTIVITY REPORT

Total Served

432

Unique Individuals Served

194

Job Placements

12

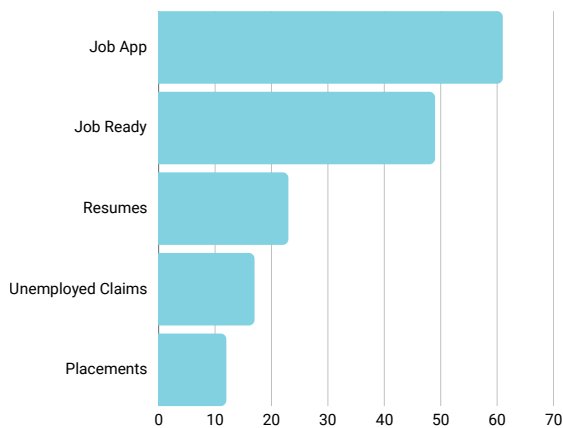
Max Salary

\$21.00 hr

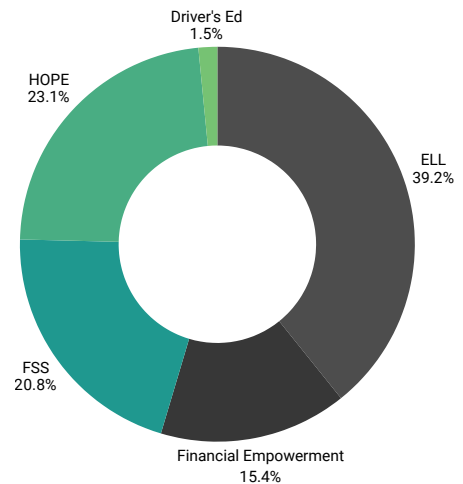
Zip Codes

20

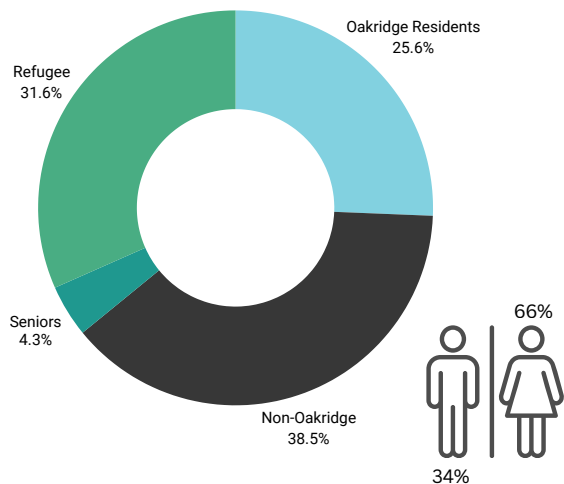
Workforce Readiness



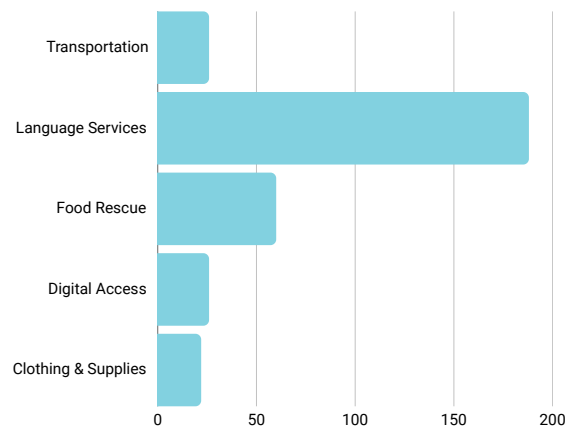
Engagement



Clients' Profiles



Service Points



Emerging Trends

- Increased unemployment claims
- Rising demand for essentials services
- Ongoing affordable housing shortage
- High demand for ELL classes
- Tightening job market
- Rising demand for transportation

Efforts & Initiatives

- 12 individuals secured employment
- 60 families accessed food pantry and essential household items
- 51 enrolled in ELL classes @ Oakridge
- 22 participated in financial coaching
- 4 utilized Oakridge's laptop lending library
- 2 individuals completed 51 hrs driver's education course

Upcoming Events

- Spring clothing & essentials giveaway
- Digital literacy classes
- DART training & bus passes for new comers
- Work readiness workshops
- IMPACT energy assistance sign-up in April