



Rochester Area  
Foundation

# ROCHESTER AREA FOUNDATION

# ANNUAL REPORT

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# MESSAGE FROM ROCHESTER AREA FOUNDATION LEADERSHIP



Dear Friends,

This has been a year of growth and change for Rochester Area Foundation. We're thrilled that Jennifer Woodford joined the Foundation as its President in June, and we're pleased with our market growth of 15.3%. This, along with bequests, the establishment of 20 new funds, and generous gifts from annual donors, built our endowment and our confidence. Thank you for your support.

Our development efforts and positive financial picture are only part of our story. Our grantmaking and leadership work drive Rochester Area Foundation, and we hope they inspire you, too. In this report, you'll read about a few local nonprofits and the grants they received. Last year we awarded a record \$2.96 million dollars in grants and scholarships. We are confident that these nonprofits are improving people's lives and helping build better communities for all.

Wendy Shannon  
Chair, Board of Trustees

Jennifer Woodford  
President

## LOOKING AHEAD | 2018 GOALS



### BUILDING PHILANTHROPY

Anyone can be a philanthropist! Whether you're interested in giving \$200 or \$2 million, we're your trusted experts on how to achieve maximum impact with your dollars.



### COMMUNITY AWARENESS

The more people that know about who we are and what we do, the more we can achieve. We want to find more ways to engage all of you in building better communities for all!



### UPGRADED TECHNOLOGY

In 2018 we're making a significant investment in our website and fund, grant, and scholarship software, making it easy for you to interact with your foundation.

# MEET THE TRUSTEES



**WENDY SHANNON**



**MARK UTZ**



**GREG LAYTON**



**DENISE KELLY**



**BRAD SCHMIDT**



**LISA CLARKE**



**PAUL GORMAN**



**MARY EHMKE**



**LARRY KOSHIRE**



**WALT LING**



**KATHRYN LOMBARDO, MD**



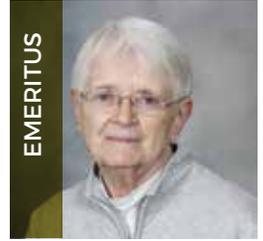
**STEVE SPOHN**



**DON SUPALLA**



**KAREL WEIGEL**



**JANE CAMPION**

# MEET THE STAFF



**Jennifer Woodford**  
President



**Steve Borchardt**  
Housing Initiative Director



**Misha Hanson**  
Finance Officer



**Shirley Lee**  
First Homes Program Officer



**Amalie Frankel**  
Philanthropy Officer



**Jane Angelone**  
Grants and Nonprofit Relations Officer



**Carrie Moscho**  
Communications Manager



**Amanda Pelley**  
Administrative Services Manager

# COMMITTEE MEMBERS

## Executive Committee of the Board

Wendy Shannon, Chair  
Mark Utz, First Vice Chair  
Greg Layton, Second Vice Chair  
Denise Kelly, Secretary  
Brad Schmidt, Treasurer

## Finance Committee

Paul Gorman, Co-Chair  
Brad Schmidt, Co-Chair  
John Benike  
Dan Berndt  
Jim Sloan  
Leigh Johnson  
Hugh Smith  
Todd Heather  
Craig Wendland  
Angie Rustad  
Mandie Anderson  
Eric Alleckson  
Greg Layton

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Denise Kelly  
Steve Spohn

## H.R. Committee

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Becky Pautz  
Kathy Meyerle  
Lisa Ketterling

## Grant Distribution Committee

Don Supalla, Chair  
Karel Weigel  
David Stenhaus  
Sharon Van De North  
Kay Karsell  
Carol Carryer  
Jean Locke  
Meghan Snyder  
Chris Nelson  
David Herder  
Jade Sadosty  
Donna Greason  
Ginger Holmes  
Jane Campion

## Technology & Systems Committee

Walt Ling, Chair  
Jim Sloan  
Joanne Rosener  
Mary Ehmke  
Mark Bencoter

## Building & Grounds Committee

Don DeCramer, Co-Chair  
Larry Koshire, Co-Chair  
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Mike Benike  
Jamey Shandley  
Dave Riechert

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Courtney Bergey  
Steve Borchardt  
Marsha Hall  
Kristina Hesby  
Kim Keilholtz  
Shirley Lee  
Nate Lovik  
Kristopher Loving  
JoMarie Morris  
Wendy Shannon  
Don Supalla  
Therese White  
Jerry Williams

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Joe Power, Chair  
Mary Jo Majerus  
Jose Rivas  
Susan Strandberg  
Laura Helle  
Greg Layton  
Jim Mack  
Gary Smith  
Tom Wentz

## First Homes Board of Directors

Jose Rivas, Chair  
Mike Becker  
Karli McElroy  
Natalie Jones  
Sheila Kiskaden  
Jamie LeDent  
JoMarie Morris  
Steven Spohn  
Chris Stroud  
Karel Weigel  
Kim Woodruff  
Michele Sneed

# PAST TRUSTEES

Earl R. Baker  
Betty A. Beck  
Abdul Bengali  
John Benike  
Dan Berndt  
Robert A Bezoier  
Art Birdseye  
Angie Bowman  
William C. Boyne  
Robert S. Brown  
Nancy Brubaker  
Michael Bue  
Dorothy Callahan  
Jane Campion  
Rick Colvin  
Lance Davenport  
Allan DeBoer  
Nancy Domaille  
Joe Duffy  
Vera M. Elgin  
Charles Elliot  
Ann N. Ferguson  
Joy Fogarty

Jean H. Freeman  
Claude Glatzmaier  
David Griffin  
Walter T. Haesley  
Paul Harkess  
Harry J. Harwick  
John H. Herrell  
Marianne Hockema  
Les Horntvedt  
Isabel Huizenga  
Theodore H. Johnsen  
Clifford M. Johnson  
Jennings O. Johnson  
Leigh J. Johnson  
Barbara Jordan  
Carol Kamper  
Mary Jo Kelly  
Eleanore Kirklin  
Michael Klampe  
Edward LaPointe  
Jean Locke  
Jon Losness  
Theodore G. Martens, MD

Paul J. McCue  
Anna McGee  
Kenneth McGhie  
Mike McNeil  
R.D. Mussey, MD  
Sue M. Norris  
James M. O'Conner  
Paul Olander  
Charles W. Pappas  
Harold E. Payne  
Dan Penz  
Carolyn Piepho  
Joe Powers  
Raymond Pruitt, MD  
Bruce Qualey  
Jose Rivas  
Ray L. Roberts  
Oscar C. Ronken  
Al Schafer  
Alfred Schumann  
Fred W. Schuster  
Ron Seeger  
Hugh Smith, MD

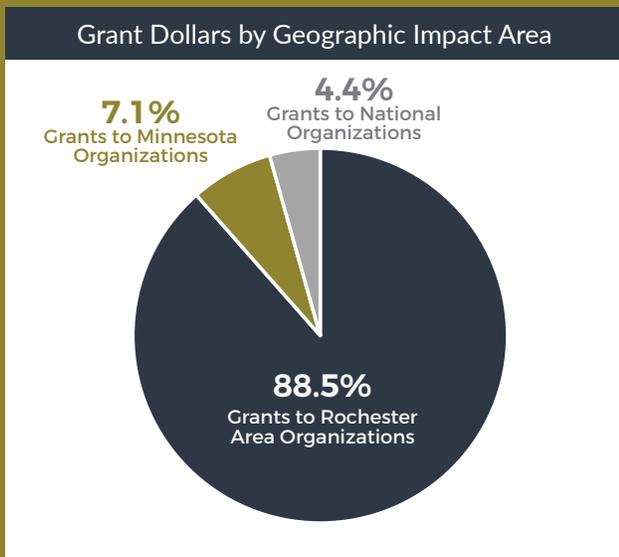
Robert Smoldt  
Herbert M. Stellner, Jr.  
David Stenhaus  
Howard T. Stewart  
Marilyn Stewart  
Don Sudor  
James L. Talen  
Sheryl Tasler  
Curtis L. Taylor  
Harold Thompson  
Margaret S. Thompson  
Al Tuntland  
John Wade  
Charles R. Von Wald  
Craig Wendland  
Tom Wentz  
Howard E. West  
Nedra M. Wicks  
Vivien Williams  
Barbara B. Withers  
John Withers  
Ralph Wright, Ph.D.  
Kenneth Zubay

# 2017 GRANTS BY IMPACT AREA

<p>Youth &amp; Education</p>  <p><b>\$1,296,332</b> 223 grants</p>	<p>Health &amp; Human Services</p>  <p><b>\$1,095,581</b> 307 grants</p>	<p>Religious</p>  <p><b>\$276,963</b> 84 grants</p>
<p>Community Development</p>  <p><b>\$82,559</b> 26 grants</p>	<p>Environment &amp; Animal Welfare</p>  <p><b>\$81,775</b> 45 grants</p>	<p>Arts &amp; Culture</p>  <p><b>\$79,262</b> 60 grants</p>

Grant Totals

**\$2,912,472 | 745 grants**



Organizations Receiving Grants

**292**

Organizations  
Benefitted from Funds Held at  
Rochester Area Foundation

# THANK YOU.

The Trustees and Staff of Rochester Area Foundation wish to give our most heartfelt thanks to the 1,023 generous donors who make everything we do possible.

Your contributions allow us to grow the charitable assets of the community, give high-impact grants to worthy nonprofits, find solutions to our workforce housing challenges, provide programming for up-and-coming philanthropists, and build strong community partnerships that are shaping the future of the Rochester area.

We gratefully acknowledge and thank each of you on our website at [rochesterarea.org/thankyou](https://rochesterarea.org/thankyou).

**\$2,887,071**  
Total Gifts and Pledges

**1,134**  
Number of Gifts

**284**  
Charitable Funds  
are held at RAF

# DR. GEORGE L. AND DOROTHY H. I. ALLEN ARE COMMITTED TO LIVING GENEROUSLY

“Rochester sure has changed a lot,” Dr. Allen said and chuckled. He should know - he and his wife, Dorothy have called Rochester home for over 50 years.

Dr. George L. Allen, Sr. and his wife, Dorothy H. Allen, first arrived in Rochester for his residency at Mayo Clinic. After completing his residency, the army shipped him off to Ft. Sam Houston, and then to the Vietnam war.

When Dr. Allen returned from Vietnam, he reached out about an open position in Rheumatology at Mayo Clinic. “From there on out, it’s history,” said Dr. Allen.

Dorothy and Dr. Allen went on to raise five children in Rochester. “It really is a special town - it influenced me in so many ways,” said Dr. Allen, “I saw the impact that charitable giving - both locally and abroad - could have.”

In 2015, Dr. and Mrs. Allen’s attorney suggested they open a donor advised fund at the Rochester Area Foundation. Dr. Allen said, “I didn’t know much about it at first, but it’s worked out well for us.”

For people who give to many different organizations like the Allens, a donor advised fund can streamline the giving process and help philanthropic dollars go further.

The Allens received a tax deduction when they opened



**“We have a sign next to our bed. It says, ‘You make a living by what you get, you make a life by what you give. That’s guided our giving philosophy for years.’”**

their donor advised fund, and can recommend grants from the fund to any charitable nonprofit in the United States.

Through their donor advised fund, Dr. George and Dorothy Allen have given to many organizations. Their church, Boy Scouts of America (Dr. Allen served on the national board for

a number of years), Channel One Regional Food Bank, and Ronald McDonald House are a few that are especially close to their hearts.

“We have a sign next to our bed. It says, ‘You make a living by what you get, you make a life by what you give. That’s guided our giving philosophy for years.’”



## LASKER JEWELERS IS EMPOWERED TO GIVE BACK

“With the help of the Foundation, we’re empowered to give back to our community in a meaningful and personal way. - Melisa Skustad

Nicole Lasker and Liz Falkner, the owners of Lasker Jewelers, still call Eau Claire, Wisconsin, where Lasker Jewelers was founded, home. They care deeply about that community, and wanted to give employees in their Rochester store opportunities to give back to their community as well.

Nicole and Liz worked with Rochester Area Foundation to open a donor-advised fund that the employees of the Rochester store control. Lasker Jewelers received tax benefits for their donation, and the employees can recommend grants to nonprofits as frequently as they’d like from that fund.



Liz Falkner and Nicole Lasker

“The reaction from staff has been extremely positive,” said Melisa Skustad, Operations Manager for Lasker Jewelers in Rochester, “We’ve all been brainstorming and making suggestions, trying

to figure out how to impact the causes that our customers and our staff care about.”

To learn more about local nonprofits, members of the staff attended the Grant Distribution Breakfast at Rochester Area Foundation and were pleased to learn about all of the worthy projects they could support.

Melisa added, “We appreciate that Nicole and Liz care deeply about nonprofits, and are empowering us to support this community that we call home.”

# HERITAGE SOCIETY

Members of Rochester Area Foundation Heritage Society are individuals who have given, or who have indicated their intent to give, to the Rochester Area Foundation upon their passing.

## Creating a legacy

With the addition of a provision in your will or trust, you can designate the Rochester Area Foundation to receive a percentage or specific amount from your estate, or take advantage of more sophisticated strategies—like giving instruments that provide an income stream to meet current financial needs.

## Family or community? You don't have to choose

If current financial, business or family obligations are keeping you from charitable giving, rest assured that you don't have to choose between family and charity. You can serve both with a planned gift, possibly saving your family money by decreasing estate and inheritance taxes.

You may elect today how your gift will be used in the community after your lifetime by completing a non-binding Heritage Society Agreement. This revocable agreement allows you to name the fund your gift will create, identify any fund advisors, specify your charitable interest areas and even express a desire for anonymity. If you change your mind at any time, we can simply amend the agreement without any costs or legal assistance.



## HERITAGE SOCIETY MEMBERS

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

## NEW FUNDS

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Kathryn and Phillip Lombardo Donor Advised Fund  
 George and Carolyn Heyne Donor Advised Fund  
 Rochester Olmsted County Law Enforcement  
 Memorial Association Donor Advised Fund  
 Tim & Cris Fischer Donor Advised Fund  
 Dodge Center Foundation-Jessica Marie Arnold  
 Donor Advised Fund  
 Ironwood Springs Christian Ranch Donor  
 Advised Fund  
 Boys & Girls Club of Rochester, MN  
 Endowed Fund  
 Beverly Nelson Arts Education Donor  
 Advised Fund

Kris Brown Memorial Donor Advised Fund  
 Donald & Barbara DeCramer Donor Advised Fund  
 Ron & Marsha Durst Scholarship Fund  
 Post Family Donor Advised Fund  
 Forrest & Faye Sargent Donor Advised Fund  
 M.P. Krieger Donor Advised Fund  
 William & Heidi Oehler Donor Advised Fund  
 Weis Family Donor Advised Fund  
 Patrick and Teri Deutsch Donor Advised Fund  
 Ron and Marsha Durst Donor Advised Fund  
 Lasker Jewelers Community Donor Advised Fund

## TRIBUTE GIFTS

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### In Memory:

Tim Stoddart  
 Nancy Kuhlmann  
 Barb Plenge  
 Gary and Charlotte Sutter  
 Francisca Uzonwanne  
 David Ebel  
 Alan W. Manning  
 Lee Blenkush, Paul Dilley,  
 and Henry Tvedt  
 Florence Norman  
 Patricia Judd  
 George Restovich  
 Paul Engel  
 Wyatt McCoy  
 Roy Langworthy  
 Natalie Thornton Webb  
 Elizabeth LaRoque  
 Kathryn Meyer Schmidt

Sue Schuett  
 Rodney Mendenhall  
 Michele Schmidt  
 Ted Trutna  
 Evelyn and Herb Yanish  
 Lois Jorstad  
 Walt and Arleen Whit-  
 comb  
 Pat Hadler  
 James Henry Martin  
 Beverly Nelson  
 Marguerite Smith  
 Don Sudor  
 Joyce A. Talen  
 Alma Anderson  
 Charlotte Mortenson  
 Mike Podulke  
 Mary Jane Schmitt  
 Douglas Pflaum

Ralph Lentz  
 Stella Nelson  
 Dagne Christenson  
 Marsha Durst  
 Phil Henoch  
 Craig Garrett  
 Bonnie Hill  
 Dr. and Mrs. J.M. Stickney  
 Mike Ladin  
 Pete Prow  
 Joseph E. Stanich  
 Jack and Rosanna Goihl  
 E. Starr Judd  
 Herb Haack  
 Ray Parrott  
 Mrs. Young S. Ryu  
 Allen Koenig

### In Honor:

Barbara Domaille  
 My Friends at Mayo Clinic  
 Barb Plenge  
 Heather Sutter  
 Heidi (Sutter) Coleman  
 Our Parents and Their  
 Families  
 Deirdre Flesche  
 My Grandchildren  
 Tami Lynn Thatcher  
 Ramona Hoaglund  
 Cynthia Daube  
 Karel Weigel  
 Rob Gregory of Rochester  
 Toyota  
 Jane Campion  
 Vicki Friedman  
 Ann Fahy-Gust



## **JEREMIAH PROGRAM IS TACKLING POVERTY TWO GENERATIONS AT A TIME**

Jeremiah Program is a unique, nationally recognized program that helps young families headed by single mothers to move from poverty to prosperity through provision of affordable and safe housing, a supportive community, life skills training, educational support, and on-site early childhood education.

During their exploration and pre-development phases,

Rochester Area Foundation provided Jeremiah Program with free space in the Nonprofit Incubator and for meetings, and \$27,000 in competitive grants.

Rochester Area Foundation Grants Officer Jane Angelone said, "As a community foundation, one of our major functions is nurturing nonprofits whether they're just getting started, or looking for ways to evolve and grow."

Jeremiah Program will begin serving local families in the fall of 2018, and break ground for its Rochester campus in the summer of 2019.

Executive Director JoMarie Morris said, "The Rochester Area Foundation has been an invaluable partner in helping us launch a local Jeremiah Program to serve low income single mothers and their children in our community."

Since 2015, when expanding Jeremiah Program to Rochester was a mere grass roots vision of local leaders, until the present day as we launch our program, Rochester Area Foundation has supported us every step of the way. - JoMarie Morris, Jeremiah Program Rochester

# HIGH TECH KIDS

## ARE BUILDING SKILLS WITH LEGOS



The Hydro Bears from Byron are pictured with their medals and judges award for both Innovative Solution Research and Strategy and Innovation.

High Tech Kids is a Minnesota nonprofit that delivers fun, hands-on science, engineering, and technology programs and events that inspire kids in their formative years.

High Tech Kids offers programs for students in Kindergarten through High School, but their most popular program is the First Lego League offered to students in 4th through 8th grade.

Teams of up to ten students organized by volunteer coaches collaborate to build and program an autonomous robot to score points on a thematic playing surface (the Robot Game) and create an innovative solution to a problem correlated to the

yearly theme (the Project). Teams participate in competitions that can eventually lead to the national level.

One of the regional competitions has been held in Rochester for over ten years, and teams in the area have consistently done quite well.

Rochester Area Foundation awarded High Tech Kids \$5,000 to support training for coaches, equipment rental, program supplies, and technology.

Cheryl Moeller, Executive Director of High Tech Kids said, "Students figure out how to begin programming the robot pretty quickly, but they also

learn valuable workplace skills like team communication, public speaking, conflict resolution, and how to research and problem solve.

It's so inspiring to me that we've gone from 12 teams 20 years ago, to having over 7,000 students participating in Minnesota. All of those students are gaining confidence in STEM skills, and are supported by over 2,000 volunteers that make this program work.

Grants like the one from Rochester Area Foundation allow us to keep participant costs down and grow the program."

# 2017 ORGANIZATIONS RECEIVING GRANTS

125 Live	Calvary Episcopal Church	DonorsChoose.org	Houston Humane Society
180 Degrees	Cambodian Children's Fund	Dorothy Day Hospitality House	Institute for Shipboard Education
A Rotta Love Plus	Camp Olson YMCA	Dover Eyota Dollars for Scholars	Iowa State University
Ability Building Center	Cannon River Watershed Partnership	Duke University	Ironwood Springs Christian Ranch
Adore Ministries	Catholic Church of St. John	Eagles 5th District	Jefferson Elementary School
AFP Southern Minnesota	Catholic Foundation of Southern Minnesota	Elder Network	Jeremiah Program - Rochester
Afton Historical Museum	Center City Housing	Exercisabilities	Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties
Aldo Leopold Foundation	CentraCare Health Foundation	Expressions of Hope Foundation	Jewish Federation of Greater St. Paul
Aldrich Memorial Nursery School	Central Reform Congregation	Families First	Jewish National Fund
ALS Association Minnesota	Century High School	Family Means	Join the Journey
Alzheimer's Association	Channel One Regional Food Bank	Family Promise	Junior Achievement of the Upper Midwest
Alzheimer's Association MN ND Chapter	Chatfield Public Schools	Father Woody's Haven of Hope	JustFaith Ministries
American Cancer Society	Children's Minnesota Foundation	Feed My People	Kasson-Mantorville Schools
American Cancer Society - North Iowa	Choral Arts Ensemble of Rochester	First Homes	Kellogg Middle School
American Cancer Society Sandra Schulze Hope Lodge	Chosen Valley Community Foundation	Food for the Poor	KM Care & Share Charity Fund
American Heart Association	Christ United Methodist Church	Friendly Hills Middle School PTA	KSMQ Public Television (QTV)
American Jewish Joint Distribution Committee	Christmas Anonymous	Friends Journal	Lake Forest College
American Jewish World Service	Church of St. John the Evangelist	Friends of Oxbow	Lake Zumbro Forever
American Red Cross	Church of the Red Rocks	Friends of the Farmer's Market	Lanesboro Arts Center
AmeriCares	Church of the Savior	Georgetown University	Legal Assistance of Olmsted County
Animal Allies Humane Society	City of Dodge Center	Gift of Life Transplant House	LifeSource
Apple Tree Dental	Civic League Day Nursery	Give Kids the World	Lift for Life Academy
Arbor Day Foundation	Coldwater Foundation for Leadership & Community Development	Gloria Dei Lutheran Church	Listos Preschool and Childcare
ARC of Minnesota	College of St. Benedict	Good Earth Village	Lourdes Foundation
ARC Southeastern Minnesota	Common Dreams	Greater Rochester Area University & Colleges	Luther Seminary
Archdiocese of St. Louis	Community Dental Care	Greater Rochester Rotary Foundation	Lutheran Social Services
Arthritis Foundation	Community Food Response	Growing Home	Madonna Living Community Foundation
Autism Society of America	Community Presbyterian Church	Guardian Angels Catholic School	Mayo Cancer Center
Baltimore School for the Performing Arts	Compassionate Ocean Dharma Center	Habitat for Humanity	Mayo Clinic
Bear Creek Services Foundation	Compassionate Rochester Covenant House	Hamline University	Mayo Clinic Foundation
B'nai Israel Synagogue	Dakota State University Foundation	Hands for Humanity	Minnesota Adult & Teen Challenge
Bolder Options	Direct Relief	Harvest Church	Minnesota Assistance Council for Veterans
Bolton Refuge House, Inc.	Dodge Center Aquatic Center	Hiawatha Homes Foundation	Minnesota Children's Museum of Rochester
Boy Scouts of American Gamehaven Council	Dodge Center Community Foundation	High Tech Kids	Minnesota Humane Society
Boys & Girls Club - Bemidji	Dodge Center Library Foundation	Highlands Community Church of Scottsdale	Minnesota Land Trust
Boys & Girls Club of Rochester	Dodge Center United Methodist Church	History Center of Olmsted County	Minnesota Private College Fund
Brains Together for a Cure		Holy Anargyroi Creek Orthodox Church	Minnesota Public Radio
BrightFocus Foundation		Holy Spirit Catholic Church & Holy Spirit Elementary School	
Bring Back the Bell		Hope Seeds, Inc.	
Byron High School			
Byron School District #531			

**Rochester Area Foundation gave out grants to the following organizations from our Better Communities Fund and from donor-held funds. Many received multiple donations. We thank our donors for making this impact possible.**

Minnewaska Laker Foundation	Quaker Universalist Fellowship	Shannon O'Hara Foundation	The Rotary Club of Rochester Foundation
Mission 21	Quarry Hill Nature Center	Sharing & Caring Hands	The V Foundation for Cancer Research
Montessori Center of Minnesota	Raise the Net	Sisters of St. Francis	The Wilderness Society
MPN Research Foundation	Redwood Empire Food Bank	Society of St. Vincent de Paul - Rochester Council	Thomas Irvine Dodge Nature Center
NAMI Southeast Minnesota	Resounding Voices	Society of St. Vincent de Paul - St. Francis	Twin Cities Public Radio
Narramore Christian Foundation	Right Sharing of World Resources	Soldier's Field Veterans Memorial	Union Gospel Mission Association of St. Paul
National Eagle Center	River Valleys Girl Scouts	Somalia Rebuild Organization	United Methodist Church of Kasson
National Multiple Sclerosis Society - Greater Carolinas Chapter	Riverside Elementary School	Soulumination	United Way of Dodge County
National Park Foundation	Rochester Area Family Y	South Central Service Cooperative	United Way of Greater St. Louis
National Parks Conservation Association	Rochester Area Habitat for Humanity	South Dakota State University	United Way of Olmsted County, Inc.
New Life Family Services	Rochester Art Center	Southern Minnesota Initiative Foundation	University of Iowa Foundation
Next Chapter Ministries	Rochester Arts & Cultural Trust	Special Olympics Minnesota	University of Notre Dame
Oasis Pregnancy Center	Rochester Catholic Schools	Special Olympics Minnesota - Duluth	University of South Dakota
Official Love Community Organization	Rochester Chamber Music Society	Spider Chain of Lakes Association	Valley of Rochester Scottish Rite Children's Foundation
Olmsted County	Rochester Civic Music	Sports Mentorship Academy	VFW Foundation
OMC Regional Foundation	Rochester Community & Technical College	St. Cloud State University Foundation	Warren Miller Performing Arts Center
Orthopaedic Foot and Ankle Foundation	Rochester Friends Meeting	St. Francis of Assisi Church	Washington University
Owatonna Foundation	Rochester Hockey Association	St. Francis School	Wellness House
Parks and Trails Council of Minnesota	Rochester Math Club	St. James Coffee	Wellspring for the World
Partners for Affordable Housing	Rochester Music Guild	St. John Vianney Roman Catholic Parish	White Bear Unitarian Universalist Church
Partnership for Youth	Rochester Parks & Recreation Department	St. John's Lutheran Church	Wing House
Paws and Claws Humane Society	Rochester Public Library	St. Louis Area Food Response	Winona Health Foundation
Placerville Church Camp	Rochester Rotary Risers	St. Luke's Episcopal Church	Women's Shelter, Inc.
Planned Parenthood of Minnesota/North Dakota/South Dakota	Rochester Swimming Inc.	St. Olaf Heritage Association	Wounded Warrior Project
Pleasant Prairie Cemetery	Rochester Symphony Orchestra & Chorale	St. Peter's Episcopal Church	Young America's Foundation
Poblo International	ROCLEMA	St. Philip the Deacon Lutheran Church	Youth Outreach United
Pope Paul VI Foundation	Ronald McDonald House	St. Pius X Catholic Church	Zumbro Lutheran Church
PossAbilities of Southern Minnesota	RT Autism Foundation	Stewartville Area Community Foundation	Zumbro Valley Audubon Society
Poverello Foundation	Saint John's University	The Arthritis Foundation	Zumbro Valley Health Center
Prisoner Visitation and Support	Salute to the 4th	The Congregational Church UCC	Zumbro Valley Medical Society
Proctor Area Churches Together	Salvation Army	The Leukemia & Lymphoma Society	Zumbro Watershed Partnership
Project Legacy	Salvation Army Northern Division	The Nature Conservancy	
Project Zawadi	Save the Children Federation, Inc.	The Navigators	
Providence Academy	SE Minnesota Youth Orchestra	The Reading Center	
	Seasons Hospice		
	Seeds of Wisdom in South Sudan		
	SEMCAC Dodge County		

# SCOTT AND HALEY HAVE EACH OTHER. **AND A HOME.**



Scott Ellingson had a big year in 2017 - he turned 50, and he bought his first house for himself and his daughter, Haley, in Zumbrota.

"I've been renting all my life. I had been looking seriously for two or three years - but I'd pretty much given up on the market. Everything was being bought up by investors," Scott explained.

Scott had a friend that was looking for a house to flip. When he realized it was a home in the First Homes Community Land Trust that had to be owner-occupied, he called Scott and told him about it

"The day I looked at it, I put an offer on it quickly. I was so excited to tell Haley that I'd actually put an offer on a house!" said Scott. Haley was excited too, "I went



**I'm still trying to wrap my head around it - I own this house!**

and looked at it, and loved it right away!" she said.

Haley is currently taking classes at RCTC, and is planning on transferring into the Radiology program at University of Minnesota Rochester.

Scott said, "This place is perfect for us - she's got her space and I have mine, but we also can eat meals or watch TV together. I know at our other places she was sometimes embarrassed to have

friends over, now we're telling everybody to come on over!"

"There's so many things people with houses take for granted. I love having a garage! We're talking about getting a dog again because we actually have a yard. I'm saving money in the winter because I'm not having to run space heaters. I just wish I would have found this place 10 years ago."

"I'm still trying to wrap my around it - I own this house. Haley has always been my first priority, and now we're finally home."

First Homes, a wholly owned subsidiary of RAF, has providing 712 working families with homes since 1999. On behalf of First Homes, welcome home, Scott and Haley!

# COALITION FOR ROCHESTER AREA HOUSING



**COALITION**  
For Rochester Area Housing



**WWW.ROCHESTERAREA.ORG/COALITION**

**LEARN**  
ABOUT HOUSING CHALLENGES IN THE  
ROCHESTER AREA

**INVEST**  
IN ROCHESTER'S AREA WORKFORCE, FAMILIES,  
AND SENIORS

**COLLABORATE**  
WITH AREA COMMUNITY AND INDUSTRY  
LEADERS FOR ROBUST AND VIBRANT  
COMMUNITIES

**INNOVATE + CREATE**  
UNIQUE AND FORWARD LOOKING SOLUTIONS  
FOR HOMES AND NEIGHBORHOODS

In late December, Rochester Area Foundation announced the creation of the Coalition for Rochester Area Housing, a group of public and private sector organizations dedicated to affordable housing in the Rochester area.

The Coalition will lead a collaborative community program to acquire, invest, manage, and distribute funds and resources to create and preserve affordable and workforce-priced housing. The Coalition's founding partners are Rochester Area Foundation, the City of Rochester, Olmsted County, and Mayo Clinic.

"Together as a coalition, public and private sector leaders in the Rochester area have the capacity and resources to develop a broad and sustainable housing market that works for more people, today and into the future," says Jennifer Woodford, President of Rochester Area Foundation. "We are now seeking additional coalition partners to bolster our efforts and have greater impact on Rochester Area communities."

To learn more about the Coalition for Rochester Area Housing, visit [www.rochesterarea.org/coalition](http://www.rochesterarea.org/coalition).

# WHO WE ARE

Thanks to you, Rochester Area Foundation has become one of the largest sources of philanthropic support in the Rochester area. Since 1944, thousands of generous donors have entrusted us with nearly \$43 million in charitable assets to invest wisely.

**We help community members achieve maximum impact with their philanthropy.** Our donors rely on us for strategic advice and for administrative help with their grantmaking. We share in-depth knowledge of community needs to help donors make informed giving decisions.

**We are a convener and catalyst for change,** looking boldly into the future to help our donors and partners understand challenges, and bringing people together to create effective, collaborative solutions. In particular, we seek and support measurable impact with initiatives focused on affordable housing.

**We believe strong nonprofits build strong communities.** By making grants, growing agency endowment funds, and providing education and training, we work to increase the capacity of nonprofits so they can better serve those in need.

## WHAT WE DO

## HOW WE DO IT

Provide Donor Services  
& Steward Financial  
Investments

**Provide services** to amplify the impact of charitable giving through professionally managed donor-advised funds and philanthropic expertise.

**Create charitable legacies** that last beyond our donors' lifetimes through endowed funds and planned gifts.

Make Community Grants

**Maximize impact** by pooling financial and other support from many sources for the greatest benefit to Rochester area communities.

**Share data and knowledge** about pressing social needs and the programs that successfully address them.

Bring Leaders Together

**Convene leaders** with common interests to broker partnerships, alliances, and coalitions to address community challenges.

**Lead initiatives** to create measurable impact in the area of affordable housing.

Build Strong Nonprofits

**Increase the power** of the Rochester area nonprofit sector by strengthening the management, finances, and programs of organizations.

# CONSOLIDATED FINANCIAL REPORT FOR ROCHESTER AREA FOUNDATION & AFFILIATES

ASSETS	YE/2017	YE/2016
Cash and cash equivalents	\$1,094,886	\$1,356,026
Interest receivable	\$12,899	\$12,899
Pledges receivable, net	\$316,012	\$355,812
Investment in marketable securities	\$30,213,499	\$26,953,666
Beneficial interest in trust held by others	\$507,000	\$502,100
Loans receivable, net	\$2,240,037	\$2,133,346
Land and building, net	\$1,580,273	\$1,614,840
Leasehold improvements and equipment, net	\$810,919	\$831,350
Other assets	\$253,824	\$135,647
Land held in Community Land Trust	\$7,943,584	\$7,943,584

<b>TOTAL ASSETS</b>	<b>\$44,972,933</b>	<b>\$41,839,270</b>
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## LIABILITIES

Accounts payable and accrued expenses	\$69,321	\$16,369
Grants payable	\$57,000	\$67,700
Program assets held for others	\$766,049	\$579,891
Annuities payable and unitrust obligations	\$609,647	\$628,459
Notes payable	\$131,700	\$564,185
Mortgage payable	\$696,573	\$727,379
<b>TOTAL LIABILITIES</b>	<b>\$2,330,290</b>	<b>\$2,583,983</b>

## NET ASSETS

Unrestricted	\$30,695,073	\$24,286,427
Temporarily restricted	\$10,025,926	\$13,047,216
Permanently Restricted	\$1,921,644	\$1,921,644
<b>TOTAL NET ASSETS</b>	<b>\$42,642,643</b>	<b>\$39,255,287</b>

<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$44,972,933</b>	<b>\$41,839,270</b>
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# ROCHESTER AREA FOUNDATION

## 2017 ANNUAL REPORT

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Rochester Area  
Foundation