

1944-2014

Better Communities for ALL



Rochester
Area Foundation

INCLUSION

COLLABORATION

INNOVATION

STEWARDSHIP

INTEGRITY

2014 REPORT TO THE COMMUNITY

Grants Given by Rochester Area Foundation in 2014:

Arts

36 Grants

\$83,623

Health/Human Services

193 Grants

\$390,630

Education/Scholarships

263 Grants

\$697,311

Community Development

48 Grants

\$1,022,848

Other

27 Grants

\$94,328

Total

2,288,740

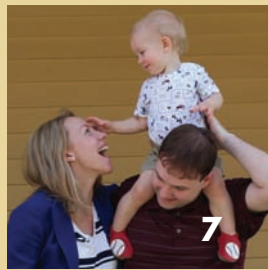
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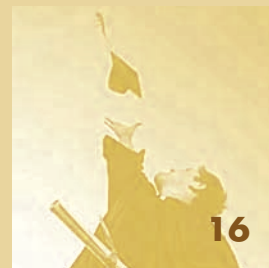
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2014 Rochester Area Foundation Board of Trustees



CHAIR
Hugh Smith
Mayo Clinic,
retired



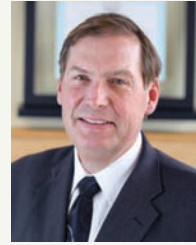
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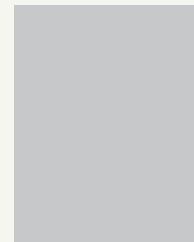
Mark Utz
Wendland Utz, Ltd.



Karel Weigel
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Independent
Journalist/Filmmaker



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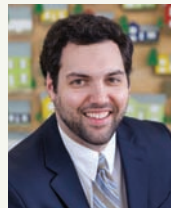
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Development
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Max Evans
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Assistant



Ann Fahy-Gust
Donor Services &
Grants Manager



Paul Harkess
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Cheryl Key
First Homes
Program Officer



Shirley Lee
First Homes
Program Officer

1944

In December 1944, The Rochester Community Foundation was born. On Dec. 5 of that year, the Mayo Properties Association, now the Mayo Foundation, transferred an unconditional gift of \$3,500 (equal to \$45,000 today) to the newly formed Foundation.

COMMITTEES AND BOARDS

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Howard E. West
Nedra M. Wicks
Barbara B. Withers
John Withers
Ralph Wright, Ph.D.
Kenneth Zubay

1945

In January 1945, the Rochester Community Foundation filed incorporation papers with the state of Minnesota. Harry J. Harwick was elected its first chairman.

From the Board Chair and President

Dear Friends,

Philanthropy is personal. Every donor is extraordinary!

Whatever your passion, however your giving is guided, you are a part of a remarkable tradition. You are encouraging growth by supporting initiatives in a wide variety of fields and, ultimately, providing strength to communities in the greater Rochester area.

This year's annual report focuses on the beginning of the Rochester Area Foundation's 70th anniversary. One of the best ways to examine and celebrate these 70 years is to reflect on the many individuals who have created and governed the Foundation as well as the countless persons whose lives have been changed positively by its work. This annual report contains many of their stories. You may recognize these individuals as your friends, neighbors, or colleagues. We know them as community change-makers, connectors, and even superheroes. Our donors are the true creators of this Foundation. Their tangible generosity and charitable commitments have resulted in a Foundation that is a truly inspiring, permanent community resource.

Thanks to knowledgeable leadership combined with significant resources, the Foundation has given thousands of charitable grants throughout the years. It is overwhelming to try to imagine all of the positive consequences of our 70 years of grantmaking, but they include creating opportunity, encouraging healthy living, and enhancing lives in the greater Rochester area.

Accountability to the communities we serve is also a hallmark of our service. In 2014, we received \$2,342,019 in gifts, and 24 new funds were established. Our investments averaged 5.5 percent for the year, continuing to follow the overall economic volatility. With a spending policy based on rolling quarter averages, and despite the downturn, we were able to grant more than \$2,288,740 to local nonprofits supporting our communities.

Finally, we thank you for your constant support and trust. As we honor our mission to, **"build and improve the quality of life in the greater Rochester area through philanthropic leadership and community partnerships,"** we are ready to address the changing philanthropic needs of the generations ahead by continuing to build **Better Communities for ALL.**

As we celebrate the occasion of the Rochester Area Foundation's 70th anniversary, we also look forward to the next 70 years...and the BIG things planned for the future. On behalf of the Board of Trustees and the staff of the Rochester Area Foundation, we hope you enjoy this annual report. And if you are not yet a part of our philanthropic family, we encourage you to join us in building **Better Communities for ALL.**

Sincerely,



Hugh Smith, Chair



JoAnn Stormer, President



Save the Date: Celebration of Philanthropy

Thursday, October 8 at 5:30pm | Hilton DoubleTree Rochester

Grant awards will be announced and new donors will be recognized; feel free to bring a guest!

RSVP to (507) 282-0203 or Mariah@rochesterarea.org.

Celebrating 70 Years and Looking Forward to the Next 70...

Better Communities for ALL. 70 Years
Rochester Area Foundation

Arts & Culture	Inclusion	Youth Mentorship	Philanthropy
Environment	Stewardship	Housing	Grant Making
Collaboration	Health & Science	Leadership	Integrity
Accelerator	Incubator	Innovation	Education

Since 1944, the Rochester Area Foundation, through its donors, partners, and First Homes and Impact Finance programs, has been building **Better Communities for ALL**. Community foundations are critical to the quality of life in the areas they serve.

We encourage you to learn more about your community foundation and how it is helping to build Better Communities for ALL at www.rochesterarea.org. Give a gift today to the Better Communities Fund that will improve the quality of life in the greater Rochester area! See the inserted card on how to donate.

The businesses listed below share the Rochester Area Foundation's commitment to building **Better Communities for ALL**. Their trust has assisted us in pursuing the mission the Rochester Area Foundation was tasked with in 1944. They understand the importance of a strong, vibrant community foundation and that it is critical to improving the quality of life for everyone within its reach. Together, we will continue this work, spreading philanthropy and the importance of community partnerships throughout our area. A big THANK YOU to all of our sponsors for a successful 2014 in philanthropy:

Alvin E. Benike, Inc. General Contractor Since 1937			
	SMITH-SCHAFFER & ASSOCIATES, LTD. Certified Public Accountants and Consultants	DOUBLETREE BY HILTON	MERIT BUILDING ENCLOSURE SYSTEMS
	MAYO CLINIC	WEIS builders	DUNLAP & SEEGER A PROFESSIONAL ASSOCIATION

First Homes Community Land Trust Solving the Housing Crisis One Home at a Time



Motivated by the mission that everyone should be able to enjoy home ownership, First Homes is crafting a plan in response to the future housing crisis in Olmsted County.

In autumn 2013, the Rochester Area Foundation partnered with the Mayo Clinic and Olmsted County to host a community summit on the county's housing needs. As a result of that meeting, the Maxfield Research Group, Inc., was retained to study the housing supply and predicted demand in Olmsted County for the next 20 years. In May 2014, the results were made public and indicated that the county is facing a crisis in the lack of workforce-priced rental units, for-sale workforce houses, and senior housing facilities.

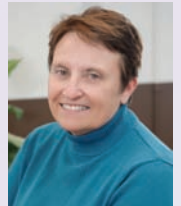
In response, the Rochester Area Foundation, Olmsted County, and Mayo Clinic have taken the lead in developing a plan to meet future demand. The staff at the Greater Minnesota Housing Fund has generously provided expertise and leadership. In 2015, a plan to address housing countywide will be completed.

What is First Homes role in the housing crisis? The First Homes Board of Directors has determined that First Homes should be a community leader in the future just as it has been for the past 15 years. The board has begun crafting a plan that facilitates the creation of additional workforce-priced homes. This involves providing gap loans for mortgage down payment assistance, as in the past, and expanding the Community Land Trust (CLT) program, which already provides workforce-priced homes in the greater Rochester community.

In 2014, the CLT was focused on program maintenance, marketing and selling homes to new homeowners, revising the ground lease structure, and preparing for the future. The CLT currently consists of 208 single-family properties. Shirley Lee, the in-house real estate agent and program leader, facilitated the re-sale of 14 CLT homes. Additional CLT homes will be provided by acquiring distressed properties, rehabilitating them, and selling them to qualified homeowners. In October 2014, the CLT was awarded a Community Development Block Grant for \$63,000 from the City of Rochester. It will be used to acquire and renovate up to two homes. The first was purchased in December 2014 and will be renovated this year.

A Sincere Thank You...

First Homes wishes a fond retirement farewell to long-time, loyal staff member and First Homes supporter Cheryl Key, who was hired in 2001 at a time when First Homes was in its infancy. She has assisted hundreds of CLT homeowners and gap loan recipients in navigating the home-buying process. Through the First Homes program, Cheryl has helped make homeownership a reality for hundreds of families. She was recently elected as a Wabasha County Commissioner and will continue using her expertise to affect public policy in her home county.



"We're excited and energized about our future," says Steve Borchardt, Development Officer with the Rochester Area Foundation. "We look back on past accomplishments with pride and with great appreciation for the contributions of all past and present First Homes staff. And we look forward, not content to rest on our laurels but, rather, motivated to carry on and expand on our mission so that the benefits of home ownership can be enjoyed by our hard-working, essential-service-providing citizens."

– Steve Borchardt

1948

In 1948, the Foundation made its first grant of \$5,000 (equal to \$65,000 today) to assist with the development of a Girl Scout camp.

Karli & Brandon – First Homes Community Land Trust Homeowners

Karli has been a First Homes Board Member since October 2014

In 2012, my husband Brandon and I were living in a small, upper-level duplex close to downtown Rochester. We had looked into buying a home, but having recently married and graduated college with significant student-loan debt, we were unable to make the typical down payment to purchase one—let alone afford a monthly mortgage.

In early 2013, we were expecting our first child. For the rest of that year, we anxiously looked for an apartment in a decent neighborhood, but found that many units were either too expensive for our budget or were full. Our son was born in October 2013. Back home in our one-bedroom apartment, we had to take the door off of our walk-in closet to put our newborn's crib inside. It was then that we knew we needed to get out of there.

A few weeks later, my mom forwarded me a link to a beautiful, energy-efficient, older home listed in First Home's Community Land Trust program. She told me to look into the program as it was geared toward low- to moderate-income first-time homebuyers. After doing more research, we discovered that First Homes does not require a large down

payment and that they also pay the subsidy of the home's lot—meaning that my husband and I would own the house and make improvements but pay a renewable lease to First Homes for the lot. Not paying for the lot meant the monthly mortgage was comparable to what we were currently paying for rent on our small one-bedroom duplex.

After viewing the home with First Homes' Program Officer Shirley Lee, we were in love with it. It was a foursquare home that was turnkey and located in a great school district. Six months later, we moved into our new house! During our first night there, with all of our stuff still in boxes, my husband and I kept saying that we never thought we would live in such a nice house. We did not think it was ever going to be possible.

We are so thankful for the First Homes program and its staff. Their assistance and first-time homebuyer class made the process simple and straightforward. More importantly, it allowed us to stay in Rochester near our families and raise our son in a stable environment.



Left to right: Karli, James, Brandon

"...we moved into our new house! During our first night there, with all of our stuff still in boxes, my husband and I kept saying that we never thought we would live in such a nice house. We did not think it was ever going to be possible."

- Karli

2000

In 2000, First Homes was created to provide starter homes for working families.

2002

In 2002, First Homes created the Community Land Trust (CLT), which allows homes in the program to remain affordable in perpetuity.

1949

In 1949, the Foundation received its first major bequest from Jennie E. Mo of Byron. With careful investment through that years, that fund has paid out several times the original investment in total grants to benefit the community.

Natalie & Ash – First Homes Community Land Trust Homeowners

Natalie has been a First Homes Board Member since February 2013

My homeownership journey began in early 2004. I was 26 years old, had a 1-year-old daughter and another child on the way. My boyfriend of six years and I weren't really sure what the future held. What I did know was that I wanted a stable place to raise my family.

I had been renting apartments since college; I knew I was giving my money away. At the time, I was working as a teller at Wells Fargo and learning more about the benefits of homeownership. One of the mortgage reps at work encouraged me to see if I qualified for any home ownership programs. I had good credit, but my income was limited. I found out that what I was eligible for was enough to buy a home that would need a lot of work. My co-worker even suggested looking into mobile homes as an option. He did some research for me and soon introduced me to another Wells Fargo mortgage rep, Pam Bleifus. She let me know about a program through First Homes.

Pam and I went through the steps to see if I qualified, and I did. She explained how the program worked and let me know that I would be able to move into a new home but that I would not own the land. I was also eligible for a subsidy

that helped me qualify for the home. Soon, I was putting down earnest money and meeting with the builder. The representative at Dewitz reviewed flooring, carpeting, countertop options, and gave me the blueprints to the property. I got to see the lot and was given a timeframe for when the construction would be completed. I was so excited! It was an awesome experience to watch my home being built from the ground up. It gave me such a sense of pride. On June 21, 2004, I gave birth to my son, Emanuel. On July 1, I closed on my brand-new home. It's now 11 years later, we have three kids, I still work at Wells Fargo, and we still reside in the house we watched being built.

Being a First Homes homeowner has provided my family with many opportunities. It has given us a safe neighborhood where our children can grow, a place to call our own, and allowed us to provide for our children financially and afford to get them involved in extracurricular activities and other programs to foster their learning. It also has given us a sense of security and belonging like many other homeowners feel. I am very grateful to First Homes for how it has helped me, my family, and others like us within the community.

"Being a First Homes homeowner has provided my family with many opportunities. It has given us a safe neighborhood where our children can grow, a place to call our own, and allowed us to provide for our children financially and afford to get them involved in extracurricular activities and other programs to foster their learning."

- Natalie



*Back Left to right: Ash & Natalie
Front Left to right: Manny, Abby & Yezi*

2004

In 2004, First Homes created the Heritage Homes program tasked with rehabilitating older homes in the downtown neighborhood core area in Rochester.

2009

The Foundation received \$2.8 million in foreclosure remediation, allowing First Homes to begin the Neighborhood Stabilization Program turning more than 50 foreclosed properties in Rochester's downtown neighborhoods into community assets.

1961

In 1961, the Rochester Community Foundation changed its name to the Rochester Foundation.

Impact Finance Helping Communities Grow



One Rochester Area Foundation initiative helps people in seven local counties afford home ownership. Impact Finance, a Community Development Financial Institution formerly known as Rochester Community Finance (RCF), helps communities grow by providing down payment assistance lending so low- and moderate-income families can attain affordable housing. It also provides technical assistance to nonprofit organizations, helping them grow organizational capacity and increase their ability to serve clients. Both growth strategies, down payment assistance and technical assistance to nonprofits, support communities and help them become sustainable, thriving places where people *want* to be.

To help individuals realize their dreams of homeownership through down payment assistance lending, Impact Finance works with local community banks to identify families that would benefit from the service. The partnership with community banks is critical to the ability to serve multiple communities in multiple counties. "Our partners know that neighborhoods benefit when homes are occupied. Evidence shows that children learn better when they are able to stay in the same school, and communities prosper when people are proud to live within them," says Ann Fahy Gust, Grants and Donor Services Manager for the Rochester Area Foundation, and the lead staff member for Impact Finance.

The loan program, coupled with technical assistance in budgeting and planning, helps individuals manage their money better, save for the future, and repay the lending

opportunity they receive through it. As loans are repaid, Impact Finance re-lends to other families seeking to realize their dreams. The opportunity is multiplied.

Likewise, nonprofit organizations can realize their dreams by increasing their capacities to serve constituents through technical assistance, support, and education. Impact Finance offers seminars and training sessions for sharing best practices across a wide range of nonprofit organizations, one-on-one technical assistance and mentoring with professionals in specific fields who teach organizational effectiveness skills, and a cadre of volunteer professionals who assist with organizational change to generate sustainability. "We believe that strong nonprofits support local communities, provide jobs for individuals, support those who use their services and enable them to live fuller more productive lives, which, in turn, support community growth," says Fahy-Gust.



Ann Fahy-Gust
Grants and Impact Officer

What is a CDFI?

Community Development Financial Institutions (CDFIs) were created by the Riegle-Neal Act of 1994 that expanded the Community Reinvestment Act legislation to act as financial aids to develop low- and moderate-income areas and financial tools for underserved individuals. CDFIs are certified by the United States Treasury every five years and must prove they follow the primary mission of serving low- and moderate-income target areas and individuals. CDFIs are nonprofit and non-governmental financial entities that can partner with traditional banking institutions to support community development. Impact Finance serves a designated target market of the seven counties surrounding and including Olmsted County. It is designed to support down payment assistance lending for affordable housing and nonprofit capacity building through technical assistance organizational growth development.



OLMSTED
MEDICAL
CENTER

GOOD HEALTH STARTS WITH GREAT CARE.®

Olmsted Medical Center Grant Meets Infant Critical Care Needs

The recently constructed 80,000 square foot, \$25 million Women's Health Pavilion at 4th Street SE in Rochester means Olmsted Medical Center (OMC) is providing women, their families, and newborn babies with a level of care and comfort that was not possible previously. Nowhere is that care more critical than on the second floor Birth Center. This is where newborns meet their mothers for the first time. It's also where some newborns and those born prematurely require more acute care and attention.

To ensure those needs are met, OMC staff contacted the Rochester Area Foundation and applied for a grant to purchase two incubators. The grant was approved, and in November, the incubators went into use in the newly finished Birth Center. Longtime OMC staff member Brenda Zeigler, who oversees the Birth Center, says the incubators have been crucial to enhancing the level of care the OMC provides. "We place a high priority on privacy in the new Birth Center, and the incubators allow staff to perform a variety of tasks with minimal interruption to the newborn," says Zeigler. "We were using simple warmers from the 1980s before, and the technology available to us in these new incubators has greatly improved our quality of care and the child's comfort level."

Typically, the incubators are used by Level 2 newborns, those needing more attention than Level 1 babies who are born "on-time." Level 2 babies are born around 34 weeks or later and weigh at least 3.3 pounds. They may have health problems but none that are serious. The incubators also can be used for babies that need equipment to help them breathe for the first 24 hours after delivery. If additional care is needed, the OMC has partnered with Mayo Clinic to provide Level 3 and Level 4 care in the Neonatal Intensive Care Unit. Since staff members between the two facilities are in constant communication, any necessary transfers can happen immediately.

Features of the new incubators include a highly sensitive scale, comfortable padding, a temperature monitor, a rotating changing table, and a phototherapy light, which helps break down red blood cells, preventing jaundice in newborns. "Some machines are even more expensive, but



we were very careful about choosing the devices that would best suit our patients," says Kathie Lohmann, an OMC employee for the past 28 years. "These incubators are so convenient for our staff and help us provide the most efficient care. It's reassuring for new mothers to know their newborn is being well taken care of in a more private setting. It can be a very emotional time for the mothers, to see their child need more support, and these incubators make things go much more smoothly."

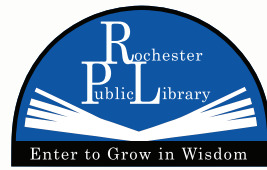
In applying for the grant, Zeigler worked with OMC Development Officer Dave Herder to build on OMC's existing relationship with the Rochester Area Foundation and clarify how the money would improve the quality of care for patients. "Working with the Foundation was very easy. Its staff explained the process and the documentation that was needed on our end in order to get approval for the grant," says Herder. "The money was, of course, important, but through working with the Foundation, we were able to get the message out on what OMC is able to do. That was an important part of the process," he adds.

The Birth Center and the conveniences of the new incubators means OMC patients experience labor, delivery, and recovery all in one room without switching locations, which is common practice at many hospitals. This change at OMC "allows the patient to build a better relationship with their healthcare staff and helps alleviate some of the stress that can come with giving birth," says Zeigler. "We have served about 15 Level 2 newborns since we opened in November and the response from mothers and families has been wonderful. We are very happy to have this new equipment and to provide care of this kind."

1978

In 1978, the Rochester Foundation changed its name to the Rochester Area Foundation and gave out its first grant to outside of Rochester, \$1,000 (equal to \$3,500) to the Chatfield Brass Band.

The Rochester Reading Champions Program Positively Impacting Literacy in Olmsted County



Did you know that, according to the National Institute for Literacy, 75 percent of unemployed adults have reading or writing difficulties? Even a small improvement in the literacy in this population would have a significant impact on the local economy, communities, and neighborhoods, which is why the Rochester Public Library (RPL) and The Reading Center collaborated with other invested partners on a new literacy program, Rochester Reading Champions.

It began in 2012, when the RPL underwent a strategic planning process that involved asking more than 30 community stakeholders—such as members of the business community, home-schooled students, parents, the public school superintendent, university chancellor, local nonprofits serving children, the workforce, the disability community, seniors, philanthropists, and others—what their vision of the community was and how the RPL fit into that vision. What evolved was a collective focus on the need to improve literacy.

In 2013, RPL began identifying where gaps existed in providing literacy assistance to youth and adults in the Rochester area. When they discovered The Reading Center, a nonprofit organization which helps identify learning issues among children and adults and provides specialized assistance, they discovered a critical partner in The Reading Center in achieving literacy improvement. Cindy Russell, Executive Director of The Reading Center, says, “We shared information with the library staff on how prevalent dyslexia is and how, while it is the most common reading disability, few people with dyslexia know they have it. We work very hard to educate people on how to identify whether they or their children have it.”

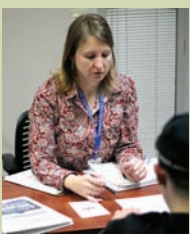
The Reading Center also trains volunteers or parents in the Orton-Gillingham approach, which it has used for more than 60 years to overcome the challenges associated with reading. The problem? While 17 percent of children have a reading disorder, The Reading Center was only serving 5-8 percent of those. The obstacle to serving more people comes down to the costs associated with tutoring, transportation, and timing.

Even though The Reading Center provides scholarships for its services, the scholarships don’t cover everything. Since many potential beneficiaries are at or below poverty level, they are not likely to seek assistance.

Partnering with RPL provided the opportunity for both organizations to reach more children and adults in need of tutoring. “This is a partnership on steroids,” says Audrey Betcher, RPL director. “Rochester Reading Champions would not succeed without the high level of commitment from each partner organization.” Additional partners include the Boys & Girls Club, the Olmsted County Adult Detention Center, and the Minnesota Adult and Teen Challenge. Staff at each site identifies people who need tutoring as well as potential tutors. The Boys and Girls Club sends letters to parents letting them know about the services available and invites them to contact staff if they believe their child could benefit from the program. At the Adult Detention Center, inmates are given a questionnaire that identifies if they are dyslexic and interested in getting help. Each partner organization has shared resources to make the recruitment and instruction of tutors a sustainable model.

“What is so different about this program is the level of community engagement,” Betcher says. “Nobody has enough resources to provide all of the tutors, but we have a lot of engaged, highly educated people in this community who really understand how critical literacy is for life-long success.” In the end, she adds, “This is really about partnership, focusing on what the community says is important, and figuring out how to do something about it. It says a lot about this community and what it values.”

None of it would have been possible without the help and support of the Rochester Area Foundation. “The Foundation was the first organization to believe in us and that credibility leveraged other contributions,” says Betcher. “The partnership was just as important as the money, and being able to go to other funders with the Foundation’s support was absolutely instrumental.”



Become a Reading Champion

Reading Champions, or tutors, are trained by The Reading Center through lecture and practicum throughout 120 hours. A two-year commitment to tutoring 45 - 60 minutes twice weekly, which does not include lesson planning, is required. Finding volunteers is the most important part of the continued success and expansion of the program. “This program has been a great way for organizations that care about community members and literacy in Olmsted County to make a real and lasting impact on helping people with difficult reading skills to permanently change those skills for the better,” says Cindy Russell, executive director of The Reading Center. For information on becoming a Champion, visit <http://www.rochesterpubliclibrary.org/champions/index.html> or call Gail Harris at (507) 328-2341.

ROCHESTER AREA FOUNDATION

Better Communities for ALL.

CELEBRATING 70 YEARS OF PHILANTHROPY

Rochester Area Foundation, through generous donations from its donors, gave out grants to these organizations in 2014. Many received multiple donations. We thank our own donors for making this possible.

Ability Building Center	Century High School	Dodge County Historical Society
Accessible Space	Channel One Regional Food Bank	Dodge County United Way
Aldrich Memorial Nursery School	Chaffield Brass Band Lending Library	Dodge County Young Riders 4H Club
Alliance Defending Freedom	Chaffield Firefighter's Fund	Dorothy Day Hospitality House
ALS Minnesota Chapter	Children's Cancer Center	Duke University
ALS Walk	Children's Conference	Eagle Bluff Environmental Education Center
American Cancer Society	Children's Museum Rochester	Eaton Hill Nature Center
American Diabetes Association	Choral Arts Ensemble	Echo Food Shelf
American Guild Organists	Chosen Valley Community Foundation	Elder Network
American Heart Association	Christ Community Church	Euro Football Club
American Jewish World Service	Christ United Methodist	Evergreen Cemetery
American Red Cross	Christmas Anonymous	Fairview Care Center
Angel Foundation	Church of Red Rocks	Faith in Action
Anna Marie's Alliance	Church of the Saviour	Family Means
AOFAS	City of Dodge Center	Father Woody's Haven of Hope
Apple Tree Dental	City of Lanesboro	Feed My People
Arizona Christian College	Coldwater Foundation	Game Fund AZ State
Arkansas University	Collaborative Leadership Fellows	Gamehaven Council Boy Scouts of America
Autumn Ridge Church	Commonweal Theatre	Georgetown University
Baltimore School Performing Arts	Community Dental	Gift of Life Transplant House
Beacon Academy	Community Food Response	Gillette Children's Hospital
Bear Creek Services	Community Presbyterian	Girl Scouts River Valleys
Bike - Multiple Sclerosis	Community Tennis Center	Gloria Dei Church
Black Data Processing Association	Community Ventures	Good Earth Village
Bolder Options	Compassionate Ocean Dharma	Grace Foundation
Bolton Refuge House	Concordia University	Habitat for Humanity Rochester
Boys & Girls Club Bemidji	Congregation Shir Tikvah	Habitat for Humanity St. Cloud
Boys & Girls Club Rochester	Cut Circle	Hamline University
Brains Together	Damiano Center	Hawthorne Education Center
Brighter Tomorrows	Diocese of Winona	HERO program- Triton Elementary School
Byron Community Foundation	Disabled American Veterans of Minnesota	Hiawatha Homes Foundation
Calvary Episcopal	Distant Relatives	Highlands Church
Camp Olson	Doctors Without Borders	History Center of Olmsted County
Camp Victory	Dodge Center Foundation	Holy Family School
Catholic Charities	Dodge Center Library	Holy Spirit Catholic Church
Central Reform Congregation	Dodge Center United Methodist Church	Honors Choirs
Centro Campesino	Dodge County Food Shelf	Hope Lodge

- Hope Seeds
- Hosanna Lutheran Church
- I Know I Can Read
- Interfaith Hospitality Network
- International Orthodox Christian Charities
- Iowa University
- Ironwood Springs Christian Camp
- Jared Allen's Wounded Warriors
- Join the Journey
- Just Faith
- Kasson Library
- Kasson Mantorville Care & Share
- Kasson Mantorville FCCLA
- Kasson Mantorville Girl Scouts
- Kasson Mantorville Public Schools
- Kasson United Methodist Church
- Knights of Columbus
- La Courte O'Rilles
- Lake City Law Enforcement
- Lake Zumbro Forever
- Legal Aid Olmsted County
- Madonna Living Community Foundation
- Mankato State University
- Mantorville Theatre
- Mayo Clinic Research
- Mayo High School Drama Club
- Mayo Wrestling Association
- Mens Club - Pax Christi Church
- Mid-America Orthopedic Association
- Mindset Foundation
- Minnesota Adult & Teen Challenge
- Minnesota Assistance Council for Veterans
- Minnesota Center
- Minnesota Council of Nonprofits
- Minnesota Land Trust
- Minnesota Marine Art Museum
- Minnesota Public Radio
- Minnesota Veterans & Emergency Services Museum
- Minnesota Zoo Foundation
- Miracle Field
- Muscular Dystrophy Association
- National Alliance on Mental Health Institute
- National Multiple Sclerosis Association
- Navigators
- New Beginnings
- North Shore Health Care Foundation
- Northern Lights Foundation
- Oasis Pregnancy
- Olmsted Area Development Corporation
- Olmsted Medical Center Foundation
- OMC Womens Health Pavillion
- Orthopaedic Research and Education Foundation
- Oxbow Park
- Paralyzed Veterans
- Pasco Co Special Olympics
- Paws & Claws
- Pax Christi Church
- Peace United Methodist Church
- Pine Island Boy Scouts
- Pine Island Girl Scouts
- Placerville Camp
- Planned Parenthood MN, SD, ND
- Pleasant Prairie Cemetery
- Poblo Ministries
- PossaAbilities
- Project Zwadi
- Providence Academy
- Quarry Hill Nature Center
- Red Siems Fundraiser
- Redeemer Lutheran Church
- Rochester Area Family Y
- Rochester Art Center
- Rochester Arts Council
- Rochester Central Lutheran School
- Rochester Chamber Music
- Rochester Civic Theatre
- Rochester Community and Technical College Foundation
- Rochester Friends
- Rochester Institute of Technology
- Rochester Music Guild
- Rochester Public Library
- Rochester Public Library Foundation
- Rochester Rotary Club
- Rochester Salute to the 4th
- Rochester Symphony Orchestra & Chorale
- Rocket Wrestling Club
- Ronald McDonald House Charities Denver
- Ronald McDonald House Charities Rochester
- Rotary Foundation
- Ruckelshaus Foundation
- Safe Haven
- Salvation Army Mankato
- Salvation Army Rochester
- Scottsdale Healthcare Foundation
- Season's Hospice
- Second Harvest Food Bank
- Seeds of Wisdom
- ServeMinnesota
- Sharing & Caring Hands
- Sisters of St. Francis
- Sloan Kettering
- Soldiers Field Veteran's Memorial
- Soulumination
- South Central Service Cooperative
- South Dakota State University Foundation
- Southeast Minnesota Youth Orchestra
- Southern Minnesota Initiative Foundation
- Spare Key
- Special Olympics
- Spider Lake Improvement
- Sports Mentorship Academy
- St. Cloud State University
- St. Olaf University
- St. Benedict University
- St. Cloud Children's Home
- St. Francis of Assisi Church
- St. John's Catholic Church
- St. Luke's Episcopal Church
- St. Paul United Church of Christ
- St. Peter's Episcopal Church
- St. Pius X Catholic Church
- Stewartville Area Foundation
- Stewartville History Center
- Superior Hiking Trails
- The Arc of SE MN
- The Arthritis Foundation
- The Reading Center
- Trinity College
- Triton Public Schools
- Turn the Lights On
- Union Gospel Mission
- United Way of Olmsted County
- United Way of St. Louis County
- University of Minnesota – Crookston
- University of Minnesota – Duluth
- University of Minnesota – Twin Cities
- University of Notre Dame
- University of Wisconsin – La Crosse
- University of Wisconsin – Eau Claire
- VFW Foundation
- Volunteers Enlisted to Assist People
- weGive365
- Wing House
- Winona Diocese
- Winona State University
- Women's Shelter
- Wounded Warrior Project
- Young America Foundation
- Youth Mentorship Rochester Public Schools
- Youth Outreach United
- Zumbro Rendevous
- Zumbro Valley Audubon
- Zumbro Valley Mental Health Center



JMHS Class of 1964 Scholarship Remembering the Past, Ensuring the Future

Reunions—whether with family members, old friends, or classmates—are wonderful opportunities to celebrate and reminisce. Yet for the alumni of the John Marshall High School (JMHS) Class of 1964, their 50th class reunion was also about saying, “Thank you,” and leaving behind a legacy.

“As we prepared for the reunion, our dedicated committee explored ways to celebrate this milestone in a meaningful and lasting way,” says Alison Bach Good, reunion planning committee member. “We proposed an ambitious goal to endow a JMHS Class of 1964 Scholarship as a way to honor and convey our gratitude to the faculty, staff, and community for the excellent public education we received and to our families and friends who supported us.”

To get the ball rolling in 2013, Bach Good contacted classmates Cindy Kingsbury Wollaegeer, now living in La Jolla, Calif., who has fundraising experience, and Nancy Cook Nelson, a retired Denver bank executive. Drawing on the natural synergy of their lifelong friendships and their individual professional skills, they created a “dream team” to lead the campaign.

In a conference call, they discussed their scholarship fundraising goal with Rochester Area Foundation President JoAnn Stormer and Grants & Donor Services Manager Ann Fahy-Gust, who later met with the Rochester Public School Foundation. Both Foundations were excited about the idea. In support of the scholarship effort, the Rochester Area Foundation generously agreed.

Subsequently, Ginger Kerr, a JMHS counseling staff member, agreed to cover PayPal fees for donors and send letters to them as well. Next, classmates were contacted by phone, email, and mail. Classmate webmaster Peter Czok of Rochester provided campaign updates and recognition on the 50th reunion website JM6450.com.

Reunion weekend was held in September 2014, and 186 classmates, spouses, partners, and guests celebrated, reconnected, and recaptured the joys of youth. During Friday night’s opening remarks, Rev. Larry Boutelle, a classmate and retired minister from Kalamazoo, Mich., said, “Rejoice with one another—remembering our shared past, the blessings of those who pushed and encouraged and opened doors for us. We remember those who taught us and coached us, scout leaders and activity advisors who gave us space and direction in which to grow.”



JMHS tour with Principal Tim Limberg.

1983

In 1983, the Foundation's assets reached \$1 million.

On Saturday morning, classmates toured JMHS with Principal Tim Limberg and were impressed with the improvements that had been made throughout the years. "We were moved to see how diverse the student body has become and learn that most students will need financial help with their post-secondary education," says Kingsbury Wollaeger. "The students with whom we talked conveyed a confidence in their future and an appreciation for their education. A faculty reception in the cafeteria following the tour provided a heartwarming visit with a number of our former teachers."

In the afternoon, a common book discussion was held at the University of Minnesota—Rochester. It was led by two classmates: Anne Colby, a Stanford University consulting professor and author, and Dave Nelson, presiding judge of the Superior Court of California, County of Mendocino. After a gala buffet dinner on the Peace Plaza, more classmates were inspired to give to the scholarship fund, and many others were inspired to give more.

In a year-end effort, a generous classmate offered an appreciated stock match up to \$2,500 when the campaign reached \$22,500. Through the generosity of more than 70 classmates, friends, and faculty, and the dedicated efforts of the Reunion Planning Committee, the scholarship fundraising goal was reached in 2014.



John Marshall Class of 1964 50th Reunion Planning Committee members, standing, l-r: Jim Young, Jim Suk, Patricia Larson Kraemer, Peter Czok, Cynthia Gentling, Chuck Springer, Alison Bach Good, Sharon Anderson Knutson, and Nancy Cook Nelson. Seated, l-r: Kaye Andrist Young, Cynthia Kingsbury Wollaeger, and Nancie Litin. Absent: Kris Miller Aliotti.

Give us a

G

for the generosity of all who contributed to the endowed **JMHS Class of 1964 Scholarship** and to those who will contribute in the future.

Give us an

O

for the opportunities deserving JMHS graduates will have for post-secondary education at accredited institutions of their choice.

Give us an

A

for achieving such an ambitious goal through teamwork and philanthropic spirit.

Give us an

L

for a legacy of leadership as the first Rochester Public School alumni class to endow a scholarship through the Rochester Area Foundation.

"The students with whom we talked conveyed a confidence in their future and an appreciation for their education. A faculty reception in the cafeteria following the tour provided a heartwarming visit with a number of our former teachers."

– Cindy Kingsbury Wollaeger

1985

The Foundation celebrated its 40th anniversary in 1985. During its first 40 years, assets grew to \$1.3 million with more than \$1 million awarded in grants.

Agency Endowment Fund GRAUC is Building Tomorrow's Future Today



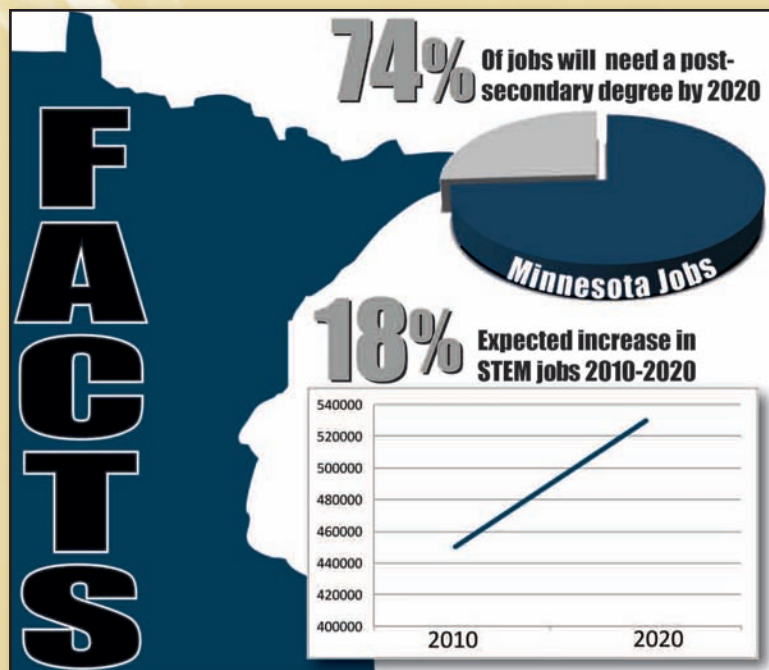
When Minnesota state universities were being located, the once sleepy community of Rochester probably wasn't even on the radar. That's because no one could imagine it would one day prosper and become home to a world-class medical facility. Though Rochester did become home to three quality higher education opportunities: Rochester Community and Technical College, Winona State University - Rochester, and University of Minnesota - Rochester, the need for additional higher education opportunities remains.

Enter the Greater Rochester Advocates for Universities and Colleges (GRAUC), which encourages and promotes innovative practices that leverage public education resources to best serve students, employers, and the community. Well-known for its advocacy, GRAUC helped secure state higher education capital bonding and local sales tax funds to enable the growth and development of the University Center Rochester and University of Minnesota - Rochester campuses. In addition, its board members actively support the complementary missions of Rochester's three public colleges and universities. With a long-standing tradition of representing the community on education committees and task forces, GRAUC continually seeks to better understand area higher education needs and secure solutions to meet current and future workforce demands.

What does the future hold? Investing in programs and projects that identify gaps between education, industry, and business will help GRAUC build bridges to fill the skilled workforce shortage. GRAUC plans to accomplish this by growing its endowment fund so that individuals interested in creating a link among education, business, and industry can support project grants through the fund. GRAUC's Endowment Fund supports its ability to:

- Enhance and support the growth and improvement of higher education in the Greater Rochester Area.
- Promote partnerships between higher education and other agencies or business and industry.

"GRAUC is well positioned to take an independent, futuristic view to influence partnerships between business, industry, and education," says Hal Henderson, board chair. "We need now, more than ever, a well-skilled, engaged, and highly qualified workforce that contributes to the overall success and growth of the greater Rochester area. Funding of these projects will have a significant and positive impact throughout the region on higher education, economic growth, and return on taxpayer investment."



Assisting the Mission Academy Helps Nonprofits Learn and Grow



A large part of the mission at the Rochester Area Foundation involves helping local nonprofits carry out their missions more effectively. Why? Growing nonprofit organizations helps improve the quality of life for everyone in the area. The goods and services provided by these groups are critical to a safe and stable community. The more effectively a nonprofit is able to function, the better it can serve its constituents.

Yet many nonprofit organizations are small and do not have the resources needed to send their executive directors to expensive conferences and training seminars to learn about best practices. Also, many staff members are not full-time, so committing to travel and all day training is not an option. A local solution was needed. Enter the Rochester Area Foundation, which partnered with the United Way of Olmsted County in 2012 to establish the Nonprofit Academy Seminar Series.

At a space in the United Way of Olmsted County Building, local nonprofit executive directors and employees can attend the Nonprofit Academy's monthly seminars or trainings on particular topics. Organized and arranged for by Ann Fahy-Gust, the Rochester Area Foundation's Donor & Grant Services Manager, last year's topics included:

- Roberts Rules and Effective Meeting Minutes**
- Collective Impact Discussions**
- Volunteer Management**
- Capital Campaign Planning & Healthy Organizations**
- Finance for Nonprofits**
- Board Development**
- Measurement & Leadership**
- Human Resources**

Community members with expertise in certain areas serve as guest speakers. Past speakers include: Michon Rogers, then a

development associate with the University of Minnesota, professionals from the Twin Cities area such as The Improve Group, and national figures like Susan Dreyfus, CEO for the Alliance for Strong Families and Communities. Sessions cost only \$10, which goes toward the lunch or dinner provided during the three hour seminar. The average workshop has 28 attendees, a number that often fills the room and demonstrates a need for the Academy. "It is a great opportunity to have a professional on the given topic share with you everything they know," a recent attendee said. "There are not many options for nonprofits to have best practices shared with them for such a low cost. It is extremely helpful to have these seminars available to organizations that are trying to grow in our community."

Fahy-Gust agrees. "In the two years we have been holding these seminars, word has gotten out, and they are becoming an important part of what the Rochester Area Foundation is doing," she says. "Not only do these seminars help nonprofits, but they also help the Rochester Area Foundation connect with area nonprofits, learn about their plans, and help them accomplish their goals throughout the year."

The future is bright for the Nonprofit Academy, as funding has been secured to grow the scope of the seminars to outside the traditional 30-mile radius of the Rochester Area Foundation. This will be done through the Foundation's Impact Finance initiative. With the larger audience, Fahy-Gust hopes to reach even more organizations from rural, southeastern Minnesota communities with even less access to trainings than Rochester area organizations have. "Market research has shown that there is definitely a need in these other communities, and we are excited for 2015 and beyond," she says. "We really think this is an innovative idea that can help nonprofits get their organizations working as efficiently as possible."



"Not only do these seminars help nonprofits, but they also help the Rochester Area Foundation connect with area nonprofits, learn about their plans, and help them accomplish their goals throughout the year."

– Ann Fahy-Gust

1989

The year 1989 was pivotal in the Foundation's history. Alan and Sharon Tuntland established the first Donor Advised Fund and made the largest gift received by the organization.



Rochester's Salute to the 4th A New Tradition

There's no doubt the City of Rochester fireworks show is popular. Every July 4, an estimated 60,000 city and county residents and visitors gather in the area around Silver Lake to watch the night sky light up with color.

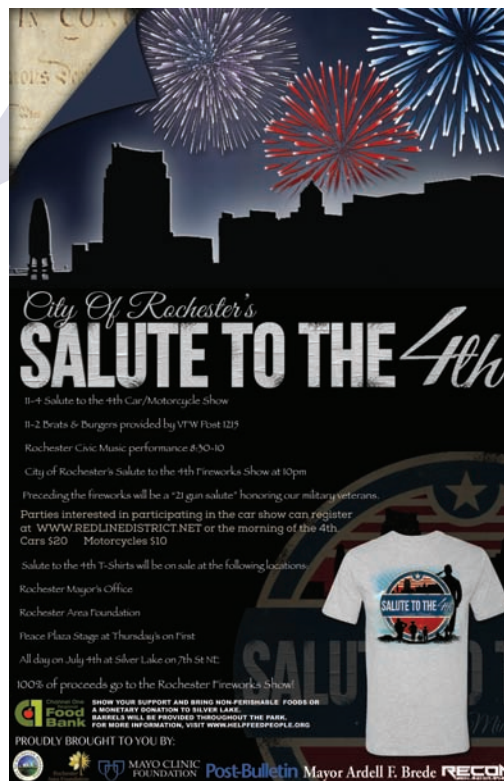
Yet the city of Rochester is faced with the cost for the \$35,000 annual event. Enter Rochester resident Kyle Herring, who saw an opportunity in the tens of thousands of people who gather to celebrate. With the size of the captive audience, Herring envisioned the Salute to the 4th, an Independence Day event that would celebrate the birth of our nation, recognize each branch of the armed forces, and help the City of Rochester pay for the fireworks display.

To make the Salute to the 4th a reality, Herring recruited the help of the Rochester Area Foundation, which was uniquely capable of guiding him through the grant application process and connecting him with likeminded individuals in order to accomplish the task. The Rochester Area Foundation granted the necessary funds to the Salute to the 4th so volunteers could begin planning. In partnership with the City of Rochester, Herring also secured a fiscal agent relationship with the Rochester Area Foundation, making it possible to offer nonprofit status to the group. As a result, any donations given to it are viewed as tax deductible.

With the fiscal agent status in place, Herring enlisted Foundation employees Max Evans and Ann Fahy-Gust to assist with the planning on a volunteer basis. Other early additions to the volunteer team were James Keller, owner of Recon Sign & Graphics and Sankesh "Sunny" Prahbakar, project manager for Mac's Café & Restaurant. Keller donated the logo design for the Salute to the 4th along with the inaugural t-shirt design, while Prahbakar teamed up with local volunteers to hold a car show to kick off the event. With only a few weeks to plan and limited resources, the group secured 50 cars for the show, a walking-tacos food stand sponsored by the VFW, a 2014 Ford Mustang raffle car for display from PossAbilities, and a DJ to provide entertainment throughout the morning and early afternoon of the car show. All monies raised through vendor fees, sponsorships, t-shirt sales, and registrations were given to the City of Rochester to help with the cost of the fireworks show.

While the first year offered a short timeframe and limited resources, the group is excited about the possibilities in 2015. "We have a full year to plan and recruit more volunteers, sponsors and donors," says Prahbakar, co-chair of the event. "This year, we plan on a 7k/4k Salute to the 4th run/walk, an amateur skate show, and a partnership with some national musical acts to have bands performing all day and into the evening. We also are excited to bring together more of the local veterans' groups and bring awareness to their causes."

Involving local veterans' group was the inspiration behind the event title "Salute to the 4th." "We as volunteers understand that while we celebrate our Independence Day we also want to remind people that freedom is not free. Sacrifices have been made by millions of men, women, and families throughout the years that allow us to have the luxuries we enjoy, along with fun fireworks displays in the summer," says Max Evans, a Foundation employee and co-chair of the event.



A photo of the 2014 advertisement for the event in the Post Bulletin."

1993

The trustees applied to the Bush Foundation for a challenge grant. The Bush Foundation awarded the Rochester Area Foundation its first ever endowment challenge grant in October of that year. At the time of the award, the Foundation's assets stood at \$4 million. The terms of the four-year challenge grant provided for a total of \$500,000 in matching funds once the Rochester Area Foundation raised \$3.3 million.



WeGive365

The Definition of Grassroots Philanthropy

It all starts with \$1 a day.

While it may not seem like \$1 a day would amount to much. 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 during its 70-year history, which means the weGive365 fund transforms \$1 gifts into much larger gifts throughout 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 \$2,000 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 in which they truly believe. Sometimes, it is an organization they didn't know existed, so it is a great opportunity for both parties," says Ann Fahy-Gust, the Foundation's donor services and grants manager.

The grant pool has grown since weGive365 was established in 2013. At that time, 50 people joined and \$18,250 was raised in the first year, half of which amounted to \$9,125 for grants. 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.

Together, Eric and Megan Smith were among the early weGive365 members and have now seen their gift be

multiplied into grants to eight different local nonprofits. "We were new to this community and looking for a way to give back. This program is attractive to us because of its creativity and our ability to vote on where we would like the money to go. It is a great way to stay engaged in the needs of the community," Megan says.

Each organization received a \$1,000 grant.

Those needs after year one included:

- **Rochester Women's Shelter** will use their grant to expand their children's program. This includes childcare, support groups, and summer activities!
- **Elder Network** will offer free companion services to nine area seniors who otherwise could not afford them.
- **Rochester Public Library** will pilot an innovative reading program, which is designed for children with autism and aims to increase their literacy.
- **Rochester Rotary Risers** will expand its yearly reading celebration from two to five elementary schools. The celebration is designed to boost children's confidence in their ability to read.
- **The Reading Center** partnered with **Civic League Day Nursery** on a pre-school-aged reading program that implemented new kindergarten preparedness techniques. The program will impact 89 children through the training of 15 staff members.
- **Channel One Regional Food Bank** will use its grant to provide 13 backpacks of food for children for an entire year!
- **SEMCIL** will place an adaptive garden for people with disabilities at their downtown property.
- **Sing Out Loud** will fund a student-led, partnership singing program with Minnesota Children's Museum Rochester.

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/give**.

1997

The Rochester Area Foundation completed the Bush Foundation Challenge Grant Campaign 10 months early, and at the end of 1997 had reached \$10.5 million in assets.

Creating a Culture Change How “MINDSET Matters” in Student Life



Retired U.S. Navy Seal Officer Larry Yatch (co-founder of Mindset Matters) with Kasson-Mantorville Middle School students and faculty.

Middle school and high school environments are different than they were a decade ago. Social media’s influence means unlimited access to friends and family. While this is often a positive force, it can be a conduit for destructive behavior and bullying. Two organizations, MINDSET Matters (MINDSET) and the National Alliance on Mental Illness (NAMI) Southeast Minnesota, give students the necessary tools to change these behaviors while inspiring hope and the power to make a positive difference.

MINDSET focuses on developing eight core leadership traits, building character, and providing bullying prevention strategies for students as early as middle school. “We are giving every child an opportunity to learn and practice

leadership skills, often for the first time in their lives, and to learn how to take positive action not only in school but in their daily lives,” says Todd Alexander, MINDSET Executive Director. That knowledge lays the foundation for the work NAMI does in high school—allowing students to carry the “mindset” as they move through the school system.

A key indicator in suicide prevention is a safe school environment, because the safer students feel, the more likely they are to seek help for mental health concerns. A safe environment empowers students, giving them confidence in their leadership ability and the courage to approach peers or adults if someone they know shows signs they are struggling. NAMI’s “Be A Friend” initiative ensures students

2005

The First Steps school readiness initiative was launched. The First Homes Community Land Trust (CLT) celebrated its 100th home added to the CLT.



understand that help is available if they need support, while MINDSET focuses on providing the leadership skills necessary for those conversations to take place. Both approaches rely on student initiative, since students are the ones likely to notice changes in their friend's behavior. "A lot of times, when a student does find the courage to talk to a friend because they are concerned about their safety, the first reaction from the friend is to get really mad at them," says Courtney Lawson, NAMI Southeast Minnesota executive director. "The skills they are learning, starting with MINDSET at an earlier age, are aimed at helping overcome those initial reactions and being supportive rather than critical."

Though MINDSET and NAMI have begun work on expanding into other Hiawatha Valley League schools, Kasson-Mantorville is the pilot site for research into how this curriculum will impact student life and school culture. "The Rochester Area Foundation saw the potential and helped synchronize the efforts of MINDSET and NAMI in Kasson-Mantorville rather than each of our organizations going it alone," says Alexander.

Lawson agrees. "There are so many people doing good things in our area, but it takes a larger presence to connect the dots between individuals and groups working toward the same goal. The Rochester Area Foundation helped us put the pieces together and look at the broader scope on the continuum of education," she says. The Foundation assisted in strategic planning through a service grant—helping identify the importance of NAMI's work in the schools and how this project fits into its goals.

Though only two years old, the MINDSET curriculum has already been picked up in 10 Boys & Girls Clubs in Minnesota and South Dakota and has commitments from several other Minnesota schools for the 2015-16 school year. Changing the culture is a monumental task, but through collaboration and leadership, MINDSET and NAMI are beginning to impact the lives of hundreds of students in the area.



HVL Leadership Day

In the Hiawatha Valley League (HVL) conference, school rivalries at times have turned ugly, particularly online. Enter the HVL Leadership Day, which offers leadership concepts and relationship-building skills including practical application and reflection. Launched in 2014 and led by retired U.S. Navy SEAL officer Larry Yatch, the HVL Leadership Day gathered 175 HVL students from 10 Southeast Minnesota schools. Facilitators inter-mixed the students so they could work with students from schools other than their own. "I recognized many of these kids because of their accomplishments academically or athletically, yet to hear some of them share how difficult it can be to go to school each day not knowing how they will be judged, was a vivid reminder of why we created MINDSET in the first place," says Todd Alexander, MINDSET executive director. "Here was a girl with a 4.0 GPA, an award-winning athlete, and she stated to the group how it takes courage to go to school because she might wear the wrong thing? The HVL Leadership Day was a powerful experience for the students as well as the school administrator and teachers in attendance. We truly hope this can become an annual event."

2010

In 2010, the First Steps program closed after successfully identifying gaps in early childhood preparedness and after achieving a groundbreaking study on the state of local school readiness.

2014 Donors

Thank you to the following 2014 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.

Mike and Maureen Adkins
 AgStar Financial Services
 David & Susan Ahlquist
 Colin & Pat Aldis
 Kristen Aliotti
 Vicki Allen
 AmazonSmile Foundation
 Gail L. Anderson
 Anonymous
 Mark & Lucy Bahn
 Jack & Carolyn Baker
 Jane Barnhart
 Virginia Barry
 Barbara & J.D. Bartleson
 Garrett Bayrd
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 Lydia Cottrell
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Patrick & Ann Zahasky
Ms. Roxanne E. Ziecina and
Mr. Fred J. Ziecina
Warren and Helen Zimmerman

2014 Honor and Memory Gifts

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

Georgia Scholz
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Lee Blenkush
Michael Klampe
Norman Reopelle
Sheila Howe
Patricia Judd
John Beyerle
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Nina Sudor
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Henry Zamow
Natalie Thornton Webb
Barby Withers
Gordon Branes
Elizabeth LaRoque
Richard Welsh
Emelie Gathje Winters
Bernadine Simons

Gifts were given in honor of the people listed below:

Jane Champion
Barb & Don DeCramer

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Violet Loreen Glasby
Karel Weigel
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The Rea Family
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Al & Sharon Tuntland
Glenn & Ella Van Laningham
Karel Weigel
Joyce M. Wenz
Nedra Morgan Wicks
Ron & Diane Yanish

Rochester Area Foundation & Affiliates

Consolidated Statement of Financial Position
December 31, 2014 and 2013

Assets	2014	2013
Cash and cash equivalents	492,785	85,008
Interest and dividends receivable	12,989	23,469
Pledges receivable	245,500	15,000
Notes receivable	169,753	12,150
Investment in marketable securities	27,308,756	27,624,664
Beneficial interest in trust held by others	619,369	667,751
Loans receivable, net	2,256,094	2,201,471
Other assets	697,489	1,091,374
Land held in Community Land Trust	7,983,584	8,013,584
Total Assets	<u>39,786,319</u>	<u>39,734,471</u>

Liabilities and Net Assets

Liabilities

Accounts payable and accrued expenses	28,588	19,023
Grants payable	48,795	44,200
Program assets held for others	550,081	537,656
Annuities payable and unitrust obligations	676,603	703,724
Notes payable	854,766	1,588,965
Total Liabilities	<u>2,158,833</u>	<u>2,893,568</u>

Commitments

Net Assets

Unrestricted	33,239,732	32,453,149
Temporarily restricted	2,466,110	2,466,110
Permanently restricted	1,921,644	1,921,644
Total Net Assets	<u>37,627,486</u>	<u>36,840,903</u>
Total Liabilities and Net Assets	<u>39,786,319</u>	<u>39,734,471</u>

Audit status – financial results for the year ended December 31, 2014, have not been audited at this time. The audited 2014 financial report will be available at the Rochester Area Foundation office and on the website upon completion of the audit.

2013

In 2013, weGive365 was launched with the goal of making philanthropy achievable for people of all means.



All historic Rochester photographs courtesy of the History Center of Olmsted County | www.olmstedhistory.com | (507) 282-9447



2014

In 2014, The Foundation's assets totaled nearly \$40 million, and \$2.3 million was distributed in grants.



Rochester Area Foundation



Rochester
Area Foundation

400 South Broadway, Suite 300, Rochester, MN 55904

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