



Rochester  
Area Foundation

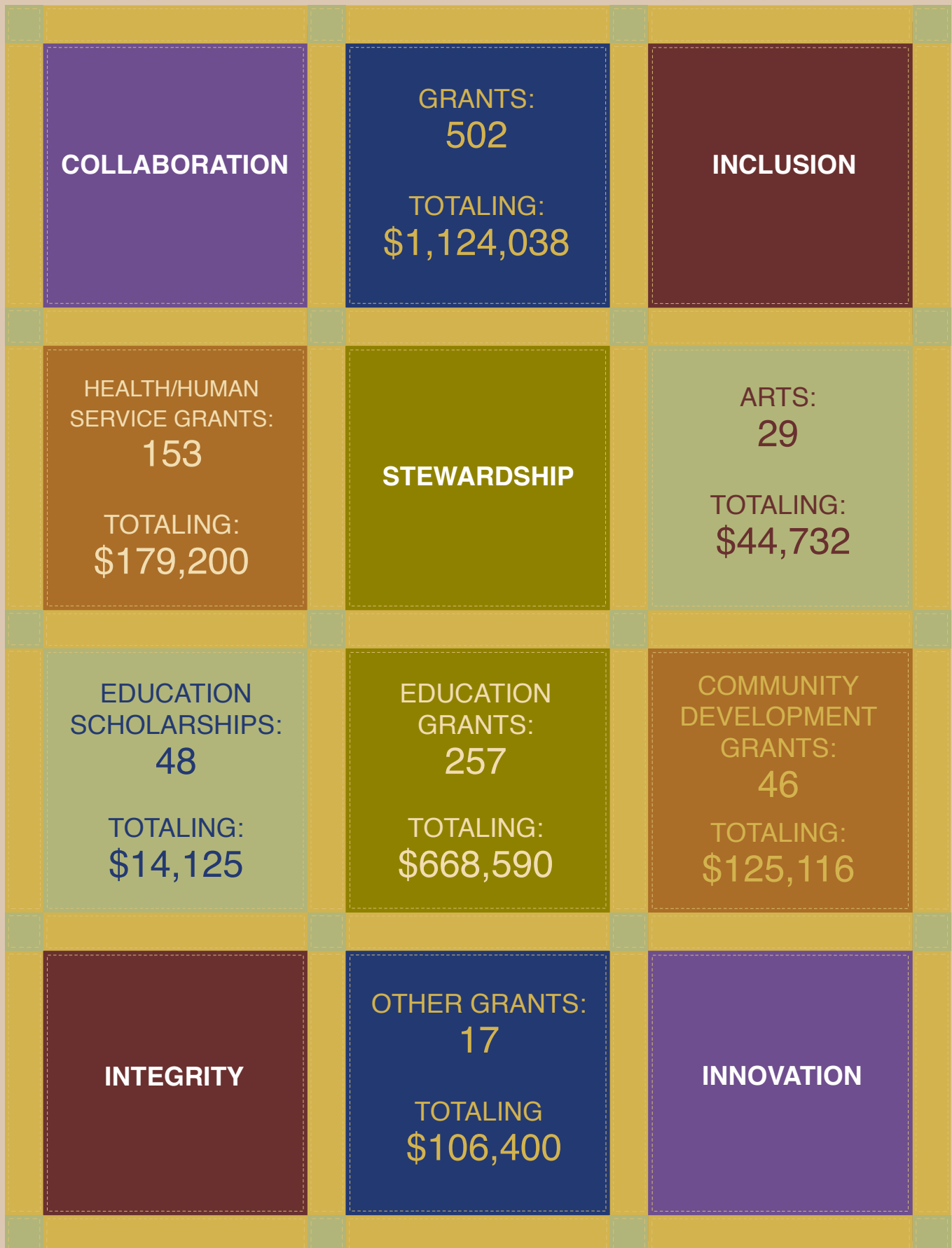
2013 REPORT TO  
THE COMMUNITY



**we 365  
Give**



# Patching together our community quilt one stitch at a time...



**Building better communities for all**

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Focusing on Service to Customer and Community



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Leaving Behind a Legacy



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Combining Sports, Study, and Service to Create Successful Futures



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Restoring Neighborhoods One Home at a Time

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# 2013 Rochester Area Foundation Board of Trustees



*Top: Mark Utz, Rochester Area Foundation President JoAnn Stormer, Jose Rivas, Greg Layton, Dr. Hugh Smith, Vivien Williams, John Benike*

*Bottom: Tom Wenthe, Denise Kelly, Karel Weigel, Wendy Shannon, Walt Ling*

*Not pictured: Paul Gorman, Leigh Johnson, Jean Locke, Barbara Porter*



## 2013 Rochester Community Finance Board

*Back row: Jose Rivas, Gary Smith*

*Middle row: First Homes Program Officer Cheryl Key, Chris Wendland, Joe Powers, Grants and Donor Services Manager Ann Fahy-Gust*

*Bottom row: Mary Jo Majerus, Greg Layton, Susan Strandberg  
Not pictured: Tom Wenthe, Ahmed Elkhalfataha*



## 2013 First Homes Board

*Back row: Jamie LeDent, Natalie Jones*

*Bottom row: Karel Weigel, Jose Rivas, Rachel Kessel, Umbelina Cremer*

*Not pictured: Don DeCramer, Paul Wilson, Loring Stead, M.D.*



## Rochester Area Foundation Staff

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Max Evans  
Paul Harkess  
Cheryl Key*

*Bottom row:  
Ann Fahy-Gust  
JoAnn Stormer  
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The Rochester Area Foundation Board and staff would like to thank Joe Powers on his years of continued service to this organization and our community.



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 Michon Rogers  
 David Stenhaus  
 Mark Utz



## From the Board Chair and President

We are proud of the depth of feelings people have for the greater Rochester area. Their willingness to create and support the building of better communities is truly inspirational and demonstrates a profound commitment to leave our communities better for the next generations.

The greater Rochester area is brimming with generous individuals, families, and businesses that freely give their time, talents, and treasure. Our work with generous philanthropists—including those who give a \$1 a day—shares a common quality: PASSION, whether for the community or for a particular cause or opportunity. This passion stitches together the greater Rochester area into a beautiful quilt that blankets the community, enfolding it in a rich history, vital present, and inspiring future. It is our honor to work with such kind and thoughtful philanthropists who give selflessly.

As stewards of the visions and legacies of generous donors, the Rochester Area Foundation (RAF) helps make progress toward addressing community needs. Our knowledge of the area enables us to be more than a grantmaker. We are also a bridge between private, public, and nonprofit organizations. As such, we are the neutral table at which all are welcome. This past year, our outstanding professional team supported, encouraged, and provided the tools and means necessary to help build better communities, which resulted in our growth and in a variety of accomplishments. These are just a few:

- Expanded professional staff to better serve our 250+ donor funds in their philanthropy.
- Worked with nonprofit organizations, through service and other grants, training, and more.
- Positioned our investments among the area foundation leaders in performance, which grew RAF assets to more than \$42 million.
- Developed new and more in-depth partnerships in the community.
- Launched a new program—weGive365—which makes it easier than ever for anyone to make a difference by giving a \$1 a day. Money is pooled and members vote on who receives the grants.

- Received a \$100,000 technical assistance grant from the U.S. Department of Treasury to develop our subsidiary, a Community Development Financial Institution (CDFI).
- Developed new website and expanded social media presence through Facebook and Twitter.
- Created the Nonprofit Academy—workshops for nonprofit employees and volunteers, organized in partnership with United Way of Olmsted County.
- Awarded 502 grants that made a positive impact in arts and culture, education, community development, health, animal-related services, human services, civic, environment, and scholarships.
- Articulated a new strategic plan, including an updated and renewed vision, mission, and values statement expressing our commitment to the long-range direction and priorities of the RAF.
- Served 12 new families' needs through First Homes via three home rehabilitations and 10 Community Land Trust home re-sales.
- Sponsored, along with First Homes, a housing study in partnership with Mayo Clinic and Olmsted County guiding future direction to affordable housing efforts.

But we did not do it all alone. We cannot forget our dedicated Board of Trustees and committee volunteers. They stand ready to help in any way they can to support and demonstrate their commitment.

Viewing our community quilt, created by the efforts of many, demonstrates that we are filled with tremendous energy, creativity, diversity, and opportunity. Yet, many remain in need. RAF helps by listening to donors and community partners to match resources with needs. Together, we believe the Foundation is helping build a brighter future for generations to come.

Thank you for giving us the opportunity to help you do more than you ever thought possible. Thank you for helping us make charitable giving a permanent part of the greater Rochester area. It's your story. It's your legacy that will last forever.

John Benike, Chair

JoAnn Stormer, President

# Rochester Area Foundation News

## SAVE THE DATE

**Wednesday, October 8 • 5:30-7:30 p.m. • Hilton Double Tree in Rochester**

- Investment summary with fund managers
- Discussion with nonprofits on investing through the Rochester Area Foundation
- Celebration of Philanthropy



## COMING SOON

The Rochester Area Foundation (RAF) is exploring the benefits of bringing a community finance entity to our area that would provide low-interest gap loans to nonprofits and families, along with the potential for other financial services in the future. Currently, RAF staff is engaging in a market study to determine the services most needed in a regional seven-county area. Stay informed about this coming opportunity through our website and social media. If you have any questions regarding this endeavor, please contact Ann Fahy-Gust at [ann@rochesterarea.org](mailto:ann@rochesterarea.org) or call (507) 424-2417.

## STRATEGIC PLANNING MAP





# Ryan Windows & Siding Donor Advised Fund

## Focusing on Service to Customer and Community



“I’d heard a lot of good things about the Rochester Area Foundation and what they have done for our community, I thought it would be a good vehicle to use in giving back.”

### **Bruce Ryan**

Owner and President of Ryan Windows & Siding, Inc.

Success begins with the right philosophy. For Bruce Ryan, owner and president of Ryan Windows & Siding, Inc., that philosophy includes serving the customer and the community. Ryan built his company by doing the best possible job for customers—offering excellent service and products—but the company is also committed to improving the quality of life in and around Rochester.

Ryan Windows & Siding, which began in 1991, supports, through grants, many local nonprofits, including Ronald McDonald House of Rochester, Gift of Life Transplant House, and Hiawatha Homes. Ryan and his staff also donate their time and talents to the community, including offering discounted construction service rates to area nonprofits. “We’ve always given back to the community. I encourage anyone and everyone that if you can’t donate your money, donate your time,” he says.

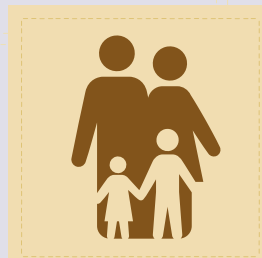
One of the most public ways Ryan Windows & Siding supports the community is through youth sports. For more than 20 years, it has sponsored about 30 teams annually—from soccer and baseball to softball, football, and others. “It’s really great to meet adults who say, ‘My baseball team was sponsored by you in middle school, and it was such a fun time. Thank you for helping make that experience possible,’” says Ryan. This type of support is made possible through the partnership Ryan has built with the Rochester Area Foundation. Ryan Windows & Siding has a Donor Advised Fund it uses to distribute impactful grants to

nonprofits of its choosing. “I’d heard a lot of good things about the Rochester Area Foundation and what they have done for our community,” says Ryan. “I thought it would be a good vehicle to use in giving back.”

Being aware of the needs of others is not only something Ryan has incorporated into his business philosophy, it is something he and his wife Katie have taught their children. As their son learns the family business, Ryan is assured his legacy of philanthropy will continue long after he is gone. “Katie and I feel very strongly about planned giving. We’ve named Ronald McDonald House of Rochester in our will. We’ve worked our whole lives to accumulate an estate, and when we are gone, we would like to give a gift back to those who can really benefit the most from it. The money we leave will continue helping families and kids who need it. It’s a great feeling to know that when we are gone, we will still be helping those in need,” says Ryan.

By being open and available to the needs of the community, Bruce and Katie Ryan and Ryan Windows & Siding are practicing true civic engagement. Not only are they invested financially in the Rochester area but, more importantly, they are invested socially. The Ryan philosophy of giving back to the community is a model that will continue to make this area a great place to live.





## Joe Powers Donor Advised Fund Leaving Behind a Legacy



It is a great vehicle for long-term philanthropic giving, and it allows my family to continue to make a difference after I am gone."

### Joe Powers

President, Powers Ventures

l to r: Joe Powers, Chris Powers, Nick Powers, Bunny Powers, Joe Powers Jr.

For decades, the Powers name has been synonymous with delicious food, great service, and generous philanthropy within the Rochester community. It's a reputation that began when Joe Powers opened his first business, Canadian Honker Restaurant, at age 21. And it's a reputation Powers wants to leave behind as a legacy.

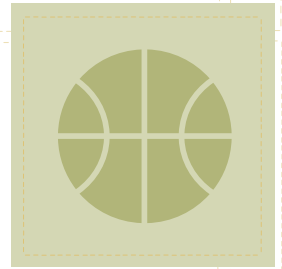
When the time came to make estate plans, Powers wanted to establish a connection between his children and the Rochester Area Foundation to benefit the non-profit causes the Powers family supports. That connection was created through a Donor Advised Fund financed through a life insurance policy owned by the Rochester Area Foundation. Traditionally, Donor Advised Funds are created through direct cash payment. Powers used a life insurance policy as the vehicle. This unique method allows the donor's family to engage in philanthropy after the donor's passing. The Rochester Area Foundation owns the policy, and the donor contributes the annual premium. That cost can be claimed as a charitable gift on annual income tax filings since the gift of the premium is made to the Foundation, which may use it to pay premiums on a policy that will one day benefit the Foundation.

In Powers' case, this approach made the most sense. "My kids are invested in my business, and that is my gift to them. It's not about giving a dollar amount to them once I'm gone. It's about giving them the responsibility to see that the community benefits from the success I have had and in a way that is tax-free," he says.

A Rochester Area Foundation board member who recently retired, Powers has always felt it is important to give back to the community. In his nine years at the Foundation, he has been involved in the success of the First Homes program and seen the Foundation's assets and influence grow. He continues to serve on the Rochester Community Finance Board and trusts that his Donor Advised Fund, upon his passing, will be in capable hands. His family knows that the money the fund receives after his death will be spent in a timely manner so as to make an impact on the community in a meaningful way. "It's important to strike a balance between maintaining a large endowment and making grants that are impactful," he says. "I've made it clear that I would like the funds to be distributed within five years."

The potential return on investment offered by a Donor Advised Fund via life insurance is one of many reasons Powers chose it. "I give credit to Alan Yanowitz [a Rochester attorney] who is incredibly knowledgeable in this area. He spoke very highly of the benefits to planning parts of my estate through the Rochester Area Foundation, and he helped facilitate the process. It is a great vehicle for long-term philanthropic giving, and it allows my family to continue to make a difference after I am gone," he says.

Whether it is through long-term estate planning, giving financially each year, or donating time and talent to an organization, Joe Powers is a wonderful example of the philanthropic spirit that constitutes the Rochester Area Foundation board and its donors.



# The Sports Mentorship Academy

## Combining Sports, Study, and Service to Create Successful Futures



“I wanted to give these kids an opportunity to succeed when they don’t feel like they have a chance.”

### Andre Crockett

Executive Director, Sports Mentorship Academy

l to r: Will Ruffin, James Robertson, Andre Crockett

Studies show that when young people participate in physical education and sports, they not only gain health benefits, they also learn about honesty, fairness, respect, teamwork, and following rules. Sports-based programs for youth even have educational benefits—increasing academic performance, attendance, and the desire to succeed ([sportanddev.org](http://sportanddev.org)).

While working for Olmsted County, Andre Crockett became aware of the pressing need for a local sports-based program for youth. He asked his supervisor what could be done and was told it would take time to develop a program through the normal channels—up to five years. “These kids just couldn’t wait five years,” he says. Sensing the urgency, Crockett started the program on his own. In 2009, the Sports Mentorship Academy was born—and Crockett became its executive director, while maintaining his regular job.

Basketball, football, and baseball are the three sports students from grades K-8 are exposed to during their time with the Sports Mentorship Academy. Twice a week, depending on the time of year, staff teaches one of the sports. Rules, fundamentals, strategy, and teamwork are discussed, and each sport has a competitive league and tournaments. The program’s high school students participate in a separate group called Next Level, which allows for athletes of certain ages or abilities to compete on a more competitive playing field. Some engage in athletics for Mayo,

Century, and John Marshall high schools. Many have older siblings who were once part of the Sports Mentorship Academy but now participate in college athletics.

Familiarization with college is an important part of the program. In partnership with St. Mary’s University, Winona State, the University of Minnesota–Twin Cities, and the Rochester Community and Technical College (RCTC), the Sports Mentorship Academy offers sports tours for students, allowing them to visit colleges and get used to the college environment. “We want them to envision going to college, and the best way to do that is to show them what it’s really like,” says Crockett. Students also tour local businesses. Exposing the youth to many avenues for success is critical in planting the seeds of success in their minds.

Success wasn’t built on athletics alone, however. The academy has a study-hall component staffed by area teachers and college students who volunteer their time after school throughout the year. Will Ruffin, a teacher in the Rochester Public Schools, for example, works with students during the study hall portion of their afternoon with the academy. Ruffin helps them develop study, time management, homework completion, and test preparation skills. He checks each student’s Skyward profile for attendance and to ensure his or her grades are on track for the established 2.5 GPA goal. The students also engage in small work-study groups and have the opportunity to read quietly.

To ensure youth success and connection within the community, the Sports Mentorship Academy goes a step beyond sports and academics. All academy youth participate in a service-learning project, an opportunity to give back to the community and learn leadership skills outside of a sports environment. Cleaning schools, picking up trash at parks, and working at food banks, like Channel One, are just a few examples of these projects. Integrating students into the community and instilling a sense of accomplishment helps strengthen the academy's goals and message by teaching them another path to character traits that can be gained through commitment and perseverance.

Crockett knows, firsthand, the impact sports have on youth. Originally from Baltimore, he was a successful athlete at Northwestern High School—scoring more than 2,000 points in his basketball career. As a result, he was heavily recruited by major Division I universities. Unfortunately, his SAT scores were not high enough to get into those schools. Instead, he attended Rochester Community College (now RCTC) where he played basketball. He later graduated from Winona State University and began training others who were interested in mentoring youth. "Basketball saved my life," says Crockett. Not being academically eligible to accept a college scholarship drove him to build an organization where athletics become the basis for teaching academic success. "I wanted to give these kids an opportunity to succeed when they don't feel like they have a chance," says Crockett.

Over the past five years, Crockett has worked hard to develop the Sports Mentorship Academy and build relationships that foster its growth. RCTC, Rochester Public Schools, the United Way, and

Mayo Clinic believe in the Sports Mentorship Academy's mission and have dedicated resources to aid Crockett in making his vision a reality. "We don't turn kids away if they are experiencing trouble in their lives," says James Robertson, program director and logistics coordinator. "We want these kids to not only stay active and occupied outside of school hours but to learn that all things are possible through dedication and hard work. The vast majority of these kids do not have a father at home; we try to give them the direction and guidance that kids need."

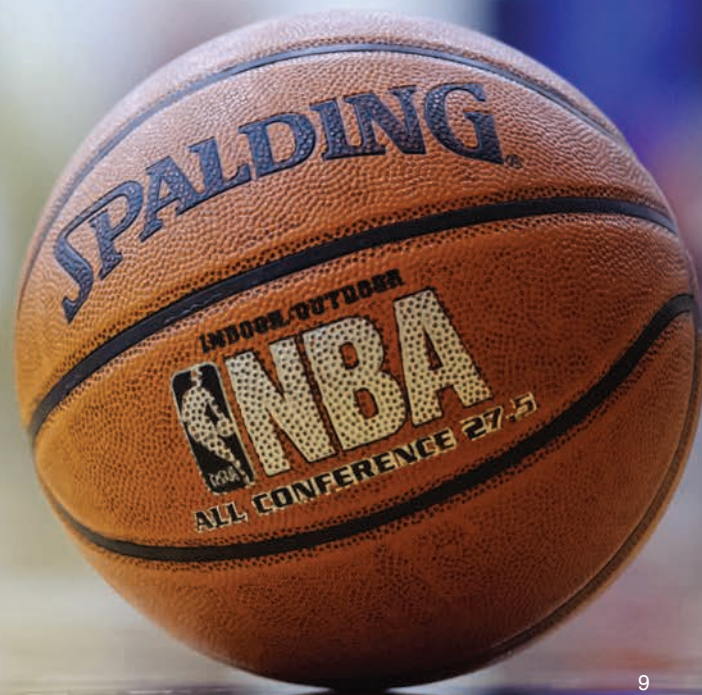
The Sports Mentorship Academy continues to grow and expand. With a small staff, it is difficult to meet the needs of all students. Currently, having enough transportation to and from the after school locations is an issue. In addition, because students spend multiple hours with the volunteers after school, there is a need to keep them nourished and energized to succeed. "Healthy snack foods are always a need for our kids," says Robertson. "Andre has been very generous when needed and dipped into his own finances to make sure the kids have something to eat after school. It would be great if we had the funding so he didn't need to do that."

The Sports Mentorship Academy recently expanded to Winona, and they have been asked to bring a chapter to St. Paul as well. Crockett and his staff are pleased with the response, and are excited to serve more youth. "We have a great melting pot of kids here—African-American, Latino, bi-racial," he says. "We have kids from different backgrounds, and it's great to get them all in the same environment, having fun together, and learning. That's what this is all about."

"We want these kids to not only stay active and occupied outside of school hours but to learn that all things are possible through dedication and hard work... We try to give them the direction and guidance that kids need."

**James Robertson**

Program Director and Logistics Coordinator





# Bear Creek Services

## Taking the First Step in the Journey to Independence



“Like any parent, they were cautious about their child moving out, which was only compounded by their child having special needs. This program has given them peace of mind and their children confidence.”

### Colleen Haffner

Bear Creek Program Supervisor

l to r: Colleen Haffner, Brian Hale, Linda Driessen, Melissa Kerlin

Independence. Responsibility. A sense of accomplishment. These are just a few of the gifts Bear Creek Services offers to those living with developmental disabilities in Rochester.

Residents in Bear Creek’s new, independent-living program learn how to live and grow in an environment that is free from 24-hour supervision. The program guides participants toward self-sufficiency, allowing Bear Creek staff and resources to focus increasingly on residents needing additional assistance.

The new program was created in response to recent state budget restrictions that placed a moratorium on the traditional four to five bedroom, community-based group homes. Bear Creek currently consists of 12 residential homes and three apartments but is unable to expand to new locations. Instead, staff focused on program innovation to open up space for new residents. Bear Creek staff saw a win-win scenario in a Minneapolis program that took residents with the potential to be more independent and taught them critical life skills in a two-person apartment setting. The program also saved taxpayer dollars. Bear Creek staff was determined to bring something like it to Rochester.

As a result, the Rochester Area Foundation issued a challenge grant to Bear Creek that matched donations given by others. This startup funding was the catalyst for the program’s

establishment. Olmsted County and its caseworkers determined which Bear Creek residents were candidates for the program. However, before Bear Creek could approach the county, it needed funding for the initial lease, staffing, and apartment furniture. Residents pay rent, food, and any other living expenses. They also must show a desire to learn, have a job, and have a history of holding a job to be considered. Based upon the timeline modeled by the Minneapolis program, Bear Creek Program Supervisor Colleen Haffner and her colleagues determined that it would take three to six months for participants to complete the program and graduate from a Bear Creek assisted apartment into an apartment of their own.

On August 1, 2013, the program began in earnest when Christina and Brianna, two 24-year-olds who had been living with their parents, moved into the apartment. Staff supervision was around the clock at first, with Program Coordinator Melissa Kerlin teaching the girls social skills, budget management, personal safety, cooking, and weather and other emergency strategies.

With only two people in the program, there is more time to teach life skills, since staff isn’t busy with other residents. “We wanted to give Christina, Brianna, and others in their situation a chance to be more self-reliant,” says Kerlin. The residents take a test to demonstrate that they can complete independent tasks,

while parents and case managers discuss resident goals. "At first, we went with [Christina and Brianna] to the grocery store and picked out everything, but as time progressed, they were able to be dropped off. They had their list and budget and were able to make decisions on what to purchase. The growth has been amazing," says Kerlin. Eventually, staff supervision dwindled to a few hours a week. "It's remarkable how much they accomplished," Kerlin says.

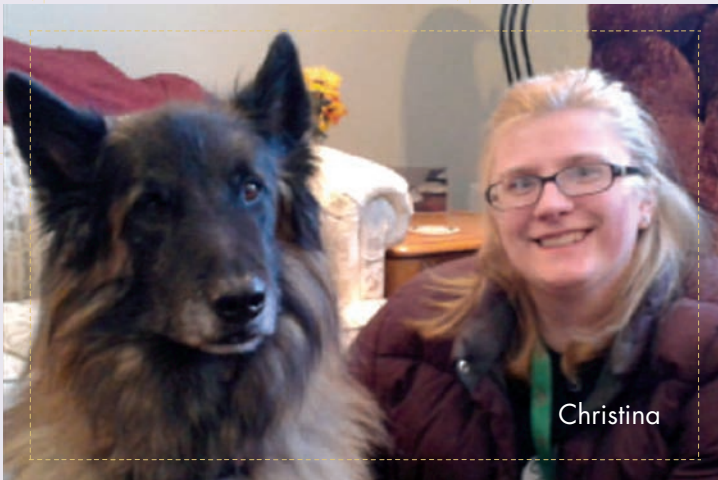
In early 2014, Christina and Brianna graduated from the program. Now, they live just down the hall in their own apartments. "Their parents are very happy to see how far they have come," says Haffner. "Like any parent, they were cautious about their child moving out, which was only compounded by their child having special needs. This program has given them peace of mind and their children confidence."

The Bear Creek Services independent-living program has been a viable one for Olmsted County. Not only does it use taxpayer money wisely, but it is a program that can be duplicated and is sustainable. "We wanted to create the correct model that others can emulate. We have been meeting with parents and county case workers continuously to record progress and address issues," says Haffner. "It's important to get this right and start slow, because we are the first program of this kind in the area."

Looking ahead, the future is bright for program graduates as they will have the knowledge and confidence to be contributing members of the community. This spring, two more residents will take Christina's and Brianna's places. With more than 20 people on the waiting list, there is always someone ready to start their own journey of independence.

## Bear Creek Services

Bear Creek Services was established in 1976 by concerned parents of children with developmental disabilities. "There were no other options for their care at that time. These children were being cared for at home," says Executive Director Linda Driessen. "They had no support system to help with job training, transportation, medical care, or recreational activities that were specific to each child's needs." Those parents helped found the first residential group home in our area. With the assistance of staff, young adults finally had an opportunity to grow and lead more independent lives.



Christina

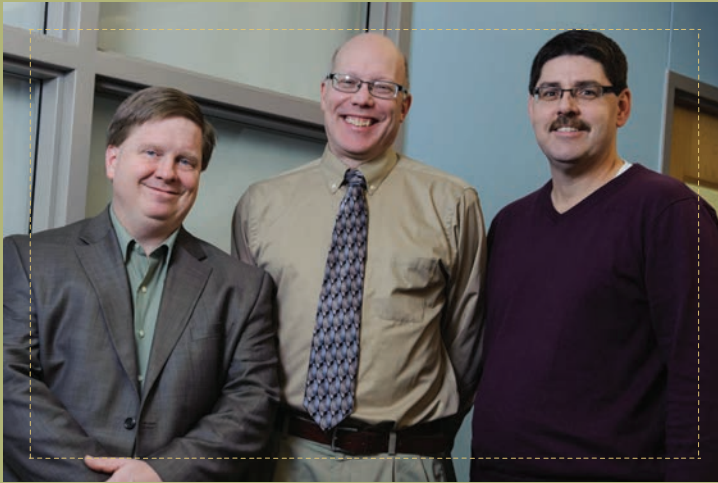


Breanna



# Rochester Public Schools Foundation

## Tapping Into the Community and Alumni to Preserve the Future



“Getting those people actively involved in our potential will allow us to do more grant making like many other public school foundations around our area.”

### Scott Mahle

RPSF Board Chair

l to r: Mark Schleusner, Scott Mahle, Mark Kuisle

Sometimes, it’s the little things that make a big difference in a child’s education. Perhaps it is the creative learning activities of a favorite teacher or practicing an instrument for middle school band. Maybe it’s acting in the school play or participating in after-school sports or clubs. Although each can be a pathway to the future for a young child, there is no guarantee that schools will have the budget for these inspiring ideas, programs, and activities. That’s why the Rochester Public Schools Foundation (RPSF) exists—to help fund activities for students and assist educators in carrying out innovative teaching methods.

But the road for the RPSF hasn’t always been smooth, and it recognizes the need to grow and promote its services to ensure they remain available to future generations. Founded in 1988, the RPSF had a paid executive director until 15 years ago. “The state of Minnesota used to provide funds to educational foundations for paid staff. When those state funds dried up, we were left with having to become an all-volunteer foundation,” says Mark Kuisle, a RPSF board member.

In 2006 the RPSF established their fund at the Rochester Area Foundation. Because it is all-volunteerr, RPSF does not have the time or expertise to manage its finances, which the RAF oversees. RPSF assets grow through the power of the RAF’s large portfolio, securing a stable, safe return on investments that is best for the long term.

RPSF uses monies received to supplement what has been cut from the budget district-wide and to innovate and enhance the learning environment. Teachers seeking creativity in their classroom can come to the RPSF for a grant to try new programs. A recent focus for grant distribution has been in the fields of study for science, technology, engineering, and mathematics, along with the Tix for Kids program, which allows children the opportunity to be exposed to theater, music, or sporting events that they otherwise would not have the opportunity to attend.

Yet, for continued growth, the RPSF recognizes the need for dedicated staff. “We will not get to where we need to until we have someone more full-time to accomplish what our strategic planning has determined we need to do,” says RPSF Board Chair Scott Mahle. Mahle started volunteering for the foundation when he came to Rochester. He used to write grants and get money from the RPSF. As a teacher, he was familiar with its mission and wanted to get involved as a way to pay the RPSF back for the grant money he received during his career in the district. Today, he looks forward to continued growth for the RPSF. “Over the years, the Rochester Public Schools Foundation has invested and distributed money as people have donated. We have not advertised the foundation and its mission throughout the district. That is something we anticipate doing with the help of the Rochester Area Foundation.”

In fact, marketing and advertising is a major focus. "Mayo High School has a video and advertisement board that is tasked with advertising to current students and parents in order to increase awareness of a project the school needs. We would like to have a similar capacity with the RPSF," says Mark Kuisle, a RPSF board member. Kuisle believes the foundation's future hinges on tapping into the network of current and retired teachers as well as current and past students. "Getting those people actively involved in our potential will allow us do more grant making like many other public school foundations around our area," he says.

Rochester Public Schools have thousands of graduates, and although they have graduated from different high schools, all share a common thread—Rochester. Mahle believes a paid staff person dedicated to development would be in a position to reach

out to graduates. "Reunions would be the obvious starting point; asking graduates who have the means to donate a tax deductible gift to the RPSF so other students can have the opportunities that they had." The RPSF plans to make these connections to ensure a well-rounded learning experience for future students and teachers.

The RPSF is also seeking assistance in developing a more complete fundraising strategy. "Everyone is in agreement on the plan; we just need to determine the timing," says Mahle. "We've received grants from Mayo Clinic targeting students of need with fine arts, music, and sports. Shoes, sports fees, and music equipment rentals are just some of the things we have assisted students with. As far as our granting needs, we need to fundraise to improve that. There are a lot of small districts around that have huge foundations. Rochester is one of the smallest in the state, but it doesn't have to be."



**Reece Trahan "RT" Autism Awareness Foundation (RTAAF)**

On Jan. 23, 2003, Brad and Joan Trahan's son, Reece, was diagnosed with severe autism. As they engaged this family challenge, in May 2003, they founded the Reece Trahan "RT" Autism Awareness Foundation (RTAAF) to support families and to build awareness about the rapidly growing incidences of autism.

Brad continues to be a statewide leader and vigorous advocate on autism-related public policy creation. From 2012 – 2013 he chaired the Minnesota Autism Task Force that created Minnesota's first Autism Strategic Plan.

RTAAF has raised over \$500,000 for autism-related initiatives. In 2006, the RTAAF partnered with the Olmsted County Sheriff's Office and the Rochester Police Department to fund Project Lifesaver, a program that provides equipment to rapidly track and locate autistic children who wander.

[rtautismawareness.org](http://rtautismawareness.org)



**Mindset Foundation**

The Mindset Foundation started in 2013 as a response to the feeling that if children could be taught leadership characters and values in middle school, there would be better outcomes on anti-bullying, reduction in drug use, and a positive influence on the schools and communities where we live and work.

Mindset Foundation created Mindset for Middle School and partnered with Kasson Mantorville Middle School for a trial. They engaged the entire staff and students in the training which commenced with a parachute drop onto the football field by Larry Yatch, former Navy SEAL. Students learn about courage, integrity, respect, and responsibility to name a few of the characters taught in the program. The focus is to see if there is a change in perception, which hopefully will drive changes in behavior. Research is ongoing, but the goal is to deliver a research-based, quality program that is affordable to all schools.

[mymindsetmatters.org](http://mymindsetmatters.org)



**Foundation**

In November 2011, the Dodge Center Foundation was formed as a mechanism for residents to give back to their community. Mayor Bill Ketchum announced the opening by saying, "If giving back to the community is important to you, establishing a fund through the Dodge Center Foundation may be a great philanthropic opportunity."

"By joining with the Rochester Area Foundation we are able to maximize earnings on our funds and retain the liquidity we need to serve our community," says Foundation Leader Brian Weber.

"We have many projects that have demonstrated that Dodge Center residents support local campaigns—the Dodge Center Golf Course expansion, the Natalie Webb Aquatic Center, and Cobra Country are just a few" says Weber. "The Foundation is a way to build on that success for our future."

**contact: [weberlaw@kmtel.com](mailto:weberlaw@kmtel.com)**



## Distant Relatives

### Rochester Program Strengthens Roots for Immigrant Youth



“The program is about building character. When they have that character built into them, they can be a help to their family, friends, and community

#### Said Mumin

Executive Director of Distant Relatives

Gardeners know that moving a plant from one area to another can cause something called “transplant shock,” stress or damage to the plant from the move. Plants moved from one spot to another often need a period of time to acclimate to their new environment. For the move to be a success, a variety of factors must be considered.

It’s not so different for those who uproot and move to a foreign country. Imagine the culture shock of having to get used to a completely new way of life, language, beliefs, and expectations in a place where almost everyone around you has been there from birth. Now imagine you are a young adult trying to assimilate yourself into the “wilds” of an American middle school. Your parents are relics from a completely different culture; their influence on you is strained by their own struggles toward understanding this foreign place. How can you participate in the community without proper guidance? How do you learn what success looks like when so many people around you don’t look or speak like you, and when you don’t understand this new way of life?

“Most of these kids are first-generation Americans, and they don’t know how to get involved in school. Their parents don’t speak the language, and the children have heavy accents. They get picked on in school and shy away from participating in normal school functions,” says Said Mumin, executive director of Distant Relatives, an after-school educational program.

Many families from foreign cultures are very structured and disciplined. Yet, often, these kids think they know more than their

parents and don’t relate when their parents try to tell them how things are done, because the parents aren’t as integrated into the new culture. When those children leave home each day, they become just like any other child their age. To succeed, they need to acclimate, says Mumin. They need guidance from someone they can relate to and trust until they feel comfortable in their new environment.

Through Distant Relatives, Mumin is encouraging success through athletics and mentorship. The program began in 2008 when a group of young Somali students approached Mumin to coach them in a basketball tournament called Hoops for Hope. Mumin helped fundraise for the team, joining with Rochester Somali businesses to provide jerseys for the kids and transportation to the tournament. It was a great success.

Passionate about being a mentor, Mumin saw the possibilities. He wanted to show these young people how to be successful in basketball, school, and life, so he researched the steps to establish a nonprofit organization with a mission of providing access to safe, educational after-school activities in a comfortable environment. Once he had the proper documentation and tax status, he approached more donors and expanded the program, which was originally named *Horseed* (pronounced “hor-said”), which means “to lead by example.” The Rochester Area Foundation gave Mumin an in-kind grant for office space and connections within the community that he uses to reach out to other organizations for expertise and fundraising. In 2014, the foundation also provided Distant Relatives with a cash grant.



The program is designed to “reach these kids through something they seem to enjoy, which is competition,” says Mumin. For boys, the program offers basketball and soccer, for girls, swimming. Mumin and his volunteers coach the teams, building trust and bonding with the kids. “By coaching and tutoring, we become role models and show them how to join the larger community,” he says.

Tutoring is also part of the program, although the current tutoring center only has capacity for 15 kids at a time. The center has a phone, Internet, and five computers students can use for homework. In the program, college students mentor high school students, while high school students mentor middle school students. A hierarchy of leadership is established that creates a path to successful integration for everyone. “The program is about building character. When they have that character built into them, they can be a help to their family, friends, and community,” says Mumin.

In the future, Mumin wants to expand the tutoring program, but, to

do so, he will need a licensed teacher willing to volunteer his or her time. Transportation is the biggest obstacle, though, since the tutoring center is not located in school district buildings. The program needs a larger van, so more kids can get rides home after tutoring sessions or athletic events.

Today, Distant Relatives serves 120 children and partners with 15 volunteers. Daily, Mumin sees the difference it is making in the lives of the kids and their families as well as the community. “I want to connect people in my cultural community to the Rochester community. I want to be a bridge between the two. We all are distant relatives,” says Mumin. “Every human is capable of exceeding any limitation that is perceived. It doesn’t have anything to do with your race, your background, your culture, your religion. What we do is provide a blueprint to these kids and say these are people who look, talk, walk, act like you and who have succeeded in this country—and you can do it, too.”

## Nonprofit Seminar Academy

### Bringing Together Area Organizations to Benefit the Community

The Rochester area is home to a large constituency of nonprofit organizations, like the United Way of Olmsted County, the Boys & Girls Club, Salvation Army, Red Cross, and others. These large organizations have a national presence and instant name recognition due to decades of good work on behalf of those in need. The Rochester community is fortunate to have many other nonprofits tackling issues—from mental health and youth development to domestic abuse and feeding the needy. Yet many of these smaller nonprofits do not have the budgetary or personnel resources necessary to grow as the community grows. That’s why the Rochester Area Foundation and the United Way partnered on a monthly Nonprofit Seminar Academy, offering educational topics to assist nonprofit staff and volunteers in understanding and doing their work.

The Nonprofit Seminar Academy began in 2013 with a series of topic-based, half-day seminars designed to strengthen nonprofit personnel in fields such as finance, human resources, board functioning, fund development, and results measurement. Rochester Area Foundation Grants and Donor Services Manager Ann Fahy-Gust and the United Way’s Senior Vice President April Sutor have been instrumental in coordinating the seminars, each of which features a presenter who is an expert in the given topic.

“One result of the recession and government cutbacks was reduction and elimination of professional/organizational development funds” explains Sutor. “Nonprofits unselfishly focus on service so they cut their own budgets first before eliminating direct services. A strong nonprofit sector benefits business, government, and the people.” The Nonprofit Seminar Academy fulfills this need, she adds.

Not only does the academy provide an excellent opportunity for nonprofit employees to learn critical best practices, it also offers networking so they can learn what is going on in the nonprofit sector. This brings together organizations working toward the same goal, which helps increase Rochester’s quality of life.

The academy also provides a great way for the area’s largest grantmakers, like the United Way, Think Bank, Mayo Clinic, and the Rochester Area Foundation, to build relationships with area nonprofits and work together to identify and address community needs.

In its first year, the academy connected hundreds of nonprofit professionals and volunteers for skill building, networking, and idea exchanging. “We’re thrilled to bring this level of expertise and learning to our many community partners,” says Sutor. Fahy-Gust agrees.

“It has really been a successful partnership between our organizations and a great resource for smaller nonprofits that are always looking for ways to improve their operations,” she says. “We have great attendance, and you can really tell it is making an impact.”

The 2014 Nonprofit Seminar Academy is underway. Nonprofit employees and volunteers can register on a monthly basis, determined by the topic they feel will most benefit their organization. The cost of \$10 covers food and some presenter costs. To register, visit the Rochester Area Foundation’s website at [www.RochesterArea.org](http://www.RochesterArea.org) or call Ann Fahy-Gust at (507) 424-2417.



## The Arc Southeastern Minnesota Partnership Helps the Mission Continue



“When our citizens with disabilities are properly cared for, it not only enhances their lives, but it enhances everyone that comes into contact with them.”

### Arne Fockler

Former President of The Arc SE MN

Pictured: Tena Green and her son Brady

Nonprofit work can be daunting. There is always a mission statement focusing on a community need, but the money and resources to meet that need are not always available. Budgets get tight. Services get cut. Unfortunately, the people affected are the ones who need help the most. Through a partnership with the Rochester Area Foundation, The Arc Southeastern Minnesota (The Arc SE MN) is helping those in need and planning for the future by investing donations to aid in yearly programming and carrying out its mission and vision.

A non-profit, volunteer-based membership organization, The Arc SE MN began informally in the late 1940s, incorporating in 1955. “Our mission is to build inclusive communities by protecting human rights through advocacy, support, and education for persons with intellectual and developmental disabilities and their families,” says Tena Green, development coordinator for The Arc SE MN. “The Arc is the gateway through which persons with intellectual and developmental disabilities and their families pass as they search for support from others who have shared their same experience.”

Today, The Arc SE MN helps people in eight counties of southeastern Minnesota—Olmsted, Dodge, Fillmore, Goodhue, Rice, Houston, Wabasha, and Winona. Membership is made up of persons with intellectual and developmental disabilities, family members, and legal representatives, service providers,

and other interested community members. With a staff of 10, consisting of one full-time and nine part-time employees, its capacity as an organization has been a balancing act since the beginning. The organization works to identify gaps in the service system and lead collaborative efforts with other agencies to close them. Primary services include individual and family advocacy, public policy advocacy, self-advocacy, housing access services, education, and outreach to persons with disabilities, family members, providers, and the community.

As a voice for members of the community with disabilities, The Arc SE MN aids them in leading normal, everyday lives. Recognizing continued demand but realizing limited staff resources for the organization’s wide-range of services, The Arc SE MN’s board of directors sought a partnership with the Rochester Area Foundation in 1993, establishing a fund with the Foundation thanks to a donor’s small bequest.

“At the time we started the fund, we were only serving Olmsted County. Other independent chapters were serving the other seven counties,” says Green. “Because we were quite a small non-profit without a traditional funding stream, our board was looking at ways to ensure our longevity as an organization, with the knowledge that we didn’t necessarily have all the needed expertise or resources to start or maintain our own investment program. We also felt a relationship with

the Rochester Area Foundation would benefit The Arc SE MN through public relations in the community."

During the past 20 years, The Arc SE MN has maintained the fund with the idea of growing it so it might one day become a significant financial support to the organization. In 2010 and 2011, difficult financial years, The Arc SE MN tapped into the fund earnings. "This allowed us not to make deeper program or staff cuts and to continue to provide mission-specific services," Green says. "Many organizations that serve persons with disabilities have Medical Assistance as a primary funding source. Because of the types of services we provide (advocacy and support), that is not true for The Arc. We need to raise funds for the vast majority of our budget. We saw the Foundation fund as a potential tool to offer financial stability in future years."

Growing the fund significantly is still the goal. Doing so could lead to new and expanded services. Arne Fockler, former president of The Arc SE MN, says state funding has been

frozen, and organizations such as The Arc SE MN have continued to innovate their business model. "The words everyone wants to hear are efficient and effective, and The Arc and other organizations are striving to show they are good stewards of taxpayer money," says Fockler. "When our citizens with disabilities are properly cared for, it not only enhances their lives, but it enhances everyone that comes into contact with them. With funding frozen, it is more critical than ever to explore new ways to secure the resources necessary for the care of our family members, friends, and neighbors. The partnership with the Rochester Area Foundation is one of those ways, and it is a safe and stable option."

Thanks to this collaboration, The Arc SE MN's mission continues. The good work they do is critical to an inclusive community and the Rochester Area Foundation is honored by the trust The Arc SE MN has placed in it. Nonprofits in the greater Rochester area that do not have the capacity to oversee their investments stand to benefit greatly from a relationship with the Foundation and its nonprofit expertise.



"We saw the Foundation fund as a potential tool to offer financial stability in future years."

**Tena Green**

Development Coordinator, The Arc SE MN



## weGive365

Uniting to Make a Difference for \$1 a Day



*“My wife and I joined weGive365 because it offers an easy way to be involved and give back to our community.”*

**Carl Jepsen**

What is philanthropy? Many believe it involves giving large sums of money to charity—amounts only the wealthy have the luxury of affording. But philanthropy can take many forms, one of which is the Rochester Area Foundation’s new charitable fund, weGive365. It all starts with \$1 a day.

While it may not seem like \$1 a day would amount to anything substantive, combining it with the \$1 that others give creates many possibilities. Those who donate \$365 per year through weGive365, join a large pool of like-minded individuals, families, and businesses doing the same. Then, through the power of the Rochester Area Foundation’s endowment, the funds grow. The Rochester Area Foundation’s investment portfolio has averaged a 9.5 percent return over its 70-year history, which means the weGive365 fund transforms \$1 gifts into much larger gifts over time.

How does it work? All donated money is split into two groups each year. The first portion remains in the fund to grow based on the performance of the Foundation’s endowment. The second is distributed as grants to local nonprofits. These grants, which are critical to smaller nonprofits and their missions, are capped at \$1,000 per request.

Grant requests submitted to weGive365 are made available to members for review. They can then vote online for their favorite proposal. Votes are tallied and the grants distributed to the winning

nonprofits. This process makes philanthropy accessible to everyone and helps nonprofits reach a larger audience of potential donors. “Nonprofits are able to get their mission out to more people; and donors who are already interested in donating are given the opportunity to donate beyond their \$1 a day to a nonprofit they truly believe. Sometimes, it is an organization they didn’t know existed, so it is a great opportunity for both parties,” says Grants and Donor Services Manager Ann Fahy-Gust of the Rochester Area Foundation.

The program offers a collaborative way to give that links likeminded, generous people together to make a big impact in the community. Comprised of friends, neighbors, co-workers, and others in the community, weGive365 is an innovative way to think about philanthropy and how little it takes to make a difference in the lives of others—at just \$1 a day. Carl Jepsen, was one of the first to join. “My wife and I joined weGive365 because it offers an easy way to be involved and give back to our community,” he says.

For more information on becoming part of the weGive365 group, contact the Rochester Area Foundation at (507) 282-0203 or go online under “Community Initiatives” at [www.RochesterArea.org/Learn](http://www.RochesterArea.org/Learn).



# First Homes Community Land Trust

## Home Ownership is Key to Community Success



“Many people don’t understand that First Homes properties actually serve multiple families rather than just one. They are part of a program designed to last long after we are gone.”

**Don DeCramer**

– Former Board Chair, First Homes Board of Trustees

Don DeCramer is invested in the success of the First Homes program. During First Homes’ 15-year history, DeCramer has spent nine on the Board of Trustees—attending board meetings, meeting with community partners, and serving as a prominent voice for the availability of affordable housing in the Rochester area. In fact, affordable homeownership is a cause close to DeCramer’s heart and has been since he and his wife first moved to Rochester in the 1970s when he began working as an engineer at TSP in Rochester, and later as a Facilities project Manager at Mayo Clinic.

“I remember the night after my wife and I bought our first home. We signed the purchase agreement and lay awake most of the night thinking, ‘How are we going to pay for this now?’” he says. “I personally know what is it like to go through that process. I also have daughters that I have helped guide through it. Not everyone has the resources that were available to us. There are so many people in the community who could benefit from having a home they can afford.”

Ownership, stability, and a sense of pride are core values that are critical to a successful community. These, along with financial means, are also qualities necessary for homeowners. Throughout the 1990’s, however, there was a shortage of affordable homes in the Rochester area. DeCramer was involved in addressing this problem. That’s when First Homes

was conceived and its mission of affordable home ownership for those in need was born.

“I had a conversation many years ago with someone in the Mayo Clinic Human Resources Department, who said their number one problem was finding houses that newly hired employees could afford,” says DeCramer. The housing shortage “hit home,” affecting the hiring process in his department.

“It was a big problem,” he adds. That’s why he accepted a role with the Community Housing Partnership (CHP) in the late 1990s. With Mayo Clinic financial support, CHP started restoring four blighted homes in the Kutzky neighborhood. CHP did not have the staffing capacity for the renovation of blighted homes, so many of its responsibilities were transferred to the newly created First Homes program. First Homes, together with the Rochester Area Foundation, gathered builders and community partners to raise \$14 million to continue addressing Rochester’s lack of affordable housing.

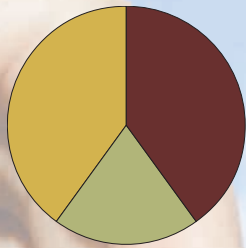
Through the Heritage Homes initiative, First Homes purchased and renovated foreclosed and blighted properties in the downtown core neighborhoods of Kutzky, Slatterly, and Eastside. It also began new housing construction on the edge of Rochester and in surrounding communities. These homes

were then placed in a Community Land Trust, allowing them to be sold at an affordable and restricted purchase price buyers with moderate incomes. "It is important to build equity and have an asset you can claim, as opposed to renting for long periods of time," DeCramer says.

The Community Land Trust makes it possible for people to make payments for their home that are less expensive than the market value. This is much different than Section 8 housing, in that those in the program are not receiving public subsidy. First Homes residents own their home, pay property taxes, and make payments to their bank just as any other homeowner. "The transformation that the Heritage Homes initiative has had on the core neighborhoods has been incredible," says DeCramer. "It's important to work toward the 'tipping point' in each neighborhood, where renovation and upkeep will carry over to homeowners not involved in the First Homes program. First Homes was the catalyst for neighborhood change and people have a better feeling about their neighborhood than they did 10 years ago."

Looking forward, DeCramer is confident about the program's future. First Homes has wonderful community support and continues to have discussions with Olmsted County about the future housing needs of the area. Olmsted County, First Homes and the Rochester Area Foundation held a 2013 Housing Summit that was a great venue for all parties involved. DeCramer knows First Homes still needs to raise funds to expand the number of available homes but says it is a proven model that has been successful.

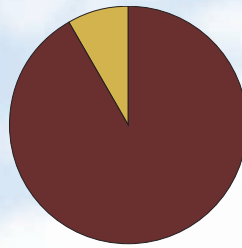
"Many people don't understand that First Homes properties actually serve multiple families rather than just one. They are part of a program designed to last long after we are gone," he says. As for the future, DeCramer believes the key to success downtown is mixed rate rentals. A mix is the key. "Projects can be integrated to suit market and affordable rates," he says. "Along with business and entrepreneurial startups in our downtown area, if you can build some of that and place housing up above it, while renovating the historic core areas, that is win-win for the community."



**Homeownership:**

- Downpayment Assistance 426
- Community Land Trust 210
- Rental 423

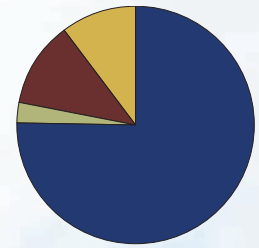
**Total 1059 Units**



**Homeownership:**

- New Construction 583
- Acquisition/Rehab 53

**Total 636 Units**



**Total Funding Sources:**

- State \$68,275,218
- Federal \$2,499,879
- Local \$10,791,400
- Private \$9,122,141

*funding includes 1st Mortgage Financing*

"The transformation that the Heritage Homes initiative has had on the core neighborhoods as been incredible."

**Don DeCramer**

- Former Board Chair, First Homes Board of Trustees

# Heritage Homes – Restoring Neighborhoods One Home at a Time



“This housing program transformed our neighborhood into a peaceful, abundantly livable, and lively place.”

**Stephanie Podulke**  
Olmsted County Commissioner

Throughout downtown Rochester’s core neighborhoods, which date back to the turn of the 20th century, some of its most valued treasures lie. These are the homes built when the city boundaries first expanded beyond St. Mary’s Hospital and the Zumbro River. With unique interior wood craftsmanship, elegant windows, and hardwood floors, these homes, if preserved and maintained, are a living, breathing time machine into the past.

Sadly, over the course of decades, many of these historic buildings fell into disrepair, were foreclosed, abandoned or converted to multiple level apartment complexes. Others required renovations their owners could not afford. As these houses deteriorated, so did the look and feel of the neighborhoods throughout the 1980s and 1990s. The Kutzky, Slatterly, and Eastside neighborhoods had lost their grandeur and needed serious attention from the community to return to their former glory.

Buying a house in the Kutzky Park neighborhood in 1976 was risky says Olmsted County Commissioner Stephanie Podulke, who did just that. She recalls:

*“The neighborhood was populated by transient students and a few drug pushers; most of the larger houses had been converted into multi-unit buildings by indifferent, absentee landlords. There were very few families with young children.*

*We found that we could afford our house, but it had been neglected for years—storm windows and screens were missing. It had a leaky roof, substandard plumbing, inadequate electricity, peeling exterior paint, and grass overrun with weeds. That would have described a majority of houses in our block. As we started fixing up our house, a few others were getting repaired as well. We were still overrun with drug pushers, loud cars and parties, trash strewn about buildings, car thefts, and a raft of absentee landlords who exploited the peace of the neighborhood for as much rent as they could get without restoring or taking care of their properties.*

*Then, the Heritage Homes program came to our block! They purchased abandoned or decrepit homes and restored them to their original charm and dignity. Families moved in, young couples, professional people. Our little block on West Center street was full of wholesome life, children playing, people riding bikes, people walking their dogs, people taking ownership of their yards and gardens, neighbors talking to one another. This housing program transformed our neighborhood into a peaceful, abundantly livable, and lively place.”*

The transformation began in 2004 when First Homes and its Heritage Homes initiative started purchasing foreclosed and blighted homes in these neighborhoods. With funding from dozens of community partners including local banks, businesses,

and Mayo Clinic, First Homes purchased 53 houses over the course of 10 years and began restoring the homes with new electrical, plumbing, mechanicals and exterior upgrades. Once renovations were completed, the homes were placed in First Homes' Community Land Trust program (CLT) to make them affordable for families. The trust allows the buyer to purchase the house while leasing the land from First Homes. It creates a smaller monthly mortgage payment that appeals to buyers who, many times, are buying their first home.

Along with offering more affordable housing options in Rochester, First Homes' Heritage Homes initiative has helped these neighborhoods come alive. "The Heritage Homes program has made the same difference in all of the neighborhoods where they wisely invested community funds,

leveraging them into desirable homes with increased property values and quality of life for all neighbors," says Podulke.

Neighbors living near these homes have witnessed the changes and been increasingly motivated to repair and maintain their own homes. Neighborhood awareness about crime and safety has increased, which has brought additional interest from potential homebuyers. "The city has definitely seen a change in the perception of those core neighborhoods," says Terry Spaeth, a senior administrative analyst for the city of Rochester. "There were blighted properties throughout those neighborhoods. Not only were they eyesores, but they created a negative stigma throughout the community. The Heritage Homes program has been a boost to those areas and Rochester as a whole."

## Before



## After





# 2013 Donors

Thank you to the following 2013 donors. Some contributions established new charitable funds while others were added to existing funds or were made in memory or honor of a loved one. We gratefully acknowledge and thank the following donors for their generous gifts during the year. 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.

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Canadian Honker Restaurant and Catering	Marjorie Ginn	Alan & Margaret Lichty
Elaine Case & Bill Wiktor	Steve & Tena Green	Life Program
Partick & Shirley Caskey	James & Suzanne Greenleaf	Beverly Livesay
Sheryl & Randy Chapman	Mr. & Mrs Robert Gregerson	Stephen & Ada Longnecker
Chatfield Brass Band Inc.	Mr. & Mrs. Leon Gregg	Gail Loucks
Chosen Valley Community Foundation	Paul H Grinde & Debra A Jacobson	Mary Luhman-Johnson
Steven & Marolee Christopherson	Bob & Cindy Groettum	Bob & Mary Lynch
Jim & Sue Claussen	Merl & Marilyn Groteboer	Amanda Mallinger Reinartz
Ellen Connolly-Eckhoff	Barbara & David Hanlon	Ed & Marge Manahan
Brian, Kathy, Olivia & Anna Cook	Mr. & Mrs. Donald E Hanson	Lillian Masson
Elizabeth L Cronin	Misha Hanson	Mayo Clinic

Cindy McGrath  
 James & Esther McNeil  
 Drew Miller  
 Joan & Ron Miller Elaine Most  
 Dr. Evan L & Bonnie Nelson  
 Bernard & Julie Nigon  
 Robert & Sharon Nuss  
 Nuss Truck Group Inc.  
 David & Gwen Oeth  
 Dr. & Mrs. PJ Osmundson  
 William & Sharon Padgett  
 Cynthia Parker-Nies  
 Jay H Ryu &  
 Particia A Pellikka  
 Rich & Shirley Peter  
 Irv & Maureen Plitzuweit  
 Stephanie Podulke  
 Joey Powers  
 Nick Powers  
 Tamara Pozos  
 Premier Bank Rochester  
 Betty Qualey  
 Sean Rice  
 Janet Rich  
 Mr & Mrs Thomas Richards  
 Dale & Barb Richter  
 Merlin & Karne Ricklefs  
 Rochester Area Kappa  
 Delta Alumnae  
 Rochester Music Guild  
 Rochester Public School  
 Foundation  
 Michon Rogers  
 Edward & Janice Rowley  
 RSM McGladrey  
 David Rue  
 Mr & Mrs Bruce E Ryan  
 Ronald Salzar & Juline  
 Thomley  
 Paula Santrach  
 Paul & Maggie Scanlon  
 Al & Julie Schafer  
 Taran Schneider  
 Kyle Schoh  
 Dr. & Mrs DA Scholz  
 Joyce Sharp  
 Dr Patrick & Karen Sheedy  
 Dr. Richard & JoAnn Sheldon  
 Jim & Judy Sloan  
 Hugh Smith  
 Mrs. Ralph Smith  
 Jeanne & Tom Smith  
 Eric & Meghan Snyder  
 Kim Snyder  
 Charles Sorenson

David & Sara Stenhaus  
 Patrick Steward &  
 Patricia Greipp  
 Randy & Patricia Stinchfield  
 Stephen & JoAnn Stormer  
 Donald & Colleen Sudor  
 Jim & Jill Suk  
 Don Supalla  
 April Sutor  
 Dr Harry & Delores Swendlund  
 Selmer & Alice Syverson  
 Mark & Sheryl Tasler  
 Judith Taylor  
 Brandi Thompson  
 Brad Thornton  
 Grace Thornton  
 Del & Edie Thurber  
 Paul & Barb Tieskoetter  
 Jodi Tomlonovic  
 Kathleen Tomlonovic  
 Alan & Sharon Tuntland  
 US Bancorp Foundation  
 Rich & Marian Van Dellen  
 Van de North - Knight Family  
 Peter & Sheryl Vickers  
 Margaret & Phillip Vickers  
 Karel M Weigel  
 Chuck & Myrlee Weisbrod  
 Wendland Utz  
 Tom & Ellen Wentz  
 Adam & Heather Wilford  
 Tome Williams  
 Jodi L Williamson  
 Kaye Willis  
 Sally L Wilson  
 Charles & Barbara Withers  
 Howard Wood  
 Doug & Lori Wright  
 Ron & Judy Yaggy  
 Ron & Diane Yanish  
 Karen & Steve Ytterberg  
 Jeri Zimmerman  
 Warren & Helen Zimmerman

## 2013 Honor and Memory Gifts

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

Ted Deaner  
 Marion Stenhaus  
 LaVonne Bowman  
 Chester Bahr  
 Eileen Jones  
 Deane Huber  
 Rock Gorowsky  
 Patricia Ann Daft  
 Lucas Roussel  
 Manya Twite  
 Vince Herring  
 Eunice Stormer  
 Helen Irving  
 Mary Hyde  
 Dick Thornton  
 Leon Blenkush Jr  
 Patricia Judd  
 William F Taylor  
 Anne Manahan  
 Helmer M Jorgensen  
 Paul Barton  
 Peggy Anderson  
 Elizabeth Laroque  
 Michael Klampe  
 Sheila Howe

## 2013 New Funds

Donor Advised Funds  
 Dr. Peter and Bari Amadio  
 Reece Trahan Autism  
 Awareness Foundation  
 Lynn Behnke  
 Mindset Foundation  
 Stewartville Community  
 Foundation  
 Dodge Center Foundation  
 Dr. Judith and Judge  
 Lawrence Collins

Donor Designated  
 Helen Drewes  
 Christ Methodist Church

## Heritage Society Members

Jeffrey G. Allman  
 Neil P. Anderson  
 John Bakke  
 Dr. Peter & Carol C. Carryer  
 Jim & Sue Clausen  
 Al & Ann DeBoer  
 Dr. Joseph & Lois Duffy  
 Michael J. & Joy Fogarty  
 Paul & Rebeca Harkess  
 Roy L. Hoffman  
 Lois A. Jorstad  
 Dan & Mary Jo Kelly  
 Wallace Merritt  
 David & Gwen Oeth  
 Joe Powers  
 Jim & Joyce Talen  
 Al & Sharon Tuntland  
 Joyce M. Wenz  
 Ron & Diane Yanish  
 Dick & Judy Argue  
 Barbara L. Brown  
 Jane K. Champion  
 Barbara Flasch  
 Dorothy Gauthier  
 Toni A. Hanson  
 Marianne Hockema  
 John & Rita Hunt  
 Lyle & Nancy Kuhlmann  
 Jon & Sue Losness  
 James W. & Jean A.  
 Newcomer  
 Richard Orvold &  
 Marita Heller  
 Bruce & Sara Qualey  
 Al & Julie Schafer  
 Larry & Wendy Shannon  
 Jim & Judy Sloan  
 Steve & Nancy Thornton  
 Glenn & Ella Van Laningham  
 Karel Weigel  
 Nedra Morgan Wicks  
 Hugh & Aynsley Smith

# Rochester Area Foundation & Affiliates

Consolidated Statement of Financial Position

December 31, 2013 and 2012

<b>Assets</b>	<b>2013</b>	<b>2012</b>
Cash and cash equivalents	196,153	406,945
Interest and dividends receivable	23,469	25,242
Pledges receivable	15,000	41,150
Notes receivable	12,150	201,057
Investment in marketable securities	27,624,664	24,901,322
Beneficial interest in trust held by others	667,751	661,205
Loans receivable, net	2,201,471	2,169,723
Equipment, net	10,411	19,119
Other assests	969,817	1,462,869
Land held in Community Land Trust	8,013,584	8,060,398
Intercompany receivable net	2,463,740	851,299
<b>Total Assets</b>	<b>42,198,211</b>	<b>38,800,354</b>

## Liabilities and Net Assets

### Liabilities

Accounts payable and accrued expenses	19,023	45,306
Grants payable	44,200	51,350
Program assests held for others	537,656	486,764
Annuities payable and unitrust obligations	703,724	714,449
Refundable advances		156,667
Notes payable	1,588,965	2,482,904
Intercompany payable, net	2,463,740	851,299
<b>Total Liabilities</b>	<b>5,357,308</b>	<b>4,788,738</b>

## Commitments

### Net Assests

Unrestricted	32,453,149	29,875,343
Temporarily restricted	2,466,110	2,214,629
Permanently restricted	1,921,644	1,921,644
<b>Total Net Assets</b>	<b>36,840,903</b>	<b>34,011,616</b>
<b>Total Liabilities and Net Assets</b>	<b>42,198,211</b>	<b>38,800,354</b>

Audit status – financial results for the year ended December 31, 2013, have not been audited at this time.

The audited 2013 financial report will be available at the Rochester Area Foundation office and on the website upon completion of the audit.



Rochester  
Area Foundation

400 South Broadway, Suite 300, Rochester, MN 55904

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**[www.RochesterArea.org](http://www.RochesterArea.org)**



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Standards for US Community Foundations



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