



Rochester Area
Foundation



THANKS TO YOU Annual Report 2016



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Leadership Message

Wendy Shannon & Karel Weigel

Dear Friends,

“Building and enhancing the quality of life for all in the Greater Rochester Area through philanthropic leadership and community partnerships.”

Bringing life to that mission has always required the collective efforts of the community and the Rochester Area Foundation as we work together. A glance through these pages will show you these efforts continue with renewed vigor!

Our region is noted for its unique geologic features, advances in medicine, science, technology, and educational excellence as well as pride in our agricultural heritage. However, we also share an enduring human value; we care for and about each other. This year’s annual report reflects the tapestry of these efforts and the many ways they impact our communities.

Thanks to you - our friends, volunteers, Trustees, donors, and fellow community members - the Rochester Area Foundation is the hub for givers and doers with big dreams and generous hearts.



“The Rochester Area Foundation is the hub for givers and doers with big dreams and generous hearts.”

Whether the focus is on helping children succeed, boosting economic opportunity, or driving equity and inclusion, we bring together people like you to strengthen communities and inspire giving for lasting change.

Join us in creating better communities for all in the Rochester area. Bring us your hopes for the future and we’ll show you how to make the greatest impact on the causes that matter most to you, today and forever.

Sincerely,

Karel Weigel
Interim President

Wendy Shannon
Chair, Board of Trustees

ROCHESTER AREA FOUNDATION'S YEAR IN REVIEW 2016

This year was a year of transitions for the Rochester Area Foundation. Because of the generous support of many of you and our communities at large, we were able to move in to our new building and permanent home. As we move forward, we have an exciting opportunity to envision and shape the future of our community foundation to meet the needs of our robust and diverse communities, as well as new generations of philanthropists. Growing the community endowment and engaging a wide-ranging group of stakeholders will be the keys to being flexible enough to address new needs while staying true to the vision that Harry Harwick had for this community foundation almost 75 years ago.

TOTAL GIFTS AND PLEDGES

\$2,962,287

NUMBER OF GIFTS

698

PHILANTHROPIC LEADERSHIP

310

Funds are held at RAF for individuals, families, businesses, nonprofits, and fiscal agents

In the last five years, RAF Funds have an average return of 6%

weGIVE365

weGive365 members give a minimum of \$1 per day equaling \$365 annually. By pooling lots of small funds into one large fund, weGive365 members are able to make impactful grants which improve our community today and into the future.

In 2016, weGive365 members chose to award grants to the following organizations:

Bolder Options | Diversity Council | RideAbility | Rochester Student Health Services' Rochester ALC Clinic | Ronald McDonald House | Sports Mentorship Academy | Zumbro Valley Health Center

The application for weGive365 membership is available on the Rochester Area Foundation website at: www.rochesterarea.org/give/wegive365.php



GRANTS BY ISSUE AREA

All 501(c)3 organizations are eligible to receive grants from the Rochester Area Foundation and our fundholders.

HEALTH & HUMAN SERVICES - \$680,239

YOUTH & EDUCATION - \$438,763

COMMUNITY DEVELOPMENT - \$199,435

RELIGIOUS - \$211,341

ARTS & CULTURE - \$54,998

ENVIRONMENT & ANIMAL WELFARE - \$52,630

SCHOLARSHIPS

\$129,128

in scholarships were given to students through RAF



GRANTMAKING

290

Nonprofits were served by grants given through the Rochester Area Foundation

FIRST HOMES

210

Homes are held in the community land trust, which keeps them affordable in perpetuity.

WELCOME HOME

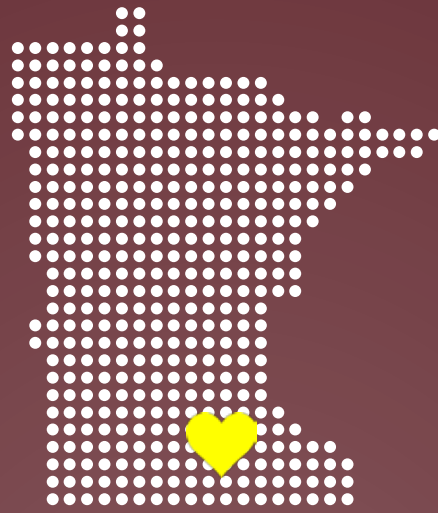
200

People attended our open house to celebrate the Rochester Area Foundation's new, permanent home

COMMUNITY MEETING SPACES

The Rochester Area Foundation building was designed as a resource to serve the community with convenient, well-equipped, inexpensive public meeting room access. It serves as the "home" for many community groups with monthly meetings, workspace for community initiatives and gatherings, and as meeting space for nonprofit organizations. Three spaces are available for rental: a conference room seating 8, a formal board room seating 20, and a flexible community room seating up to 80. All rooms are equipped with an in-house computer and dedicated secure server, audiovisual equipment, videoconferencing capabilities, wifi access and sound system. Nonprofit groups receive a 50% discount on all usage.





Here in our communities,

we care about our neighbors. We give to local causes. Our nonprofits work tirelessly to help those in need, and our community leaders serve with commitment and passion.

The Rochester Area Foundation brings these caring people together to create better communities for all. However, real change doesn't happen overnight. Addressing the root causes of community challenges demands that we take the long view.

The Rochester Area Foundation holds the torch for issues that may take decades to resolve. We provide a neutral place for difficult conversations. We endeavor to lead the way forward so we can all work together to create real and lasting change.

In the pages that follow, you'll read about generous community members who have created funds to benefit our region forever. You'll learn about grants that have enabled local nonprofits to advance or create mission-critical programming. We hope you'll be inspired to join us in creating better communities for all.

THANKS TO YOU...



Kids are spending more time outside in nature

“We wouldn’t be able to reach nearly as many children if we didn’t have support from RAF.”



The average student today spends less than 10 minutes per day outside, but spends 8-10 hours in front of an electronic screen.

That statistic and her experience as a naturalist prompted Sara Holger to start Project Get Outdoors, a nonprofit dedicated to helping youth experience, explore, and care for nature.

“We serve all kids, but we’re really trying to find ways to serve kids that wouldn’t otherwise have access to the outdoors. I’m excited to see kids grow up to care about the environment so they want to protect it as they grow older,” Sara explained.

The Rochester Area Foundation provided a grant of \$5,000 to put together activity backpacks with a variety of materials to help adult leaders engage students with the outdoors. The backpacks will be distributed to early childhood centers, schools, and after school programs across the region and allow Project Get Outdoors to provide training and resources to community groups and schools to help get kids outdoors.

Sara was candid about what the grant meant to her relatively small organization. “We wouldn’t be able to reach nearly as many children if we didn’t have support from the Rochester Area Foundation. Thank you for all you do.”

THANKS TO YOU...



There is greater hope for recovery

Exercisabilities was the dream of Dr. Melanie Brennan, who after years of working as a physical therapist in a clinical setting, wanted to be able to serve more patients in a longer-term and more specialized way as a nonprofit organization.

Dr. Brennan explains, "It's expensive to run this operation with the highly trained staff and specialized equipment. Grants are essential for us to be able to provide our services at a cost point that is affordable for people on disability and medical assistance."

Exercisabilities hopes to bring physical rehabilitation, health, wellness, and recreation programming to everyone, despite any need for adaptation, physical help or financial assistance to achieve safe, active, fun and effective recovery

from any medical illness or physical impairment. Their philosophy that lifelong recovery is possible far beyond the current limits of the medical and insurance model is refreshing and unique in the upper midwest.

Exercisabilities received a \$4,000 grant from the Rochester Area Foundation that has allowed patients access to a very specialized piece of equipment. Dr. Brennan said, "The grant we received is for a fairly new piece of equipment on the market - the MedBike. It's an exercise bike that's designed specifically for movement disorders and Parkinson's Disease. It's only the second one available to patients in Minnesota."

THANKS TO YOU...



High school students are coming together to promote literacy at the Juvenile Detention Center

Christie Greason (currently a high-school student at Mayo High School) is at the helm of The Kindness Project, which is being jointly sponsored by the Rochester Public Schools, the Juvenile Probation Department, and the Rochester Phoenix Academy. Research shows that juvenile inmates have a 54% lower recidivism rate if they receive literacy help, and yet they are among the least-served literacy populations.

The Kindness Project received \$6,500 from the Rochester Area Foundation to purchase speciality books for a library at the JDC to serve 500 youth annually. Teens at the Rochester Phoenix Academy have already built five bookshelves in support of this project.

“Christie and her work with The Kindness Project is an inspiration to all of us. She saw a problem, did the research, and started working collaboratively with others to find a solution. It’s exactly the kind of project the Rochester Area Foundation is thrilled to support with a grant from the

Better Communities Fund,” said Karel Weigel, Interim President of RAF.

The impetus of the project started when Christie, a lifelong avid reader, became a student representative on the Olmsted County Department of Corrections Task Force in November 2014. The mission of the Task Force is “to promote safety, justice and restoration through service to the community.” Christie was already an appointed student representative on the Olmsted County Youth Commission, and she really wanted to understand what the Task Force does so she could maximize her potential role there.

“Because a lot of the stuff they talk about is much more advanced than my level, you know what I mean, because they’re like, professionals,” she says. “But I wanted to start a project that I felt could really make an impact and change people’s lives.”

Organizations Receiving Grants in 2016

Rochester Area Foundation, through generous donations from its donors, gave out grants to these organizations in 2016. Many received multiple donations. We thank our donors for making this possible.

Ability Building Center	Catholic Charities of the Diocese of Winona	Dodge Center Public Library	Hiawatha Homes Foundation
AFP Southern Minnesota	Catholic Charities St. Cloud Children's Home	Dodge Center United Methodist Church	History Center of Olmsted County
Aldo Leopold Foundation	Catholic Church of St. John	Dodge County Food Shelf	Holy Spirit Catholic Church
Aldrich Memorial Nursery	Center City Housing	Dodge Nature Center	Homes Within Reach
ALS Association of Minnesota	Channel One Food Bank	Dollars for Scholars	Hope Lodge
Alzheimer's Association	Chatfield Center for the Arts	Dorothy Day Hospitality House	Hope Seeds, Inc.
American Cancer Society	Chatfield Public Schools	Dover Eyota Schools	Institute for Shipboard Education
American Heart Association	Child Care Resource and Referral	Duke University Trinity College	Interfaith Hospitality
American Jewish Joint Distribution Committee	Children's Hospital and Clinic of Minnesota	Eagles 5th District	Iowa State University
American Jewish World Service	Chisholm Community Foundation	Earthjustice	Ironwood Springs Christian Ranch
American Red Cross	Choral Arts Ensemble	Echo Food Shelf	Jeremiah Program
American Red Cross of Southeast Minnesota	Chosen Valley Community Foundation	Elder Network	Jewish National Fund
AmeriCares	Christ United Methodist Church	Embry Riddle Aeronautical University	John Marshall High School
Angel Foundation	Christmas Anonymous	Essential Health Foundation	Journey to Growth Partnership
Animal Allies	Church of St. John the Evangelist	Evergreen Cemetery	Kansas State University
Apple Tree Dental	Church of the Savior	Exercisabilities	Kasson United Methodist Church
ARC SE Minnesota	City of Dodge Center	Family Means	KM Care and Share Charity Fund
Area Churches Together	City of Lakes Community Foundation	Family Promise Rochester	KSMQ
ARS Bellum Foundation	City of Rochester Parks & Recreation	Father Woody's Haven of Hope	Lake City Law Enforcement Association Lodge #208
Arthritis Foundation	Civic League Day Nursery	First Homes	Lake Pepin Legacy Alliance
Augustinian Academy	Coldwater Foundation for Leadership and Community Development	Fort McMurray SPCA	Lake Zumbro Forever
Baltimore School for the Arts	College of St. Benedict	Friedell Middle School	Land Stewardship Project
Barnes Area Historical Society	Columbia College	Friendly Hills Middle School	Las Lomas Education Foundation
Bear Creek Services	Commonweal Theater Company	Friends Committee on National Legislation	Leadership Greater Rochester
Bluff Country Hiking Club	Community Dental Care	Friends of Oxbow	Legal Assistance of Olmsted County
B'nai Israel Synagogue	Community Food Response	Friends of Quarry Hill	Life for Life Academy Charter School
Bolder Options	Community Presbyterian Church	Gamehaven Council, Boy Scouts of America	Lourdes Development
Bolton Refuge House	Covenant House	Georgetown University	Lourdes Foundation
Boys & Girls Club of Rochester	Cut Circle	Gift of Life Transplant House	Luther Seminary
Brains Together for a Cure	Dakota Woodlands	Girl Scouts of Minnesota	Macalester College
Byron Public Schools	DAV Department of Minnesota	Gloria dei Lutheran Church	Madonna Living Community
Cambodian Children's Fund	Diversity Council	Good Earth Village	March of Dimes
Camp Companion	Doctors Mayo Society	Great Deeds	
Camp Olson YMCA	Doctors Without Borders	Grounded Solutions Network	
Campus Crusade for Christ	Dodge Center Foundation	Habitat for Humanity	
Cannon River Watershed Partnership		Hands for Humanity	

Mayo Clinic Alzheimer's Disease Research Center	Owatonna Foundation	School Sisters of Notre Dame	Univeristy of Minnesota Duluth
Mayo Clinic Cancer Center	Oxbow Park	SE Minnesota Regional Legal Services	University of Wisconsin River Falls
Mayo Clinic Department of Development	Paralyzed Veterans of America	Seasons Hospice	University of Alabama
Mayo Clinic Foundation	Parks and Trails Council of Minnesota	Second Harvest Food	University of Minnesota
Minnesota Adult and Teen Challenge	Paws & Claws	Sharing & Caring Hands	University of Nebraska
Minnesota Assistance Council for Veterans	Pax Christi Church	Sisters of St Francis	University of North Dakota Foundation
Minnesota Children's Museum	Pine Island Boy Scouts	Somali Rebuild	University of Northern Iowa
Minnesota Citizens Council	Pine Island Girl Scouts	South Central Service Cooperative for Academic Excellence	University of Notre Dame
Minnesota Land Trust	PKD Foundation	South Dakota State University	University of South Dakota Foundation
Minnesota Private College Fund	Planned Parenthood	Southeast Minnesota Chapter -American Guild of Organists	University of St. Thomas
Minnesota Public Radio	PossAbilities	Southern Minnesota Initiative Foundation	University of Wisconsin Eau Claire
Minnesota State University Mankato	Project Get Outdoors	Southern Minnesota Regional Legal Services	University of Wisconsin Madison
Minnesota State University Moorhead	Project Legacy	Southern Poverty Law Center	University of Wisconsin River Falls
Minnesota Veterans and Emergency Services Museum	Project Zawadi	Special Olympics Minnesota	Valley of Rochester Scottish Rite Children's Foundation
Minnesota Zoo Foundation	Quarry Hill Nature Center	Sports Mentorship Academy	VFW Foundation
Missouri Prairie Foundation	Ravenswood Education	St. Catherine's University	Wabasha County Sheriff's Association
MPN Research Foundation	Reading Center	St. Cloud State University	Waldorf College
NAMI SE Minnesota	Redeemer Lutheran Church	St. Francis of Assisi	Warren Miller Performing Arts Center
National Fire Safety	RideAbility	St. James Coffee Run	Wartburg College
National MS Society	Rochester Area Family Y	St. John the Evangelist	Wilderness Society
National Parks Conservancy	Rochester Area Foundation	St. John's Lutheran Church	Wing House
National Wheelchair Camp/ Ironwood Springs	Rochester Art Center	St. John's University	Winona State University
Navigators	Rochester Chamber Music	St. Louis Public Radio	Winona STEM Village
Never.Give.Up	Rochester Civic Music	St. Luke's Episcopal Church	Women's Shelter
New Life Family Services of Rochester	Rochester Civic Theater	St. Olaf College	Yellowstone Club Community Foundation
Northern Lights Foundation Children's Charity	Rochester Community and Technical College Foundation	St. Olaf Heritage Association	Yellowstone Recreations Foundation
Oasis Pregnancy Center	Rochester Friends Meeting	St. Peter's Episcopal Church	Youth Outreach United
Olmsted County Public Health Services	Rochester International Association	St. Pius Catholic Church	Zumbro Bend Rendezvous
Olmsted Medical Center	Rochester Public Library	Stewartville Area History Center	Zumbro Lutheran Church
OMC Regional Foundation	Rochester Public Schools	The Community Table	Zumbro Valley Audubon Society
One Roof Community Housing	Rochester Student Health Services	The Congregational Church UCC	Zumbro Valley Health Center
Opera Tampa	Rochester Swimming Inc.	The Open Door	Zumbro Valley Medical Center
Orthopaedic Foot and Ankle Foundation	Rochester Symphony Orchestra	Twin Cities Public Television	Zumbro Watershed Partnership
Orthopaedic Research and Education Foundation	Rochester Youth Hockey	UNICEF	
	Rocket Wrestling Club	United Church of Christ	
	Ronald McDonald House	United Way of Dodge Center	
	Rose-Hulman Institute	United Way of Olmsted County	
	Rotary Club of Rochester		
	Rotary International		
	Salute to the 4th		
	Salvation Army		
	Save the Children		

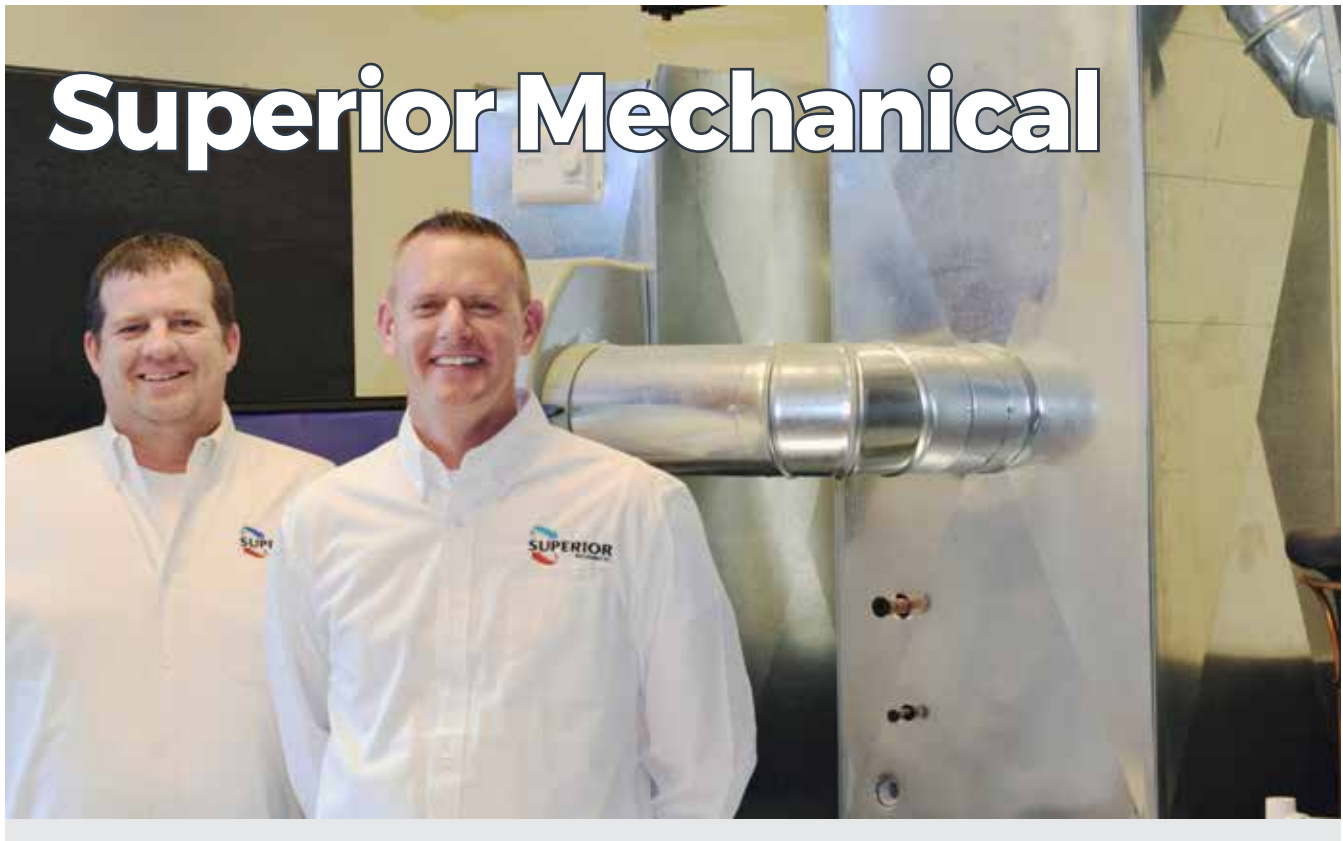


SINCE 1944, HUNDREDS OF COMMUNITY MEMBERS
JUST LIKE YOU

have given to causes they care about through the Rochester Area Foundation.

Through the power of endowment, your friends and neighbors are creating funds that will leave lasting legacies while providing sustainability for future generations. They rely on our knowledge of local needs to ensure that their generosity is doing the most good. And, they enjoy peace of mind knowing that their funds have the flexibility to respond to unanticipated future needs.

You don't need to be wealthy to make a difference for years to come. Tell us about your hopes and dreams for your community, and we'll help you create better communities for ALL, now and forever.



“We wanted a consistent, long-term way to give back to our communities, and an endowed donor advised fund through the Rochester Area Foundation was the way to do it.”

Superior Mechanical has come a long way as a company since Jim Gander began selling water softeners out of his garage in 1982. Now employing over 150 employees across the state, Superior Mechanical is now a full service plumbing, HVAC, piping, refrigeration and mechanical insulation contractor.

Craig Curley, an owner and General Manager emphasizes how important supporting employees and their communities is to the company, “We have many employees in Rochester area communities who are all giving back in their own way. Without employees or the communities in this area we wouldn’t be in business. Giving back feels good and is good business.”

Although Superior Mechanical had been doing a lot of “behind the scenes” giving in the form of in-kind services and scholarship programs, when they decided to formalize their philanthropy

program Rochester Area foundation was the natural partner.

“The Rochester Area Foundation was so easy to work with and provided us with a number of options in terms of structuring our fund. The opportunity to grow our philanthropic dollars through an endowment allows us to give more over time and have a sustainable program,” Craig explained.

Endowed donor advised funds allow individuals or businesses to recommend grants from the investment earnings from the fund each year to nonprofits of their choice.



Ron & Dianne Yanish

Ron and Dianne Yanish, well known for their generous philanthropy in Rochester, have seen several of their grandchildren attend St. Francis of Assisi School, and have two still attending.

Beginning in the fall of 2017, everyone in the school will benefit from the Yanish's generosity on warm days when the newly installed air conditioning kicks in.

Ron said, "I've sat through so many music concerts, basketball games, and grandparents' days in warmer than bearable conditions. If I was feeling this uncomfortable, imagine how students trying to learn and teachers trying to teach were feeling day after day."

The Yanishes decided that a school as wonderful as St. Francis deserved to

be air-conditioned, and that it was a project they could accomplish by using their donor advised fund at the Rochester Area Foundation.

By donating appreciated stock to their fund at the Rochester Area Foundation, Ron and Dianne were able to get the tax deduction for the whole amount of the donation at the time it was given, and will recommend grants to reimburse construction costs to the school as they come in.

Ron explained, "Using our donor advised fund for this project and others in the community has made fulfilling our philanthropic goals pain-free, and the Rochester Area Foundation staff are fun to work with."

Ron says that there are two key quotes that guide his commitment to giving back. The first is "Over and over, it has been made crystal clear to me that the basics of life are important - love of God, family, and friends, a commitment to integrity...and a commitment to leadership," and the second is "The secret to happiness: Being generous with time, talent, and treasure."

***"Secret to happiness:
Being generous with
time, talent, and
treasure."***



Chuck Handlon

“I had the opportunity to work with wonderful students during my 40 years teaching high school chemistry. I hope this scholarship helps more of them pursue a career in sciences or teaching science.”

Countless students who have gone through the Rochester Public Schools will recognize Chuck Handlon’s signature tie-dyed lab coat. Although he retired from Century High School at the end of the 2015-2016 school year, he hopes the scholarship fund he is building at the Rochester Area Foundation continues to give back for years to come.

Chuck’s passion for teaching and connecting with students is unmistakable. During his 40-year teaching career, Chuck says his favorite way to engage students was with hands-on demonstrations, or what he likes to call “Chemical Magic Shows”, that often involved an appearance by his alter-ego, Dr. Boom.

The Chuck Handlon Century High School Scholarship is intended to promote postsecondary study of chemistry and to encourage students to consider a career in chemistry teaching. The scholarship provides one \$500 award to

a Century High School senior in the year of their graduation.

Chuck created the criteria to establish the scholarship at Century High School, but will leave the financial administration of the scholarship fund to the Rochester Area Foundation. “I had previously donated to the Rochester Area Foundation and knew it was a great vehicle for building scholarship funds,” he explained.

The Build-a-Fund option at the Rochester Area Foundation allows fundholders to build their fund over five years, instead of having to supply the entire minimum balance up-front.

Chuck went on to say, “We are facing a serious shortage of teachers, and science teachers in particular. I hope that this scholarship encourages more students to consider a career in teaching science. If you love what you do, it never feels like work.”

2016 Donors

Our heartfelt thanks to all of our generous donors in 2016. Some contributions established new charitable funds while others were added to existing funds or were made in memory or honor of a loved one. Others chose to leave a legacy by giving to nonprofit funds or the Better Communities Fund. We gratefully acknowledge and thank each of you. Rochester Area Foundation has made every effort to ensure the accuracy of our donor list. Please contact us if we have unintentionally omitted or misspelled your name.

Aarke, David	Boys & Girls Club of Rochester	Dunlap & Seeger Law Firm	Grinde, Paul & Honorable Debra
Ahlquist, Dr. David & Susan	Bradley, Francis & Mary	Dunn, Dave & Ellie	Gudlin, Bruce
Aldahl, Steven	Bramel, Inc. DBA Glynnner's Pub	Dyck, J. & Dr. P.J.	Haack, Kenneth & Florence
Aldis, Colin & Pat	Branes, Kathleen & Gordon	Edwards, Dr. Brooks & Dr. Terri	Haack, Richard
Alleckson, Eric	Brinkman, Thomas & Judy	Edwards, Marjorie	Halcon Corporation
Allen, Craig & Linda	Brown, Dr. Philip & Virginia	Elliott, Charles & Marlys	Handlon, Charles
Allen, Dr. George & Dorothy	Brown, Michael & Julie	Emslander, Dr. Richard & Ingeborg	Hanlon, Dr. David & Barbara
Alliance Bank	Brubaker, Dr. Richard & Nancy	Engel, Paul	Hansen, Catherine
Allsen, Jon	Brutinel, Dr. Mark & Kathryn	Ernster, Dr. Leon & Deborah	Hanson, Jean
Amadio, Bari	Buckmeier, Rebecca	Evans, Max	Hanson, Misha
AmazonSmile Foundation	Bue, Michael & Barbara	ExxonMobil Foundation	Hanson, Ron & Jody
Anderson, Chad	Buettner, Dr. Helmut & Heide	F & M Community Bank	Harkess, Paul & Rebeca
Anderson, Constance	Burbank, Dr. Mahlon & Marilyn	Fahy-Gust, Ann & Arthur	Harper, Dr. C. & Mary
Anderson, Gail	Busche, Dennis	Fedje, Tim & Cheryl	Harvey, Michael
Anderson, Neil	Campion, Jane	Fick, Vicky	Hauser, Dr. Mary
Anderson, Sigurd & Sharon	Campion, Mary	Field Seed Farms	Hawkins, Richard
Angelone, Jane & John Hachtel	Canadian Honker Enterprises	Finne, Guy	Hayden, Gary & Nancy
Anonymous	Canadian Honker Restaurant & Catering	Fiorini, Mary	Heartland Tire and Service
Armory Dental LLC	Carrow, David & Lorra	First Security Bank	Heffner, Thomas
Arndt, Georgene	Case, Elaine & Bill Wiktor	Fishbaugher, Sheila	Heitman, Simone
Bahn, Mark & Lucy	Case, Kaye	Fleeger, Charlene	Hepper, Dr. Norman & Charmaine
Bailey, Michael & Kathleen	Central Kentucky Radiology PLLC	Fleming, Robert & Cynthia	Herrell, John & Roberta
Bakke, John & Lois	Chapman, Randy & Sheryl	Flugstad, Dean	Herrell, Margaret & Wallace
Baumgard, Darold & Alice	Chatfield Brass Band, Inc	Fockler, Arnold & Kay	Hesley, Jay
Beck, Hayward & Carolyn	Christopherson, Steven & Marolee	Fogarty, Michael & Joy	Heyn, Charlotte
Becker, Dr. Joseph & Marcie	City Auto Glass	Footh, Norma	Highum, Jay
Behnke, Lynn	City of Rochester	Forbes, Dr. Glenn & Celeste	Hilgendorf, Kay & Lee
Belau, Jane	Clausen, James & Sue	Foresight Bank	Hillenbrand, Doug & Linda
Bender, Dr. Claire	Combined Federal Campaign	Frankel, Amalie	Hodgson, Dr. Stephen & Eleanor
Benike, Aaron & Allison	Community Ventures Fund	Frankel, Elizabeth	Hoffman, Dr. Alan & Judith
Benike, John & Cindy	Connors, Seamus	Freeman, Eugene & Jean	Hoffman, Thomas
Bernath, Bonita & Michael	Connors, Zackery	Friends of Mayowood	Hohberger, Dr. George & Sandra
Berndt, Scott & Michele	Cook, Kathryn	Frogner, David & Barbara	Holst, Maren
Betcher, Audrey	Dahle Douglas, Marsha	Gangeness, Jeanine & Ronald	Holy Anargyroi Greek Orthodox Church
Betcher, Norman & Madelyn	DeCramer, Donald & Barbara	Gates, Catherine	Home Federal Savings Bank
Beyerle, Mary & John	Delfs, Marlene	Geppert, Rollin	Hornrtvedt, Pastor Lester & Dianna
Bigelow, Wallace & Faye	Devine, Richard & Elizabeth	Gerwert, Philip	Howe, Lawrence & Martha
Billing, Lynne	Dicke, Kristine & Grant	Gibson, Kathy	Hughes, Gertrude
Blenkush, Brian & Hazel	Diffley, John & Kathryn	Glasby, Violet	Hunt, John & Rita
Blue, Suzanne	Dilley, Bernhard & Sandra	Goihl, Elizabeth	Hunziker, John & Mary Lou
Boarman Kroos Vogel Group	Dockerty, John & Diane	Good, Alison	Huston, Dr. John
Boettcher, Lillian	Dodge Center Foundation	Gorman, Dr. Column & Una	IBM
Bolton, Jeffrey & Elizabeth	Dollerschell, Allen & Marcia	Gorman, Paul & Terry	Jackson, Sidney
Borchardt, Steve	Domaille, Mike & Nancy	Greater Minnesota Housing Fund	Jacobs, Phyllis
Borcharding, Donald & Patricia	Donna D. Jorgensen Living Trust	Greater Rochester Advocates for	Jepsen, Carl & Molly
Bouquet, Dr. Bernard & Susan	Doty, Joan	Universities and Colleges	Johnson Printing
Bowman, Angie	Dousa, Dr. Miloslava & Dr. Thomas	Greater Rochester Rotary Club	Johnson, Larry & Janet
Bowman, Jenna & Allison	Dulohery, Yvette	Gregg, Leon & Linda	Johnson, Leigh & Judy

Johnson, Randolph & Sherry	Merit Contracting, Inc.	Rogers, Michon	Tieskoetter, Paul & Barbara
Jordan, Barbara & W.C.	Merritt, Virginia	Rolsch, Steve & Linda	Tollefson, Jon & Glenda
Jorgensen, Helmer & Donna	Messick, Joseph & Arleeta	Rosener, Richard & Joanne	Tomlonovic, Cecilia
Jorstad, Lois	Meyerle, Kathleen	Rowley, Edward & Janice	Tomlonovic, Kathleen
Judd Tooke, Starr	Miller, Robert	RSM US, LLP	Tooke, Dr. Michael
Judd, Thomas	Minnwest Bank	Rustad, Angie	Tordsen, Stanley & Kathryn
Kamper, Carol & Rueben	Mintz, Jeffery & Kristy	Ryan, Bruce & Kathryn	Tully, Twillie
Karsell, Dr. Philip & Catherine	Moore, Lorna	Rybarczyk, Michael	Tuntland, Alan & Sharon
Kasson Mantorville Dollars for Scholars	Myhrvold, Amy	Sabotta, Phyllis	U.S. Bank Foundation
Keilholtz, Kim	Nelson, Dr. Audrey	Salmi, Marilyn	United Way of Olmsted County
Keller Williams Premier Realty	Nelson, Dr. Evan & Bonnie	Santrach, Dr. Paula	US Bank
Kelly, Daniel & Mary Jo	Nelson, Nancy	Scanlon, Dr. Paul & Maggie	Utz, Mark & Julia
Kelly, Thomas & Denise	Nicholson, Dennis	Schlagenhaft, Timothy	Van Dellen, Dr. Richard & Marian
Key, Cheryl	Nicolai Apartments	Schmidt, Brad	Vermeersch, Paul & Lucille
Kierlin, Robert	Nienow, Beth	Scholz, Dr. Donald	Veterans and Emergency Services Museum, Rochester, MN
Kirklin, Edward	Nigon, Bernard & Julie	Schroeder, Kathe	Vetter, Dr. Richard & Janice
Kirklin, Lynne	Norberg, Robert & Sharon	Schwartz, Don & Alice	Vig, Guy & Kara
Kirklin, Starr	Nuss, Robert & Sharon	Seeger, Ronald & Theresa	Volkmar, William & Sheri Brandvold
Kiscaden, Sheila & Richard	O'Connor, Laurie	Seegmiller, Verdon & Rose	Walters, Bret
Klampe, Shirley	Oeth, David & Gwenda	Severeid, Marjorie	Walters, Richard
Knopman, Dr. David & Dr. Deborah	Ohly Law Offices	Shannon, Larry & Dr. Wendy	Warren, Mary
Knudsen, Dag & Deirdre	Olmsted Medical Center	Sheedy, Dr. Patrick & Karen	Wasserman, Susan
Knutson Construction	Osborn, Dr. Michael & Margot	Shields, Raymond	Watson, Jerome & Cheryl
Knutson, Steve & Jean	Osmundson, Dr. Philip & Margaret	Skustad, Melisa	Weigel, Karel
Koehn, Gordon	Pacchetti, John & Sarah	Slightham, Thomas & Sue	Weis Builders, Inc.
Kolling, Susan	Padgett, William & Sharon	Sloan, Jim & Judy	Weis, Joseph & Darlene
Krehbiel, Bradley & Beth	Patton Reinecker, Phoebe	Smidt, Donald & Carol	Welder, Mary
Kruesel General Merchandise & Auction Company	Pederson, Joseph	Smith, Drs. Hugh & Aynsley	Wendland Utz, Ltd.
Kukuzke, Charlene	Pellikka, Dr. Patricia & Dr. Jay	Smith, Gary & Constance	Weston, Susan
Kurtz, J.H. & K.M.	Pelowski, Judith	Smith, Thomas & Jeanne	Wicks, John & Nedra
Kwik Trip, Inc.	Peter, Richard & Shirley	Smyrk, Carol	Wilkins, Robert & Gladys
Kyle, John	Peterson, Merle & Betty	Sommers, Richard	Williams, Tom
Lai, Jeng	Piepgas, David & Jane	Sorenson, Charles & Valerie	Williams, Vivien & Dr. David Midthun
LaRoque, Dennis & Arleen	Pingree, Ruth	Speight, Kent & Linda	Wittek, Michael
Lasker-Bickle, Inc.	Plitzuweit, Irvin & Maureen	Sperling, Steven & Shelley	Witten, Jill & Roger
Lawson, Courtney	Podulke, Michael & Stephanie	Staff Community Fund	Wollaeger, Cynthia
Layton, Gregory & Donna	Poulton, Ted & Shirley	Statkevicius, Amy	Woodford, Jennifer
Lee, Terry & Shirley	Powers, Joe	Stenehjem, Dean & Julianne	Wrobel, Amy
Letendre, Dr. Louis & Marie-France	Prakash, Dr. Udaya & Pushpa	Stenhaug, David & Sara	Yaggy, Ronald & Judith
Life Community Development Corp	Premier Bank Rochester	Stewartville Community Foundation	Yang, Crystal
Ling, Walt	Purrington, Brian & Anne	Stormer, Stephen & JoAnn	Yanish, Ronald & Dianne
Locke, Jean & G. Richard	Qualey, Betty	Streit, Frank	Ytterberg, Dr. Steven & Dr. Karen
Losness, Jon & Sue	Qualey, Bruce & Sara	Stutz, David & Sandie	Zieman, Teresa
Lovgren, Helen & Daryl	Remme, Bruce & LuAnn	Suk, Charles & Jill	Zietlow, Donald
Lovik, Nate	Restovich, Helen	Supalla, Donald & Stephanie	Zimmerman, Warren & Helen
Loving, Kristopher	Rice, Sean & Darci	Superior Companies of Minnesota, Inc.	
Luetmer, Patrick & Lisa	Richards, Thomas & Carolyn	Sutter, Kevin & Julie	
Marreel, Mark	Richardson, Paul	Swedlund, Dr. Harry & Delores	
Martin, Gregory	Richter, Dale & Barbara	Talen, James & Joyce	
Mattke, Peg & Ross	Ricketts, RK & SK	Tasler, Mark & Sheryl	
Mayo Clinic	Ricklefs, Merlin & Karen	TePoel, Harvey	
McDonah, Margaret	Rivas, Jose	Think Mutual Bank	
McIlrath, Dr. Donald & Alice	Rochester Area Chamber of Commerce	Thompson, Dave & Sherrie	
McMillin, Bill & Bonnie	Rochester Area Family Y	Thompson, Susan	
Medtronic Foundation	Rochester Area Foundation	Thomson, Jean	
Merchants Bank	Rochester Clinic PLC	Thornton, Bradley	
	Rochester Family Eye Clinic	Thornton, Steve & Nancy	
	Rochester Music Guild	Thurber, Dr. Deloran & Edith	

New Funds in 2016

Byron School District Impact Fund	Merle Peterson Donor Advised Fund	The ARC Southeastern Minnesota Donor Advised Fund
John A. Kyle Donor Advised Fund	Boys & Girls Club of Rochester, Minnesota Endowed Fund	Curley Family Donor Advised Fund
HALCON Furniture Scholarship Fund	Kevin and Julie Sutter Donor Advised Fund	Allison and Aaron Benike Family Donor Advised Fund
Chuck Handlon Century High School Chemistry Scholarship Donor Advised Fund	Dr. Gertrude M. Tyce Calvary Episcopal Church Sanctuary Donor Advised Fund	Slightam Family Foundation Donor Advised Fund
Terri & Brooks Edwards Donor Advised Fund	Dr. Francis A. J. Tyce Salvation Army Memorial Designated Endowment Fund	Superior Mechanical Endowed Donor Advised Fund
Kasson Mantorville KMTelecom Endowed Scholarship Fund	Veterans & Emergency Services Museum, Rochester, Minnesota Fund	
Kasson Mantorville Scholarship Donor Advised Fund	Beth Marie Nienow Donor Advised Fund	
Dick & Joanne Rosener Donor Advised Fund		

2016 Honor and Memory Gifts

Gifts were given as memorials in memory of the people listed below:

Helmer Jorgenson	Norman Fox
Stephen Baard Flesche	Dale Heyn
Mike Ladin	Gary and Charlotte Sutter
Elizabeth LaRoque	Alta Beckman
Natalie Thornton Webb	Richard Henslin
Mike Podulke	Scott Hosier
Alan Calavano	Tom Hosier
Matt Hanson	Harley Flathers
Sandra Price	Ray Price
Winnifred Papenfuss	Michelle Ulve
Betty Sande	Ryan Bierlin
William Carr	Gene and Yvonne Bartz
Rosanna and Jack Gohl	
Janice Heitman	<i>Gifts were given in honor of the people listed below:</i>
Gordon K. Branes	James Talen
Paul Dilley	Patricia Keith
Henry Tvedt	Harold Christensen
Lee Blenkush	Hugh Smith
Tom Ronne	Hugh and Aynsley Smith
Dr. Robert Dinapoli	Jane Champion
Margaret (Peg) Herrell	Grandchildren
Al Koenig	Friends at Mayo Clinic
John Tobiason, Serviceman	Heidi (Sutter) Coleman
Michael Klampe	Heather Sutter
E. Starr Judd	Bruce and Katie Ryan
Helen B. Judd	Dag Knudsen and Deidre Flesche
Patricia Judd	Phyllis D. Layton
Wendy Hillesland Coe	Allison Harvey
	Judd Family

Heritage Society Members

Neil Anderson	Wallace Merritt
Dick & Judy Argue	Harold & Shirley Miller
John Bakke	Thomas & Patricia Miller
William & Mary Ann Boyne	Mary Elizabeth Mussey
Allison and Aaron Benike	Audrey M. Nelson, MD
Margaret Breise	James & Jean Newcomer
Jane Champion	Beth Marie Nienow
Dr. Peter & Carol C. Carryer	David & Gwen Oeth
Jim & Sue Clausen	Joe Powers
Al & Ann DeBoer	Bruce & Sara Qualey
Ms. Janet Denny	Christine Sadowski
Dr. Joseph & Lois Duffy	Al & Julie Schafer
Edward Engel	Robert Schoenfelder
Dr. & Mrs. Ferguson	Larry & Wendy Shannon
Barbara Flasch	Jim & Judy Sloan
Mike & Joy Fogarty	Drs. Hugh & Aynsley Smith
Toni A. Hanson	Jim & Joyce Talen
Paul & Rebeca Harkess	Steve & Nancy Thornton
Richard Orvold & Marita Heller	Al & Sharon Tuntland
Marianne Hockema	Amy Waugh
Mr. Roy L. Hoffman	Karel Weigel
John & Rita Hunt	Joseph Weis
Mrs. Lois A Jorstad	Joyce Wenz
ES Judd	Nedra & John Wicks
Dan & Mary Jo Kelly	Ronald & Dianne Yanish
Portia Kendall	
Lyle & Nancy Kuhlmann	
Glenn & Ella Van Laningham	
Dr. Donald D. Layton	
Jon & Sue Losness	

Boys & Girls Club of Rochester Believes in the Power of Endowments

In December of 2016, the Board of Directors of the Boys & Girls Club of Rochester Minnesota approved the creation of a Nonprofit Endowment Fund at the Rochester Area Foundation. Executive Director Jodi Millerbernd explains why a Rochester Area Foundation endowment was a good fit.

"An endowment fund signifies planning for the future of Boys & Girls Club. We have grown significantly in the past few years and it is time to plan for the next generation of Club members. We are a strong organization built upon the collective work of this community. We owe it to our members and Rochester to be a sustainable organization for many years to come. Each year, Boys & Girls Club of Rochester raises its annual budget. As our budget grows, so does the demand for fundraising. An endowment will allow us to support new programs and initiatives while sustaining existing ones." She went on to explain, "The staff at RAF make it incredibly easy to start an endowment. We trust the staff and board will do their best to ensure Boys & Girls Club's funds will be well invested. We have a responsibility to our own investors to uphold our mission and expend resources with integrity."

Birthdays are Better in a Home



The First Homes Program helped Kayla purchase her first home for her family. The thing she's most excited about? "I get to throw birthday parties for my kids and their friends at our home. I've never been able to do that before."

Kayla Giles and her children Taylynn (7), King (3), and Royal (1) moved in to their southeast Rochester home in September. After living in a mobile home for some time, Kayla knew she needed more space for her family.

After looking for something affordable that fit her family's needs for awhile, Kayla was introduced to Shirley Lee, First Homes Program Officer, and began the process to be a First Homes Homeowner. According to Kayla, "Providing all the documentation for the loan was the hard part, working with Shirley and First Homes was so easy and enjoyable."

Kayla is excited to make the house her own by doing all the things you can't do when you're renting or in a mobile home - painting walls, putting on a deck,

finishing previously unfinished space - and of course, hosting birthday parties for her children and their friends in the yard.

First Homes is a Community Land Trust

A Community Land Trust (CLT) creates affordable housing by taking the cost of land out of the purchase price of a home. It keeps housing affordable for future buyers by controlling the resale price of houses on CLT land through a ground lease and resale formula. Home owners leasing CLT land under their home enjoy the security, control, tax advantages and ability to build equity just like any home owner. If they sell their home, the resale formula insures that the home remains affordable for the next family.



Joe Weis: Building a Legacy of Affordable Housing

Since 1971, Joe Weis has led Weis Development Corp. to build almost 30 low-income housing projects in Rochester and elsewhere in Minnesota. He also has long been a key figure at Weis Builders, one of Rochester's top construction firms, founded by his father in 1939.

His latest affordable-housing project, being built at First Avenue and Fifth Street Northwest, stands out among the many recent high-end construction projects in Rochester as one of the only ones that can be called affordable.

Every year, Weis and his staff identify a location to propose an affordable-housing project and apply to the Minnesota Housing Finance Agency to qualify for its tax credit program. The deadline to apply is in June. Many developers apply and the competition is always stiff. By October, the state selects a handful of projects to receive the valuable tax credits.

While no housing project is simple, competing for the affordable housing tax credits is a long and complicated process with pages of detailed criteria used to judge each proposal.

According to the Post-Bulletin, "It's a tightrope Weis has mastered. He built his first affordable housing project - Rochester Square - with backing from the federal Housing and Urban Development agency in 1971."

While affordable housing is "a profit center" for his firm, Weis concedes there are a lot easier ways to make money building housing. However, building good places for low-income and sometimes homeless people to live offers more rewards than just profit.

Steve Borchardt, Housing Initiative Director for the Rochester Area Foundation sings Weis' praises, "Joe Weis is a community treasure and a housing hero. Many people have a quality residence due to the dedication

of Joe Weis. He had been a leader and strong advocate for creating affordable housing for folks that work to provide the services we all rely on every day."

In addition to his work with affordable housing, Joe Weis is a member of the Rochester Area Foundation's Heritage Society. Heritage Society Members have committed to leaving a portion of their estate to the Rochester Area Foundation.

The Weis companies now do hundreds of millions in business a year. While they have offices and a strong presence in the Twin Cities, Rochester is still the heart of the business.

In a Post-Bulletin article published in December of 2016, Weis said, "I love Rochester. It's a good, growing town."



BETTER COMMUNITIES FUND



WE BELIEVE IN LEGACIES

By giving to a community endowment, your investment grows over time and leaves a legacy instead of being a one-time gift to a specific organization.



WE ARE FLEXIBLE

Investments in the Better Communities Fund are highly flexible and available to meet the breadth of community needs – including future needs that may not be imagined.

HOW DOES A COMMUNITY ENDOWMENT WORK?

The Rochester Area Foundation is unique in that you don't give to us – you give through us.

We are caretakers of the community endowment, called the Better Communities Fund. Endowments are permanent funds in which the principal is preserved and invested, with a portion of the earnings distributed annually for charitable purposes.

Endowments carry an inherent power to provide for community needs in perpetuity through continued growth. Over time, distributions exceed the original gift, while the fund balance continues to grow, thanks to responsible management.

Rochester Area Foundation grants are awarded from the Better Communities Fund with support from private funds held at the Rochester Area Foundation.



WE ARE ROOTED IN GROWTH

We have a strong belief in the power of endowments to maximize gifts and sustain communities in the long-term. The Better Communities Fund supports the Foundation's programming and the Better Communities Grants.



WE HARNESS COLLECTIVE GENEROSITY

Anyone can give to the community endowment, and ALL nonprofits are eligible to receive grants from the Better Communities Fund.

WHY NOW?

The increase in community needs has outpaced the growth of our endowment. We are making a concerted effort to grow the Better Communities Fund so we can continue to meet the ever-growing needs of the community now and in the future.

Right now, the Better Communities Fund has a balance of about \$4.5 million. That sounds like a lot of money, but because the Rochester Area Foundation can only use the investment income every year for grants and programming, it's not as much as you think. Other communities of similar size have significantly larger endowments to help them address more community needs every year.

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The professional & passionate volunteers that are caretakers of our mission and resources.



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Mark Utz,
Vice Chair



Barbara Jordan,
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Brad Schmidt,
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Hugh Smith,
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Don Supalla



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Greg Layton



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Denise Kelly



Walt Ling



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Mary Ehmke

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Housing Initiative
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Nancy Domaille	Jennings O. Johnson	Charles W. Pappas	Don Sudor	

2016 Grants by Impact Area

Health & Human Services  \$680,239 248 grants	Youth & Education  \$438,763 176 grants	Religious  \$211,341 76 grants
Community Development  \$199,434 72 grants	Arts & Culture  \$54,997 31 grants	Environment & Animal Welfare  \$52,630 27 grants

Totals

\$1,637,406 || 630 grants

2016 Financials At-a-Glance

 5.5% Increase in Total Assets	 \$2,962,287 Total Gifts & Pledges	 6.0% 5-year average investment return
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*Consolidated Financial Report for***Rochester Area Foundation & Affiliates***December 31, 2016 and 2015*

Assets	2016	2015
Cash and cash equivalents	\$1,356,026	\$1,233,462
Interest receivable	\$12,899	\$12,899
Pledges receivable, net	\$355,812	\$542,112
Investment in marketable securities	\$26,953,666	\$25,330,984
Beneficial interest in trust held by others	\$502,100	\$533,206
Loans receivable, net	\$2,133,346	\$2,478,153
Land and building, net	\$1,614,840	\$245,038
Leasehold improvements and equipment, net	\$831,350	\$876,069
Other assets	\$135,647	\$126,108
Land held in Community Land Trust	\$7,943,584	\$7,953,584
Total Assets	\$41,839,270	\$39,331,615

Liabilities

Line of Credit		\$201,794
Accounts payable and accrued expenses	\$16,369	\$113,499
Grants payable	\$67,700	\$72,976
Program assets held for others	\$579,891	\$540,483
Annuities payable and unitrust obligations	\$628,459	\$642,520
Notes payable	\$564,185	\$567,686
Mortgage payable	\$727,379	
Total Liabilities	\$2,583,983	\$1,937,164

Net Assets

Unrestricted	\$24,286,427	\$22,561,248
Temporarily restricted	\$13,047,216	\$12,709,765
Permanently Restricted	\$1,921,644	\$1,921,644
Total Net Assets	\$39,255,287	\$37,192,657

Total Liabilities and Net Assets	\$41,839,270	\$39,129,821
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Audit Status - financial results for the year ended December 31, 2016, have not been audited at the time of printing. The audited 2016 financial report will be available at the Rochester Area Foundation and on the website upon completion of the audit.



ROCHESTER AREA FOUNDATION

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