



2021

Annual Report

For those who manage to make a difference.™



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The IREM® Foundation is a 501(c)(3) nonprofit corporation created in 1977 to provide educational and research programs for real estate managers, educators, the government, and the public. The Foundation is largely supported through tax-deductible contributions from IREM members.

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President's letter



Dear friends,

Now more than ever, real estate managers are making a difference in the health, safety, and lives of their tenants and residents. The pandemic showed us the importance of funding resources, including research and education, that real estate managers need to support their communities.

Luckily, in 2021 we started to see more signs of the world opening. The Foundation leaned into its' mission and stepped up to further expand programming. Below are just some of the examples of how the Foundation continued to grow and support even more industry professionals. In this report, you'll be able to read more about how we:

- Added two new scholarships for members to receive financial assistance toward achieving their education goals
- Provided a grant to help fund the Career Opportunities in Real Estate (CORE) program powered by The University of Alabama for underrepresented groups to gain industry knowledge and job-ready skills
- Created a new event through the Summer of Service for IREM members to come together to serve and impact their local communities
- Awarded five Elaina's Sustainability Fund grants
- And grew the HQ Foundation team to provide additional support to a growing number of beneficiaries

In October 2021, we were delighted to be able to enjoy an in-person 2021 Global Summit in Las Vegas where we celebrated the inspiring legacies left by Bob and Gladys Beal and Eugene Burger. It was a pleasure to finally see so many friends and colleagues gathered again.

I hope you enjoy reading the 2021 Annual Report and learning about all the ways the Foundation has grown in the past year. We could not have done it without your help. Your generous support is an inspiration.

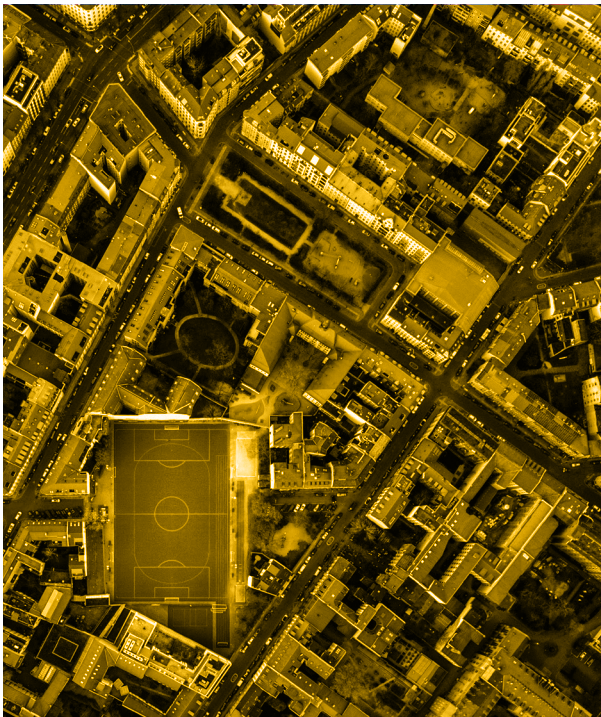
In gratitude,

A handwritten signature in black ink, appearing to read "Julie L. Scott". The signature is fluid and cursive, written on a light blue background.

Julie L. Scott, CPM®
2021 IREM Foundation President

Who we are

We believe that
**well-managed
real estate**
leads to **thriving
communities.**



Our purpose: to
provide resources
for people and
organizations to
advance the real
estate profession.

We value: forward-thinking | curiosity | diversity | engagement

Board of Directors



Foundation President

Julie L. Scott, CPM®
Colliers International, AMO®
Portland, OR



Foundation Vice President

Karen Pharr, CPM®
Insite Properties, LLC
Charlotte, NC



Executive Director

Denise Froemming, CAE, MBA, CPA
(Jan. – Oct.)
IREM® Headquarters
and



Bernadette Patton
(Oct. – Dec.)
IREM® Headquarters



Malcolm W. Bates, CPM®
Richmond, VA



Anshu Bera, CPM®
The RMR Group
Wheaton, IL



Walter J. Crumpler, CPM®
Welltower, Inc.
Charlotte, NC



Terrell T. Edwards, CPM®
Terrell Edwards, LLC
Seattle, WA



Benjamin R. Forsyth, CPM®
Westerra Corp.
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REIS Associates
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Shawn P. Harvey, CPM®
Lee Associates
Houston, TX



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Cushman & Wakefield, AMO®
Indianapolis, IN



Byrdy L. Kelley, CPM®, ARM®
Melan Property Management
Bethesda, MD



Clark Lindstrom, CPM®
Peterson Properties, Inc.
Wichita, KS



Christopher E. Mellen, CPM®, ARM®
The Simon Companies
Dedham, MA



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IREM® Houston Chapter
Houston, TX



Regina Taylor Mullins, CPM®
Cushman & Wakefield, AMO®
Arlington, VA



Frederick W. Prassas, CPM®
PMC Management Group
La Crosse, WI



Ann E. Reisch, CPM®
Reisch Consulting Group, Inc.
Incline Village, NV



Jonathan Tucker, CPM®
Cortland, AMO®
Atlanta, GA



Deborah Deraney Westphal, CPM®, ARM®
IREM® Georgia Chapter
Franklin, TN



Eileen Wirth, CPM®
MEND, Inc.
Florence, NJ

IREM Foundation HQ Team



Lynn Disbrow
Chief Operating Officer
Chicago, IL



Rebecca O'Brien
Foundation Senior Director
Chicago, IL



Dana Gudel
Foundation Development Manager
Chicago, IL



Ryan Brevard
Foundation Coordinator
Chicago, IL

Your impact

Scholarship activity

With the help of our generous contributors, the Foundation continues to support the dreams of industry professionals through access to education by providing an expanding scholarship program.

In 2021:

539 people received a scholarship



732 courses were funded by Foundation scholarships



30% scholarship recipients identified as belonging to an underrepresented population

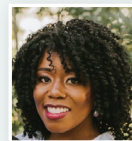
The IREM Foundation distributed scholarship funds totaling **\$410,215**

The IREM Foundation Board of Directors dedicated **20%** of their scholarship budget to the Diversity Scholarship

Growing the HQ Foundation team has allowed additional, dedicated, staff support to scholarship recipients through their education journey

The Foundation is expanding our reach and offering scholarships to a wider range of individuals by offering a total of six different scholarships, including two brand new in 2021:

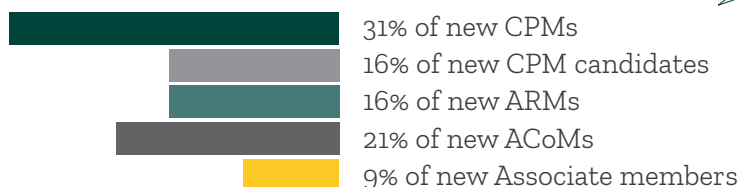
- Donald M. Furbush, CPM® Scholarship
- Bette Fears, ARM® Scholarship
- Paul H. Rittle, Sr. Memorial Scholarship
- Diversity Scholarship
- **New:**
 - New England Past President’s Scholarship
 - Robert K. and Gladys M. Beal Legacy Scholarship



“Pursuing my CPM designation is a career and personal goal for myself to grow, excel and gain a greater understanding of the real estate world. The certification is more than just three letters behind my name, it is proof of my dedication to my craft. Real estate is my passion and honestly, I was born for it, but the CPM designation will allow me to be great at it. The scholarship will help tremendously and lift a financial burden for me to accomplish my goals. Most importantly, the scholarship would relieve worry of ‘how’ and allow me to focus on completing the course.”

– Letina Walls, Diversity Scholarship recipient
IREM Dallas Chapter

Scholarships are impacting and supporting a significant number of members across different types of IREM memberships:



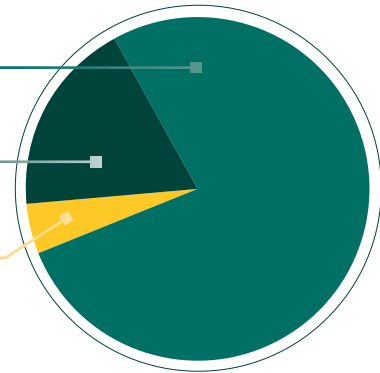
What we fund

The IREM Foundation awards grants to programs and research that advance the real estate management profession, support academic outreach, and increase diversity in the industry.

\$91,625 to diversity initiatives

\$21,932 to student & academic outreach

\$5,400 to COVID-19 relief



Total of \$118,957



Supported workforce development by hosting brand new virtual career fair

The IREM Foundation partnered with the National Apartment Association (NAA) to demonstrate their combined commitment to equity, inclusion, and diversity by hosting a virtual career fair. Many employers are interested in improving diversity in their workforce and this event helped recruit talent from all different backgrounds and promote diversity, equity, and inclusion in the property management profession.

Participants were able to talk directly to employers about job responsibilities, career growth, take part in mock interviews and more! Over **350** job seekers attended and had access to speak to **40** companies. And, the event raised a lot of awareness for real estate management careers. Through the advertisement efforts, we had over **2 million impressions** and around **18,000** visitors to the event registration page.

15 leaders from underrepresented populations supported through IREM's Diversity & Inclusion Succession Initiative (DISI)

9 student scholars

sent to the 2021 Global Summit



New diversity initiative funded by the Foundation



As a founding partner of Career Opportunities in Real Estate (CORE) established at The University of Alabama, we're excited to help "make diversity in real estate a reality." CORE participants gain industry knowledge, job-ready skills, and mentoring opportunities leading them to launch a successful career in real estate. The 2021 pilot resulted in:

- Over **20** schools and **10** HBCUs being represented by participants
- **907** hours of online learning
- **165** 1:1 life coaching sessions
- **3,933** online lessons completed inside course modules

CORE's mission is to empower over 100,000 members from underrepresented groups to consider real estate as a "career of choice, not chance" by 2032."

Professional recognition awards

The IREM Foundation recognizes outstanding individuals who make extraordinary contributions to the real estate management profession.

☆ J. Wallace Paletou Award

for significant contributions to the real estate management industry by an ARM® or CPM®



2021 recipient

Glenn French, CPM® Emeritus
G. L. French & Associates, Inc.
Raleigh, NC

Glenn French, CPM® Emeritus, celebrated his 46th year as a CPM, after 41 years ago becoming the first African American to join the IREM faculty. In 2009, in partnership with IREM, French became the first person in the nation to establish a real estate degree program at a Historically Black College or University (HBCU) when he launched the real estate major at St. Augustine University, an HBCU in Raleigh, North Carolina. French served as co-chair of IREM's HBCU task force, and his efforts laid the groundwork for much of the progress happening today. As a consultant to Harvard's Public Housing Operating Cost Study, French has contributed greatly to public housing.

☆ Lloyd D. Hanford Sr. Distinguished Instructor Award

for outstanding contributions to the profession by serving as an IREM instructor



2021 recipients*

Tom Elmer, CPM® Emeritus
Oakwood Partners, LLC
Minnetonka, MN

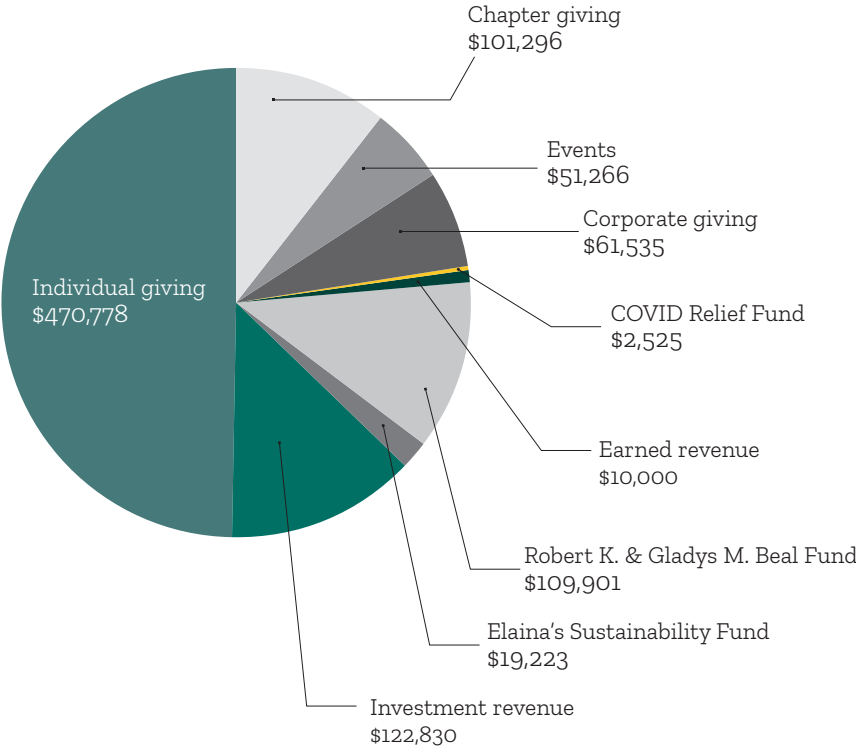
Thomas Elmer, CPM® Emeritus, has been an IREM instructor since 1990 and has taught the Asset Management (ASM) Track throughout the U.S. and China. Recently, he was certified to teach the MPSA preparation course and has used IREM's live online course model to lead students through their final stages of preparation before taking their CPM and MPSA exams. By lending his expertise to students as they prepare for the CPM Capstone, he demonstrates his commitment to advancing the next generation of real estate leaders. In 2020, he received the IREM Minneapolis Chapter's CPM of the Year award to recognize his contribution as an educator and mentor.

*The IREM Foundation also recognized an international member as a recipient for this award in 2021 but in compliance with local laws their name will not be published.

Financial overview

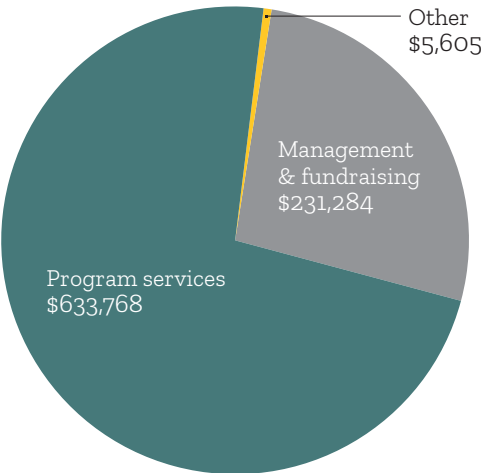
Revenue

Total revenue \$949,354



Expenses

Total expenses \$870,657



Assets & liabilities

Total liabilities and net assets \$2,627,808

Total assets	\$2,627,808
Liabilities	\$99,683
Without donor restriction	\$2,338,793
With donor restriction	\$189,332

Coming together to make a difference

IREM members everywhere came together in 2021, both virtually and in-person, to make a difference in their local communities and the real estate management industry.

Summer of Service



The IREM Foundation launched its first Summer of Service event which celebrated the daily impact property managers have in their communities by bringing together participants in service to help communities thrive. IREM chapters and individuals sponsored both in-person and virtual service projects across the globe. Projects included addressing food and housing insecurity, community clean ups, and other inspiring service projects. The event raised nearly **\$15,000** to support diversity, equity, and inclusion initiatives in the real estate management profession.



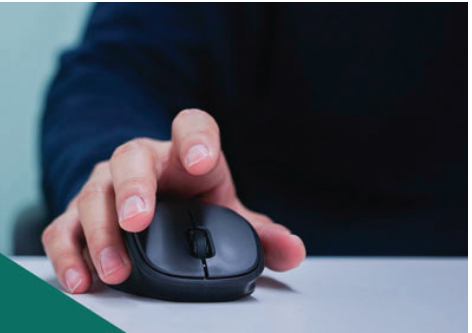
Virtual silent auction



2021

Virtual Silent Auction

Auction closes 10/14 at 11 pm CST



During the 2021 Global Summit, the IREM Foundation held a virtual silent auction for IREM members to log onto from the comfort of their homes to bid on amazing packages like IREM CPM Starter Kits, mentoring experiences, trips, spa visits and so much more! This year's event raised **\$30,000** to support scholarships and diversity initiatives.

Thank you to our auction donors:

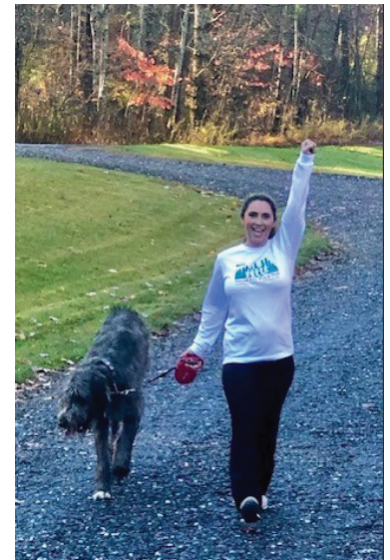
Ana Kucelin, MS, RDN, LDN
Afton Mountain Vineyard and Tony Smith, CPM®
Barry Blanton, CPM®
Chip Watts, CPM®
Cortland, AMO®
Chuck and Deborah Westphal, CPM®, ARM®
Denise LeDuc Froemming
Dr. Deborah Phillips, CPM® and The Quadrillion
Granite Properties
IREM Headquarters
IREM Indianapolis Chapter
IREM Minnesota Chapter
Jo D. Miller
Libby Ekre, CPM®
Melan Property Management
My Software Tutor
REAME LLC
Renee Savage, CPM®
Stephanie Swanson, CPM®, ACoM



Virtual Fun Run



IREM members around the country came together virtually in support of industry diversity and educational programs by participating in this 5k run or 1 mile walk. Thanks to our sponsor team at Lincoln Property Company and everyone who snapped a selfie along the way!



Elaina's Sustainability Fund

In 2021, the IREM Foundation awarded the first class of grant recipients to five projects focused on the innovation or adoption of sustainability and occupant wellness initiatives that impact the buildings where we live, work, shop, and play. These recipients are doing work around the globe to make their communities, homes, and businesses more sustainable, and foster happy and healthy living.

Research



Project: Case Studies in the Implementation of IREM's Certified Sustainable Property Program (CSP) by Erin A. Hopkins, PhD at Virginia Tech University

Location: Blacksburg, VA

About: This research study was conducted to provide real estate management professionals and policymakers with a better understanding of IREM's CSP program as environmental-focused practices become increasingly more common. Four IREM CSP multifamily properties were analyzed in this case study to determine best practices that can be adopted by real estate managers interested in supporting or participating in IREM's CSP program.

Innovate



Project: Wastezon Smart Bin

Location: Rwanda

About: With a vision of creating a waste-free world, Wastezon introduced a solution that responds to households' waste collection needs and the growing demand for fertilizers or compost. Wastezon Smart Bin offers automated sorting, tracks waste decomposition, sterilizes the waste odor, and provides real-time information to enable effective waste collection services.



Project: The Vietnamese American Community of Austin, Texas (VACAT) education campaign

Location: Austin, TX

About: VACAT provided educational materials in writing and YouTube videos in Vietnamese to educate more than 12,000 Vietnamese residents in Austin, TX on how to conserve energy and increase recycling within their homes.

Adopt



Project: Zion Christian Academy solar panel installation

Location: Ogbomosho, Nigeria

About: Zion Christian Academy is a boarding school for school aged children, located roughly four hours away from Lagos, Nigeria. This grant allowed the school to install approximately 30 solar panels, allowing for running electricity for 24 hours. With this improvement, children can learn, shower, and play safely during the evening hours.



Project: Riverview Apartments senior garden beds

Location: Pittsburgh, PA

About: Interested in bringing green initiatives to their senior housing complex, Riverview Apartments created a large, raised garden for residents to grow herbs, vegetables, and flowers to be used and enjoyed in their own homes or in the communal kitchen.

Thanks to our 2021 Elaina's Sustainability Fund contributors:

IREM British Columbia Chapter
Greater Toledo Community
Foundation
Barry G. Blanton, CPM®
Dawn M. Carpenter, CPM®
Gregory A. Cichy, CPM®

Mark Dahlke
Denise Froemming
Cheryl Gray, CPM®
Joseph S. Greenblatt, CPM®
Elizabeth H. Machen, CPM®
Christopher Migala

Rebecca O'Brien
Kendall Peart
Charles Stade
Stephen R. Wall, CPM®
O. Randall Woodbury, CPM®
Cher R. Zucker-Maltese, CPM®

▶ You can read more about the 2021 recipients at irem.org/about-irem/irem-foundation/grant-recipients



Celebrating the legacies of IREM legends

Robert K. and Gladys M. Beal

Friends and colleagues of longtime CPM and friend of IREM, Bob Beal, and his wife Gladys, gathered at the IREM Foundation's Major Donor Reception during the 2021 Global Summit in Las Vegas, NV, to celebrate the pair's incredible life and legacy. Thoughtful tributes from friends and colleagues, Mac Bates, Ed Boudreau, Alan Huffman, Nancy Kirk, and John Magnuson left everyone feeling inspired by the generosity and passion of the Beals.

The Foundation celebrated their legacy by awarding the first Robert K. and Gladys M. Beal Legacy Scholarships in 2021 for IREM members who have volunteered within their local chapters.



Meet one of the 2021 Beal Legacy Scholarship Recipients:
Christy Drawn, ACoM



Chapter: Las Vegas

Volunteer Experience: Diversity Committee, IREM Professional Committee, Income & Expense Committee

Overview: Christy was so excited to receive the Beal Legacy Scholarship and take her Capstone in December 2021. If it wasn't for the scholarship, she would have needed to wait another six months, despite being ready sooner.

"I have been in the field for over 15 years and have a commitment to enhancing my real estate career. Over the last 3 years I have been pursuing my CPM designation. I wanted to pace myself and ensure that I understood all the aspects related to my role as a CPM®. I currently hold my ACoM and having that designation has increased my value at work, enhanced my self-esteem and has made me an inspiration to my peers. I have been fortunate to receive scholarships to help me financially along the way, and I have transferred that help into paying it forward to others."

– Christy Drawn, ACoM



Thank you to our 2021 Robert K. and Gladys M. Beal Endowment donors!

William E. Borsari, CPM®
Edward H. Boudreau, CPM®
Robert O. Click, CPM®
Ronald L. Goss, CPM®
William H. Hopkins
W. Alan Huffman, CPM®

Nancye Kirk
Robert T. Love, CPM®
John W. Magnuson, CPM®
Frederick W. Prassas, CPM®
Mr. Michael B. Simmons, CPM®



A thought leader, role model, educator, and a champion of the affordable housing industry, Gene Burger was a true real estate management legend. He served as IREM's president in 1981 and as the Foundation's president in 1988-1989 and unfortunately passed away in 2021. A special announcement was made at the 2021 Foundation Major Donor Reception that Ms. Manuela Silva, CEO of Community Housing Opportunities Corporation, and close friend of the Burger family, generously donated \$25,000 to create a scholarship fund to honor Gene's legacy and significant lifetime of work. It was an inspiring evening for all in attendance. The Foundation is currently underway to officially launch the Eugene Burger Scholarship, specifically benefiting those working in the affordable housing industry in 2022.

Planned giving – Legacy of Leaders

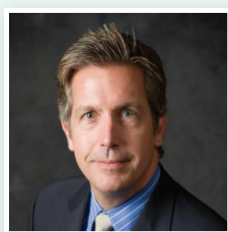
Thank you to those who are providing for the future by including the Foundation as a beneficiary in an estate plan:

Raymond Baca, CPM®
Malcolm W. Bates, CPM®
William E. Borsari, CPM®
Edward H. Boudreau, CPM®
Robert O. Click, CPM®
Douglas F. Collins, CPM®
Jo Anne Corbitt, CPM®
Chip Crumpler, CPM®
James A. Evans, CPM®
Dawn E. Ford, CPM®
John N. Gallagher, CPM®

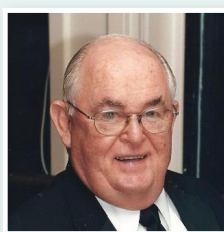
Kenneth Goodacre, CPM®
Emily C. Goodman, CPM®, ARM®
Cheryl A. Gray, CPM®
W. Alan Huffman, CPM®
Elizabeth H. Machen, CPM®
Victoria R. Parmentier, CPM®
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Russell C. Salzman, CAE, IOM
E. Craig Suhrbier, CPM®
Robert B. Toothaker, CPM®
Deborah Westphal, CPM®, ARM®



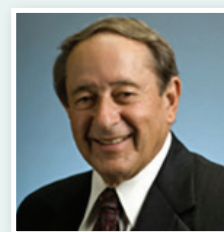
In memoriam:



John H. Windsor III, CPM®
1960-2017



Robert K. Beal, CPM®
1930-2013



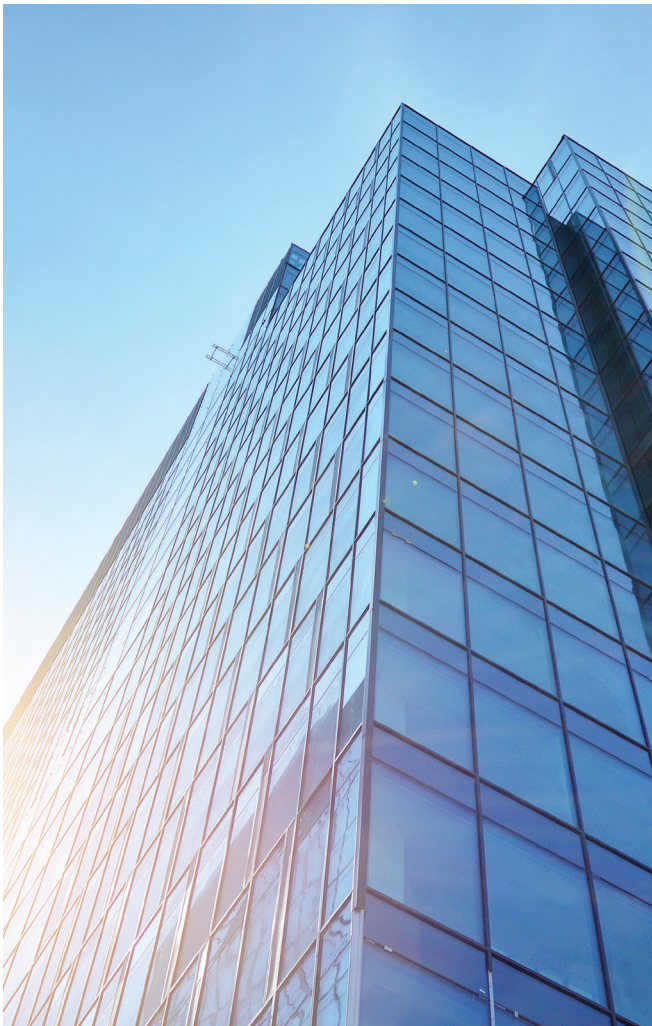
Eugene J. Burger, CPM®
1933 - 2021

➤ For information about joining the Legacy of Leaders, email foundation@irem.org.

Major contributors

Thank you to all our contributors who have made a significant investment in the IREM Foundation. Donors that reach a total historical giving of \$2,500 or more are invited to special events and receive customized lapel pins during IREM's annual meeting.

Congratulations to our new and rising major contributors who reached new levels of giving as of December 31, 2021.



New and rising Major Donors:

Gold

Stephen L. Burger, CPM®
Elizabeth Ann Ekre, CPM®
James A. Evans, CPM®
Shawn P. Harvey, CPM®
Peter J. Lewis, CPM®
Robert T. Love, CPM®
John W. Magnuson, CPM®
Ron J. Penner, CPM®
R. Wayne Pierce, CPM®
Jolene Terry-Phinney, CPM®
Gwen Volk, CPM®
John A. Warthman, CPM®

Emerald

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Debra Gray
Joseph S. Greenblatt, CPM®
George D. Griffin, CPM®
Mickey E. Layden, CPM®
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Sapphire

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Deborah R. Phillips, CPM®

Ruby

Jonathan L. Tucker, CPM®
Donald B. Wilkerson, CPM®

Double Diamond:

Cher R. Zucker-Maltese, CPM®

Full list of Major Donors

Double diamond \$100,000+

Joseph T. Aveni, CPM®
Robert Winder Nordblom, CPM®
Cher R. Zucker-Maltese, CPM®

Double ruby \$50,000+

Cheryl Gray, CPM® & Richard L. Gray, CPM®

Ruby \$25,000+

Madeleine E. Abel, CPM®
John N. Gallagher, CPM®
Saadat Keshavjee, CPM®
Lee Anne Nimkoff, CPM®, ARM® &
Louis H. Nimkoff, CPM®
Michael B. Simmons, CPM®
E. Craig Suhrbier, CPM®
Jonathan L. Tucker, CPM®
Donald B. Wilkerson, CPM®
O. Randall Woodbury, CPM®

Sapphire \$10,000+

Malcolm W. Bates, CPM®
William E. Borsari, CPM®
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Barbara A. Campbell
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Anthony W. Smith, CPM®
Robert B. Toothaker, CPM®
Mary W. Wilken, CPM®

Emerald \$5,000+

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Barry G. Blanton, CPM®
Mark J. Boehnlein, CPM®
Dawn M. Carpenter, CPM®
Dorcas A. Cecil, CPM®, ARM®
Dawn E. Daffinee, CPM®
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Denise Froemming
Debra Gray
Kenneth Goodacre, CPM®
Joseph S. Greenblatt, CPM®
George D. Griffin, CPM®
Dee E. Headley, CPM®
Jesse Holland, CPM®
Nancye Kirk
Brett M. Koutnik, CPM®
Mickey E. Layden, CPM®
Elizabeth H. Machen, CPM®
Christopher E. Mellen, CPM®, ARM®
Patricia A. Nooney, CPM®
Kenneth M. Paul
Karen L. Pharr, CPM®
Ted Rausch, CPM®
Beverly A. Roachell, CPM®
Jae A. Roe, CPM®, ACoM
Julie L. Scott, CPM®
William Sheridan
Lori A. Tillis, CPM®
Chip Watts, CPM®
Deborah Deraney Westphal, CPM®, ARM®
Eileen D. Wirth, CPM®
Edward Zehfuss, CPM®

Gold \$2,500+

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Raymond Baca, CPM®
Branden J. Barker, CPM®
Mez R. Birdie, CPM®
Irving M. Blue, CPM®
Aaron Mandel Bosshardt, CPM®
Jeffrey Branch
Lori E. Burger, CPM®
Stephen L. Burger, CPM®
William A. Butler, CPM®

Craig L. Cardwell, CPM®
Lynn M. Disbrow
Elizabeth Ann Ekre, CPM®
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Glenn L. French, CPM®
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Geo Kumetz
Michael T. Lanning, CPM®
Kristin D. Layeux, CPM®
Richard Y. Lee, CPM®
Peter J. Lewis, CPM®
Robert T. Love, CPM®
John W. Magnuson, CPM®
Vera C. McPherson, CPM®, ARM®
Helen M. Moise, CPM®
Ron J. Penner, CPM®
R. Wayne Pierce, CPM®
Frederick W. Prassas, CPM®
Mel E. Schultz, CPM®
Kimberly M. Sisney, CPM®
Jolene Terry-Phinney, CPM®
Gwen Volk, CPM®
Karen E. Ward, CPM®
John A. Warthman, CPM®
Gregory R. Wingate, CPM®
G. Smedes York, CPM®

Annual contributors

The IREM Foundation is grateful for the generous support from individuals, corporations, foundations, and chapters whose gifts support our work. The following gifts were received between January 1, 2021 and December 31, 2021 and include all gifts regardless of designation.

Individual donors

President's Circle \$5,000 and above

Debra Gray
Robert Winder Nordblom, CPM®
Jonathan Leigh Tucker, CPM®
Donald B. Wilkerson, CPM®
Cher R. Zucker-Maltese, CPM®

Board Room \$3,000 to \$4,999

Walter J. Crumpler, CPM®
Deborah R. Phillips, CPM®

Mezzanine Club \$1,000 to \$1,999

Joseph T. Aveni, CPM®
Malcolm W. Bates, CPM®
Jason Blackburn
Barry G. Blanton, CPM®
William E. Borsari, CPM®
Edward H. Boudreau, CPM®
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