



Rochester Area
Foundation

2021 ANNUAL REPORT

Philanthropy **COMES ALIVE**



2021 Grants by Impact Area

Grant Totals: \$3,986,907 | 995 grants



Youth & Family
\$291,661
80 grants



Health & Human Services
\$711,067
352 grants



Community Development
\$975,917
109 grants



Religious
\$616,337
159 grants



Arts
\$53,681
46 grants



Environmental & Animal Welfare
\$49,165
54 grants



Culture & Diversity
\$33,572
14 grants



Disability Services
\$46,450
21 grants



Education
\$776,940
145 grants



Housing
\$432,117
15 grants

A Message

from RAF Leadership

We are extremely blessed to work in the field of philanthropy and witness how charitable giving can increase an organization's capacity, provide the much needed support for a new initiative or support ongoing operations. Equally important, we get the honor of observing how our donors and partners feel when they put philanthropy into action. Our donors and partners have a curiosity to learn about important community issues, they have a strong desire to engage in the process, and possess a strong sense of community that is activated through charitable giving.

Each gift made through Rochester Area Foundation activates a new action, a cause-and-effect model that truly makes philanthropy come alive. Being philanthropic is an action. It is a conscious decision to support others in our community, to provide safe spaces, education, comfort, companionship and more. Gifts through RAF have galvanized positive impact within our area. Some of these gifts are financial, but putting philanthropy into action also includes gifts of time, talent, introduction and advocacy.

"Philanthropy is not about the money, it's about using whatever resources you have at your fingertips and applying them to improve the world," states noted philanthropist Melinda Gates.

Supporting community philanthropy is the work of many. Our success is the result of great partnerships and collaborations. After experiencing a year of unprecedented uncertainty and unknowns in 2020, 2021 burgeoned into a year of continuing to build strong networks of thought leaders, providing perspective and expert content through monthly virtual gatherings, and continuing our legacy of being the leading philanthropic agency in our area.

As you read through our 2021 Annual Report, I hope that you will see how RAF played a pivotal role in making philanthropy come alive in a variety of ways through stories of giving. We are proud of our 77 year history of supporting the greater Rochester area and we thank you for continuing to partner with us as we build better communities for all.

Thank you for joining us in 2021 and making philanthropy come alive.



Jennifer Woodford

President, Rochester Area Foundation



Don Supalla

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Rochester Area Foundation

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 Ralph Wright-Peterson, Ph.D.
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Our Vision:

Building better communities for all.

Our Mission:

Building and enhancing the quality of life in the greater Rochester area through philanthropic leadership and community partnerships.

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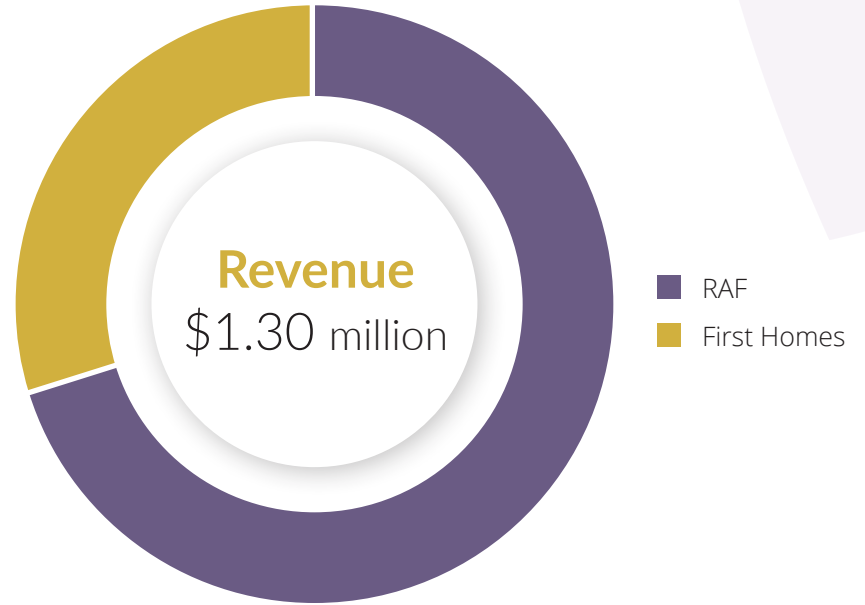
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Income Statement-Operations

Revenue

Rochester Area Foundation	\$910,348
First Homes	\$391,013

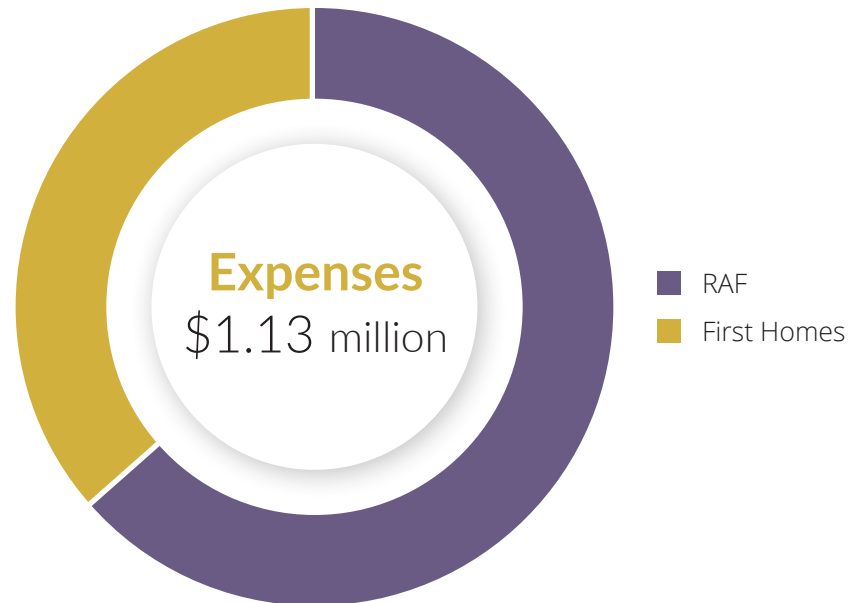
Total **\$1,301,361**



Expenses

Rochester Area Foundation	\$716,984
First Homes	\$413,183

Total **\$1,130,167**



We are dedicated to using our financial resources to improve the quality of life, promote greater equality of opportunities, and to develop effective methods to assist those in need in the greater Rochester Area.

RAF Investment Fund assets constitute an enduring legacy. The Investment Fund is composed of over 180 funds under the categories of Donor Advised, Donor Designated, Agency, Field of Interest, Scholarship, and unrestricted. Many of these funds are endowed to preserve permanency of the asset.

We are proud to steward financial gifts from individuals, nonprofit organizations, and businesses within our portfolio.

- Rochester Area Foundation assets under management as of 12/31/2020 totaled \$55,023,626
- Rochester Area Foundation assets under management as of 12/31/2021 totaled \$59,186,385

The financial graphic shows our operating revenue and expenditures for each of our entities. As there remained a level of uncertainty of what 2021 would bring, we continued to closely monitor revenues and expenditures to ensure that we maintained a strong financial position. The Investment Fund increased by over \$4M from the 2020 year end balance. Throughout our Annual Report we have demonstrated additional ways we have put philanthropy into action in our community.

We were honored to partner with Olmsted County for a fourth disbursement of COVID-19 relief funds totaling over \$400,000 to 34 nonprofit organizations.



Tim Burriss
Finance Officer

Finance Committee

- | | |
|--------------------------|----------------------------|
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Scholarship Funds

As seniors at Stewartville High School prepare for their next steps in life, scholarships can help ease the financial burden on many families. Stewartville High School is one of many local high schools that host scholarship funds at Rochester Area Foundation that were established by generous donors. For over 20 years we have had a valued partnership with the Stewartville School District. Multiple scholarships are awarded based on varied criteria; some recognize academic achievement or volunteer service, while others are for specialized areas of study or are designated to support students who have overcome specific obstacles.

“The school district partnerships are extremely important to a successful scholarship program,” explains Carrie Moscho, Rochester Area Foundation’s Community Impact Officer. “The school staff have strong relationships with potential candidates and understand the focus of the individual scholarship opportunities; working together, we are able to promote, identify, and bring forward remarkable student applications.”

In 2021, RAF, our scholarship fundholders, and education partners awarded 48 scholarships totaling \$67,500. Scholarship funds provide hope and opportunity for students who desire to pursue higher education, or technical or specific training programs. The individuals and families who donate these funds have the knowledge that their financial investments are well-managed and that through the volunteer scholarship committee, candidates who best embody the spirit of the educational award are chosen.



“...working together, we are able to promote, identify, and bring forward remarkable student applications.”



Scholarship Endowments

Aseda Scholarship

Aviation Pathways Scholarship

Blenkush, Dilley, Tvedt, Tyce and
Olson Memorial Scholarship

Dorothy and J. Edwin Brin Scholarship

Walter and Pauline Castner
Scholarship

Amy Donahoe Memorial Scholarship

Ron and Marsha Durst Scholarship

Leona Engel Memorial Scholarship

Dr. A. O. Hagen—Helen Tews Hagen
Scholarship

Marjorie L. Seeba Holt Scholarship

John Marshall Class of 1964
Scholarship

Kasson-Mantorville Scholarship

Katharine Kilbourne Scholarship

Kristi L. Lambert Memorial
Scholarship

Rochester Better Chance Scholarship

Stewartville Merit-Based Scholarship

Sustainable Agriculture and Forestry
Scholarship

Tiger Scholarship

Wyatt M. Coy Memorial Scholarship



Carrie Moscho

Community Impact Officer

Scholarship Committee

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Peg Mattke

Mary Ehmke

Kristin Pearson

Patty Gerdes

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Jerry Williams

Shirley Lee

Pat Wimmer

Nate Lovik

Abdullahi Yusuf

Kris Loving

The Reading Center

Philanthropy can be put into action in the present to support the important work of area nonprofit agencies and nearly all nonprofit organizations rely on yearly financial support to promote their mission and vision.

A gift for the future benefit of a nonprofit agency, through an endowment fund, provides support in perpetuity for continuing the mission and vision of an organization. Endowment funds are the philanthropic vehicle that give our donors that option for permanent support of nonprofits and causes near and dear to them.

The Reading Center is honored to be the designee of two endowed funds that continue to provide annual unrestricted resources to further promote their positive impact for clients.

Since 1951, thousands of children and adults have benefited from The Reading Center's methodology to help students with dyslexia. The Orton-Gillingham Approach is a research-based,



multi-sensory, phonetic approach that is the hallmark of The Reading Center's team of specially trained tutors and is used throughout their programming.

Paula Rome, the founder of The Reading Center, made it her life's passion to teach children and adults with dyslexia to read, according to Cindy Russell, Executive Director. When Paula passed away in 2008, her family pooled the memorial funds and opened an endowment fund at Rochester Area Foundation in her memory. Cindy feels that it was fitting that Paula's children recognized her legacy as an advocate and teacher with this gift.

One way in which The Reading Center utilizes these annual distributions from the endowed funds is to support scholarships for students and training for tutors.

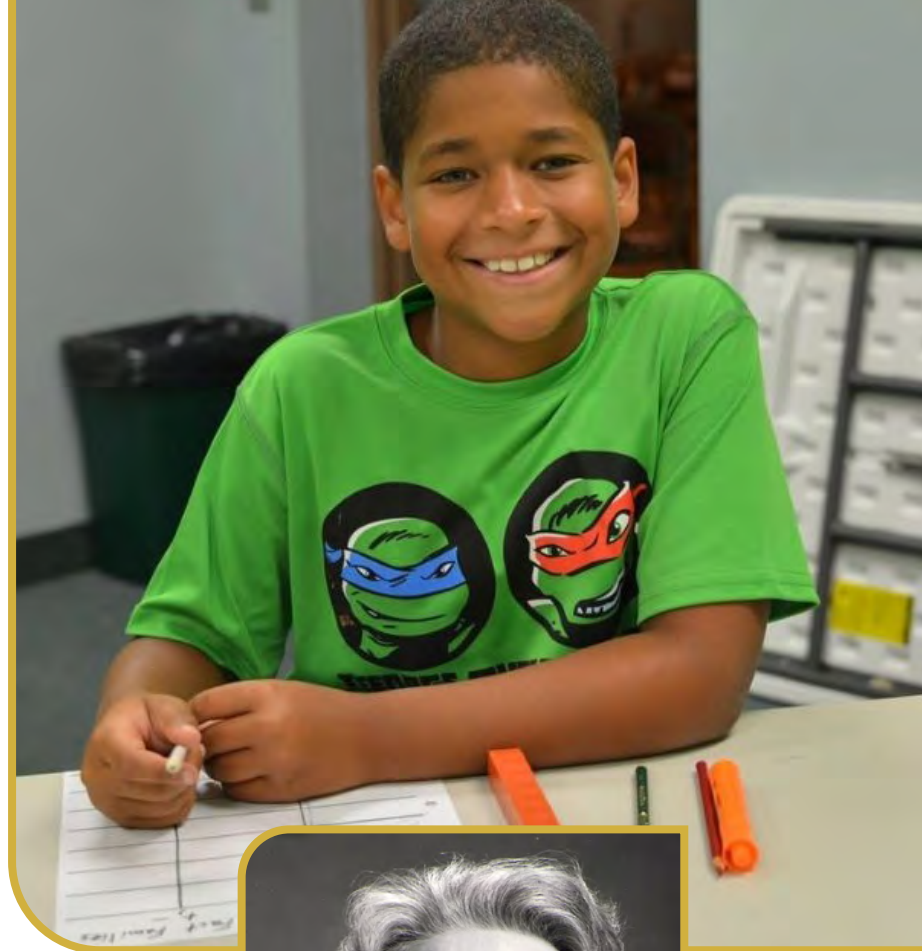
Most recently, when COVID had such a devastating effect on in-person learning in school, many families identified that their



children were struggling. During that time of studying at home, Chelsea's mom witnessed firsthand how her daughter was using workarounds to complete her school work, potentially hiding her level of need from her classroom teachers. Chelsea began tutoring at The Reading Center in 2021 and her gains in reading skills have already been noticed by teachers and supported by data. Chelsea loves working with her tutor, Ms. Melissa. She feels excited, supported, and encouraged by the skills she has learned. Her mom has also noted that Chelsea now has an understanding of dyslexia and is advocating for herself at school.

This example of positive impact and learning growth for Chelsea and her family is at the core of The Reading Center's work and what charitable giving supports. "Partnering with Rochester Area Foundation gives The Reading Center visibility with community-minded donors from the Rochester area who care about literacy. Such visibility is truly valuable," expressed Carl Anderson, Chair of The Reading Center Board of Directors.

Endowment funds are the philanthropic vehicle that give our donors that option for permanent support of nonprofits and causes near and dear to them.



Paula Rome
Reading Center Founder

Endowment Funds

Adapta

Aldrich Memorial Nursery School

The Arc Minnesota - SE Region

Bear Creek Services

Boys & Girls Club of Rochester Scholarship

Byron School District

Camp Olson YMCA

Chatfield Public School

Chatfield Public School - Geiger

Choral Arts Ensemble

Chosen Valley Community Foundation - Chatfield Lutheran Church

Chosen Valley Community Foundation

Civic League Day Nursery

Deana Anderson Memorial Scholarship

Dodge Center Foundation

Dorothy Day Hospitality House

Family Promise

Family Service Rochester - Van Laningham Development

Friends of Quarry Hill

Greater Lake City Community Foundation

Greater Rochester Advocates for Universities and Colleges Workforce Innovators

History Center of Olmsted County

James Perkins

LGR 2006 Miracle Field

Lourdes Development

Madonna Living Communities

NAMI Mental Health Matters

The Reading Center

RNeighbors Rochester Tree Fund

Rochester Art Center

Rochester Civic Music

Rochester Music Guild - Douglas

Rochester Music Guild - Dr. Howard and Peggy Andersen

Rochester Music Guild - Duffy

Rochester Music Guild - Georgia Daniel

Rochester Music Guild - Gloria Swanson Senior Winds

Rochester Music Guild - John Hamilton Edmonson Sr. Voice

Rochester Music Guild - Karsell Family Junior Winds

Rochester Music Guild - Spackman Family

Rochester Music Guild - Suddendorf

Rochester Music Guild

Rochester Public School Foundation - Geitzenauer

Rochester Public School Foundation - Joel E. Luhman Memorial

Rochester Public School Foundation - Michael Ladin Memorial

Rochester Public Schools Fund - Goodyear

Ronald McDonald House

Rotary Club of Rochester Foundation, Inc.

Seasons Hospice Endowment for Patient Care Fund

Southeastern Minnesota Youth Orchestras

St. Luke's Church

Stewartville Area Community Foundation

Synergy & Leadership Exchange

United Way of Olmsted County

Zumbro Valley Health Center

Zumbro Valley Medical Society Foundation

Heritage Society Members

The Heritage Society recognizes those individuals who have made gifts to Rochester Area Foundation at the time of their passing. Additionally, we honor those who have made their intentions known that charitable gifts to the Foundation are a part of their estate plans. We are honored work with community members to provide an opportunity to leave a philanthropic legacy.

Jeffrey G. Allman	Peter and Carol Carryer	Donald R. Hardy Probate Estate	Jon and Sue Losness	Bruce and Sara Qualey	Leslie and Crystal Thornton
Neil Anderson	James and Sue Clausen	Paul and Rebeca Harkess	Violet Lucius	Richard and JoAnne Rosener	Al and Sharon Tuntland
Lora Anderson	Portia Corbin	Linda Harwick Estate	Kenneth and Louella McGhie	Christine Sadowski	Dr. Gertrude M. Tyce
George and Lois Annis	Al and Ann DeBoer	Gary and Nancy Hayden	Dr. Wallace A. Merritt	Al and Julie Schafer	Mark and Julia Utz
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Mark T. Bucher	Dorothy and T. Emil Gauthier	Dag Knudsen and Deirdre Flesche	Virginia Payne Charitable Trust	James and Patricia Talen	Ronald and Dianne Yanish
Bernelda Busian	Marjorie Ginn	Lyle and Nancy Kuhlmann	Daisy B. Plummer	James and Joyce Talen	
Alan Calavano	Velva A. Gitsch	Dr. Donald and Phyllis Layton	Joe Powers	Steve and Nancy Thornton	
Jane K. Champion	Violet Glasby				
	Toni A. Hanson				
	Oscar and Ella Hanson				

A Legacy of Caring

At a very young age, Violet Glasby was placed in a residential and educational facility in Owatonna that was at the time named the Minnesota State Public School for Dependent and Neglected Children. For some children the school was a temporary home, until they were placed out into adoptive homes. The children who remained at the school lived under the emphasis of order, usefulness, discipline, obedience, and efficiency.

Violet lived the majority of her childhood at the state school, leaving when she turned 18 years old. Upon leaving the school, Violet moved to Rochester and found her true home. She first found employment as a housekeeper with the Mayo family. Eventually Violet also took a position at Methodist hospital in housekeeping, where she continued working until her retirement. During Violet's time at Mayo Clinic she was honored to receive a Karis Award which recognizes staff who live out Mayo Clinic values in an extraordinary way as they serve patients, visitors and colleagues.

As a young adult, Violet was blessed to meet a woman that became the mother figure she had missed growing up. Violet and Elizabeth, her "adopted" Mom, enjoyed traveling together for many years. Trips to Norway and Germany were among some of their favorite adventures.

Violet's close friend Kathy Lessard describes Violet as extremely generous and caring. Kathy notes that Violet was a woman of strong faith with a big heart. Violet's desire to give back and support both the meaningful people in her life and organizations she was passionate about was very important to her.

After a life well lived, Violet passed away last September. As a final testament to her generosity of spirit, Violet worked with her professional advisor and Rochester Area Foundation to leave a legacy that will continue to provide support in perpetuity to the community. Through her careful planning, Violet will continue to live on in those that she touched and the legacy that she created.



Violet Glasby

“Violet's desire to give back and support both the meaningful people in her life and organizations she was passionate about was very important to her.”

Planning for a **Future Legacy**

Beth remembers very vividly when she was a young girl and some neighborhood boys had frogs that they weren't treating well. She approached them and told them to stop. One of the boys told Beth that if she paid them 10 cents for each of the frogs, they would let them go. She ran into her mom immediately to ask for the money. This left two impressions on Beth at a very early age; her strong desire to protect animals and their wellbeing, and that if you have resources you need to use them to help others.

At that point Beth's activism was born. Throughout her life she has given of her time and treasure to volunteer with organizations that she was passionate about and has also donated financial resources to support operating costs.

After a family member passed and she worked through a challenging estate, Beth was exhausted. She conveys that that experience led her to "Do the heavy lifting of financial planning while I still had the strength and presence of mind."

"Estate and financial planning are a blend of soul searching with facts," articulates Beth. She began a search for local resources. She wanted to work with knowledgeable people who had specific expertise in the many facets of estate and financial planning.

This searching led Beth to form what she has coined her "girl team." Between her attorney, Judi Wilson from Wagner Oehler, her local wealth management team, and Ellen Hegge at Rochester Area Foundation, she feels that she has caring experts who can answer her questions, know how to listen, and have given options that match her values, all while allowing Beth to frame her own decisions. "It is important to incorporate personal values into estate plan objectives. Your estate plan attorney is there to help you meet your goals, while also minimizing expenses and taxes," reiterates Judi Wilson.

Beth has made arrangements to leave a gift of real estate to Rochester Area Foundation. This nontraditional asset gift will in turn allow RAF to open two scholarship funds for students, and two donor designated funds to support nonprofit organizations all in Beth's name. Each of these funds will go on in perpetuity, leaving a legacy and continuing to make philanthropy come alive.

Gifts of nontraditional assets are a thoughtful way to leave a legacy. Gifts of real estate, personal property, life insurance policies or retirement accounts are different kinds of assets that when included as bequests to a nonprofit organization can be very efficient. These types of bequest gifts can also avoid tax consequences as opposed to leaving these assets to family or friends. Judi Wilson confirms, "The giving options at Rochester Area Foundation are diverse. You can maximize your charitable impact with thoughtful charitable gifts that make a difference, while also minimizing taxes. Your goals and values may be honored through lifetime gifts or legacy planning. The staff at RAF are very responsive and take time to tailor a giving plan that meets the needs of the client."

Beth recalls a visual prompt that helped her in her planning journey. She encourages you to imagine that you are the loving caregiver of your 90-year-old self. Think about what steps you can take now to ensure quality of life and peace of mind for you. Beth reminds us that these steps will take time, patience and hard work, but will lead to setting up a plan that will honor and protect that older version of you.

Bringing out the best in our community.

Our thanks for the work you do.

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We are proud to recognize these philanthropic partners throughout our report.

First Homes

Tadesse Negash and his wife Yewelsew Demisse moved to Rochester with their infant daughter Ruth four years ago. Not able to find a home they could afford to purchase when they arrived, the family lived in a small apartment for three years.

Tadesse happened to find a home for sale through First Homes and reached out to First Homes Program Officer, Shirley Lee. The home they were interested in was already under contract, but they worked with Shirley to learn about the affordable housing program and become preapproved for a mortgage so they were ready when another home was available that matched what they were looking for. All homes under the First Homes program are part of a Community Land Trust (CLT). Community Land Trusts give more families the opportunity to own their own home by providing a subsidy investment into the home. This allows individuals and families to build wealth that can be passed on to future generations.

When Tadesse and Yewelsew found out that they were expecting a new baby they had a strong desire to find a larger place to live that would allow for enough space for their growing family. They were thrilled to learn from Shirley that there were new townhomes under construction in the Villas of Valley Side that perfectly fit their needs. The two bedroom, two bathroom townhome was the answer to the Negash Demisse family's fervent wishes that they could find a safe and affordable home for their family.

Six months after moving into their home, the family welcomed daughter Yuhana. Tadesse works at Mayo Clinic as a Cardiac Heart Monitor Technician. Yewelsew stays home with their two daughters. The family is grateful for the support from First Homes and guidance



“ Thanks to First Homes, Tadesse and his family were able to purchase a fantastic first home through the program...”



in receiving gap loan assistance, and is thrilled that they have a mortgage with a payment they can afford. "Through the process of buying a home, we are privileged to meet, educate, and develop relationships with wonderful new clients such as Tadesse. Thanks to First Homes, Tadesse and his family were able to purchase a fantastic first home through the program and obtain the benefits of a great loan program that fit their family's needs perfectly. It was a pleasure working with Tadesse to help him achieve his dream and create a strong client relationship at the same time," exclaims Kim Novotny, Mortgage Lender at Home Federal Bank.

The family loves their quiet neighborhood and enjoys spending time in the community they have found with their neighbors.

Daughter Ruth celebrated her fourth birthday with a party at their new home, and from her brilliant smile, we can tell she loves her new home. Tadesse remarked, "We really enjoy owning our home and not living in an apartment anymore. We were able to have a birthday party for our daughter and that was not possible at the apartment where we lived before."

The success of First Homes in assisting homeowners like Tadesse and Yewelsew is often a team approach. Kim Novotny expressed, "As a mortgage loan officer serving Rochester and the surrounding communities, I'm excited that Home Federal is able to partner with First Homes to provide affordable housing to first-time home buyers. The First Homes program is a valuable asset to this community, offering homes at lower prices which in turn allows us as lenders to help our first-time mortgage clients achieve their dream of home ownership sooner than they thought possible."



Shirley Lee

First Homes
Program Officer



Emily Neville

First Homes
Program Assistant



First Homes was organized in 1999 and is guided by the mission to provide leadership in the creation of a permanent supply of quality workforce housing throughout the greater Rochester area. This has largely been achieved through the growth of our Community Land Trust. These efforts are supported generously by community partners, those who understand the need and importance of collaborative work.

In 2021, First Homes added an additional six homes to the Community Land Trust. We were honored to receive Community Development Block Grant funding from the City of Rochester, and add four additional homes through this funding award. Additionally, we partnered with Cannon Falls Housing Initiative, accepting the fifth home into the program through this collaborative effort with Cannon Falls, Goodhue County, and the Cannon Falls School District Industrial Arts program. To date, First Homes has 230 properties in the Community Land Trust.

First Homes has served our community:

- 🏠 **25%** of homebuyers are families of color
- 🏠 **28%** of homebuyers are single parent families
- 🏠 **\$34,593** is the average income of homebuyers within the program
- 🏠 **645** adults and **309** children have been housed in a First Homes home

First Homes' homeowners fall at 51.5% of Area Median Income which confirms the need to continue protecting, maintaining, and creating affordable housing solutions in our region.



In 2021

First Homes added an additional six homes to the Community Land Trust



First Homes Community Impact

Affordable Homes and Rental Units
Located in 12 Communities



Afton Zelinski
First Homes Director of
Community Land Trust



Justin Voss
First Homes Director of Projects

First Homes Board of Directors

- | | | |
|----------------------|----------------|---------------|
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| Jamie LeDent | Steve Spohn | Kim Woodruff |

David and Ginger **Holmes**

"Giving has been described in many ways; the concept of agape is one of the strongest," expresses David Holmes. Agape is described in the New Testament as the fatherly love of God for humans. This is often extended to the love of one's fellow humans.

David remembers growing up in Chicago, and the times he witnessed his father putting into to practice agape and giving to others who weren't so fortunate. Sharing of his time to play Santa in the neighborhood, distributing small gifts and spreading cheer, or paying for a meal for someone. This made a lasting impression on David.

Another seminal moment for David is when he recalled a particular instance when he had the occasion to give of himself and he didn't seize that opportunity to give to someone in need. He recollects that missed opportunity as "leaving me with great sadness and great regret that I had not helped another in time of need." This was a turning point in David's philanthropic journey.

Both David and Ginger have practiced agape within our community through their many gifts of time, talent, treasure, and introduction. Ginger has worked tirelessly giving her gifts of time and talent to multiple nonprofit organizations. Ginger observes that the various roles that she has held in the nonprofit sector have fallen into two different veins. Some have been positions where she has participated indirectly, by serving on various committees or within a Board of Directors. Other positions have been where she has had impact with a hands-on role assisting agencies in performing direct service to clients.



David and Ginger Holmes

“ *The nonprofit community in Rochester is vital to the mission of Rochester...* ”

Ginger views each of these roles being of equal importance, one setting the mission and vision of an organization and the other working to carry out that mission and vision. "The nonprofit community in Rochester is vital to the mission of Rochester, which is to strive to enhance community pride by improving the physical, environmental, economic, cultural, and social quality of the community. The City cannot do this alone and the nonprofit community is here to help," eloquently states Ginger.

One of the other ways in which both David and Ginger provide support and care to our community is by hosting a Donor Advised Fund with Rochester Area Foundation. They first learned about this option during a presentation about philanthropy. At the time, they decided it was a good option that allowed them to support organizations which aligned with their family's goals and values.

A Donor Advised Fund allows an individual or family to make a tax-deductible contribution of appreciated stock, real estate, personal property, or cash when the timing is right for the family or individual. The fundholder can then take the time they need to put philanthropy into action by recommending grants to nonprofit organizations that support their favorite causes and meet their charitable goals.

With more than 77 years of leadership the Foundation carefully manages funds, can advise fundholders of unmet and emerging needs in our community and helps families achieve philanthropic goals.

Ginger states, "Nonprofit organizations cannot help without the support of our donors. Our donors are the backbone of our organizations, which is the backbone of Rochester Area Foundation and the Rochester community."

Both David and Ginger have the same sentiment when it comes to their personal agape, "helping others with time, talent and resources remains not only an enormous opportunity but a blessing."



Ellen Hegge
Philanthropy Officer

Development Committee

- Rita Hawkins
- Ginger Holmes
- LJ Johnson
- Kathy Lombardo
- Thom Nustad
- Karel Weigel, Chair
- Judi Wilson

Donor Advised Funds

Adamson Motors	Dennis Busche	Dodge Center Foundation	David B. and Barbara Frogner	David and Della Jenkins
William and Caroline Adamson	Byron School District Impact	Dodge Center Foundation - Jessica Marie Arnold	Julie and Jim Galkowski	Janet and Larry Johnson
Ahlquist Family	Cain Family	Dodge Center Foundation - Triton Foundation	T. Emil and Dorothy Gauthier	Jeffrey E. Johnson
Patricia M. and Colin G. Aldis	Dr. Martin and Mary Campion	Dodge Center Foundation - Veteran's Memorial	Halcon Furniture	Leigh J. and Judy Johnson
Craig and Linda Allen	Chosen Valley Community Foundation	Michael and Nancy Domaille	Chuck Handlon Century Scholarship	Patricia Judd
George L. and Dorothy H. Allen	Ed and Mary Clark	Joel and Sandra Dunnette	Ashley Marie Hanson Memorial	Neal and Cynthia Karels
Amadio Family Fund for the Arts	James D. Clausen	Ron and Marsha Durst	Hartzell Family	Karsell Family
Neil P. Anderson	Dr. Judith and Judge Lawrence Collins	Terri and Brooks Edwards	Gary and Nancy Hayden Family Foundation	Dan and Mary Jo Kelly
Arc Southeastern Minnesota	Curley Family	Rachel Ehmke Memorial Foundation	George and Carolyn Heyne	Kelzer Family
Sarah J. Armstrong	Dauntless	Eudaimonia	Hindermann Family	Cheryl McGrath Key
Mark and Lucy Bahn	Davidson Family	Richard and Ingeborg Emslander	Roy L. Hoffman	John and Dottie Klopp
Andrea J. Beck	Dan Davidson	Family Service Rochester	David and Virginia Holmes	KMTelecom
Lynn Behnke	Daphna Davidson	Ron and Linda Fess	Holy Anargyroi Greek Orthodox Church	Janet and Joe Knobbe Family Memorial
Cathy Belhumer Memorial	Sidney and Iris Davidson	Cristine Fischer	Home Federal Savings Bank	Allen and Anne Koenig
Allison and Aaron Benike	Tal Davidson	Timothy Fischer	Scott Hosier Memorial	M.P. Krieger
John and Cindy Benike	Donald and Barbara De Cramer	Patricia and William Fitzgerald	Tom Hosier Memorial	Lyle and Nancy Kuhlmann
Jim Bier and Rita Till	Al and Ann DeBoer	Barbara A. Flasch	Ironwood Springs Legacy	John Kyle
Art and Maryann Birdseye	Marlene Delfs		Dave and Jan Jaspersen Family	Law Enforcement Memorial Foundation of Southeast Minnesota
Jane Brandhagen	Patrick and Teri Deutsch			
Richard and Nancy Brubaker				

Lasker Jewelers Community	Richard Orvold and Marita Heller	Ryan Windows & Siding, Inc.	Randall Stone and Kim Norton	Veterans and Emergency Services Museum of Rochester, MN
Greg and Donna Layton	Palmer Family	Forrest and Faye Sargent	P & K Streit Gratitude	Janet Notheis Volkmar
Locke Family	Penz Family	Lisa J. Schlesinger	Mary and Fred Suhler	Louis and Linda Wagner
Kathryn and Phillip Lombardo	Merle Peterson	Robert Schoenfelder	Superior Mechanical	David and Julie Warner
Sue and Doug Luebbe	Lucille R. Phillips	Victor Scott Trust	Don and Stephanie Supalla	Natalie Thornton Webb Memorial
Ross and Peg Mattke	Irvin P. and Maureen Plitzuweit	Seasons Hospice	James and Joyce Talen	Karel Weigel
Mayo Clinic	Post Family	Ronald and Theresa Seeger	James and Patricia Talen	Weis Family
McGuire Family	Joe Powers	Dennis and Rita Semerad	Mark and Sheryl Tasler	Wells Fargo Bank
Eric McNamara Live Love Laugh Foundation	Donald and Barbara Prow	Wendy and Larry Shannon	Thompson/Kirkland	Charles and Barbara Withers
Thomas and Patricia Miller	Purrington Family	Patrick and Karen Sheedy	George Thompson Community Advisory	Ron and Judy Yaggy
VM Miller Family	The Rea Family	James and Jeanne Sheehan	Wayne L. Trahms	Yanish Family
Mindset Foundation	Rochester Music Guild	Soldiers Field Veterans' Memorial	Alan O. and Sharon Tuntland	Fred and Roxanne Ziecina
Audrey M. Nelson M.D.	Rochester Public Library Foundation	Slightam Family Foundation	Urban Oasis	Zubay Family
Beverly Nelson Arts Education	Rochester Rotary Club	Jim and Judy Sloan	Mark and Julia Utz	
Beth Marie Nienow	Jill and Chris Rock	Hugh and Aynsley Smith	Sharon Van De North and Lee Knight	
Nuss Family/Nuss Truck & Equipment	Dick and Joanne Rosener	Sperling Family Foundation	Rich and Marian Van Dellen	
William and Heidi Oehler	RT Autism Awareness Foundation	David and Sara Stenhaug	Paul and Lucille Vermeersch	
Oeth Family		Stewartville Community Foundation		

Coalition for Rochester Area Housing

Revenue

Coalition for Rochester Area Housing \$353,463

Total \$353,463

Expense

Coalition for Rochester Area Housing \$823,901

Total \$823,901

Founded in 2017, the Coalition for Rochester Area Housing is a collaboration of public and private sector organizations, with funding investment from Mayo Clinic, Olmsted County, the City of Rochester, Destination Medical Center and Rochester Area Foundation. The Coalition is a funders collaborative, comprised of thought leaders who seek to address and improve the affordable housing gap in Rochester and area communities.





5 Housing Priorities

In 2021, the Coalition utilized extensive data from a comprehensive needs analysis to develop five housing priorities for Olmsted County which provides a guide for review of future project investments and initiatives.

- ✓ Create new homeownership opportunities
- ✓ Increase homeownership for community members who are Black, Indigenous, or People of Color (BIPOC)
- ✓ Increase housing options for those earning less than 50% of Area Median Income (AMI)
- ✓ Preserve existing affordable homeownership and rental housing options
- ✓ Create additional senior housing options at all income levels



Mayowood Apartments

One of the Coalitions' early investments came to fruition in 2021. Mayowood Apartments construction was completed, making 30 units of supportive affordable housing available to members of our community who experience severe and persistent mental illness. Not only will residents have a safe, affordable place to call home, they will receive wraparound services to support a variety of needs, moving them towards stability and becoming engaged, contributing members of our community. The Coalition awarded Center City Housing a \$210,000 deferred loan to support this important community housing solution. According to Dave Dunn, current Co-Interim Executive Director of the Coalition for Rochester Area Housing, "This investment from the Coalition turned this project into a reality, providing a unique housing opportunity to a vulnerable population."



Coalition Community Investment

Enacted in 2021, the American Rescue Plan Act activated federal funding to the Southeast Minnesota region. Using funds received through the American Rescue Plan Act, Olmsted County committed \$10M to a five-year investment in affordable housing to create and preserve more than 1,100 affordable housing units in Olmsted County and leverage investment of more than \$200M. As an original Coalition member and funding partner, Mayo Clinic also committed to providing \$5M in support of affordable housing solutions.

Jennifer Woodford, President Rochester Area Foundation, asserts, "Rochester Area Foundation and the Coalition for Rochester Area Housing will continue our commitment to housing solutions in our community by focusing on funding projects and investment opportunities that return funds back into the market efficiently and favoring opportunities for risk-distribution and equity-investment partnerships with for-profit developers."

With its new multi-year plan and \$15 million commitment, the Coalition for Rochester Area Housing is providing more bold solutions for bridging our communities' affordable housing gap. By stabilizing the path to home ownership, ensuring the availability of affordable rental housing, and investing in innovative housing initiatives, the Coalition will help ensure that the people so essential to our communities' growth and success can also proudly call our communities "home."

Coalition Partners:



Rochester Area Foundation

“ *A gift of time, talent or treasure is much appreciated as both of these organizations rely on volunteers to keep the vision and mission alive. Consider a gift to honor these men and women.* ”

Memorial Funds

The Rochester area is rich in history. There are stories among stories within our community. Rochester Area Foundation is proud to partner with volunteer organizations who are working diligently to preserve our area history and offer a place to memorialize members of our community.

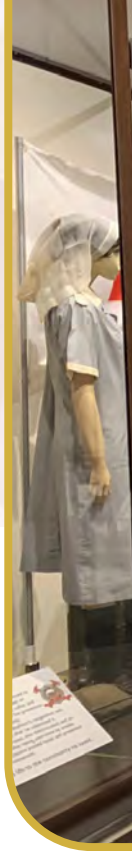
Two of these nonprofit partner organizations are the Law Enforcement Memorial of Southeast Minnesota and the Veterans and Emergency Services Museum (VESM).

The Law Enforcement Memorial Foundation of Southeast Minnesota was formed to honor the fallen officers of Southeastern Minnesota, encompassing 13 counties. Olmsted County Sheriff, Kevin Torgerson, feels that “For the vast majority of our public they have never had a place to come and say thank you to these everyday heroes. Now they will. And for others it will be a place to learn of some amazing stories and how historically these officers, troopers, deputies, agents, and one soldier helped shape our communities and public safety in Southeastern Minnesota.”

The mission of VESM is to provide visitors with a family-oriented and engaging experience that instills an appreciation for and awareness of those who preserve our freedoms and protect our safety. The goal of the Veterans and Emergency Services Museum is to honor those who keep us safe, both at home and abroad. This includes military service personnel, both active and retired, and those working in the areas of fire protection and law enforcement, and emergency medical responders.

VESM currently has a small space in downtown Rochester. The displays tell the history and stories of all branches of military and emergency services, with the hope to educate, inform and entertain visitors. According to VESM Board Member Dick Krom, “We appreciate partnering with Rochester Area Foundation because we have a common goal in that we are focused on making Rochester a giving and sharing community.”

Philanthropy comes alive in support of these organizations and their strong desire to help us all remember those who have served and the events that have shaped our country, region and community. Sheriff Torgerson puts it best, “Community support to the survivor families, partners and friends is just tremendous. Their greatest fear is their officer will be forgotten. Community





support has also meant more to the current serving officers over the last few tumultuous years and for their families. Showing appreciation to anyone in public service is so important. There is a saying we have used while envisioning this project that says, they believed in their communities, even if it meant sacrificing everything. So for our communities to return that love and trust goes beyond words as to how much that means to our officers and their families.”

A gift of time, talent or treasure is much appreciated as both of these organizations rely on volunteers to keep the vision and mission alive. Consider a gift to honor these men and women.

Each of these nonprofit organizations have partnered with Rochester

Area Foundation, hosting charitable donor advised funds. Creating a relationship with RAF means that these volunteer boards of directors receive administrative support through the Foundation. Donations are tax-deductible when given through RAF, and our staff completes the transaction including sending appropriate letters of thanks and tax documentation for deductions. Donations to these organizations are able to grow within our investment portfolio. Having their funds held in a donor advised fund means that each group is able to request funds back to the organization when needed to move their respective projects forward.

Community Impact Where Philanthropy Comes Alive

In 2021 through two cycles of competitive grant making, Rochester Area Foundation was honored to award grant funding to 34 area nonprofit organizations totaling over \$208,000.

Historically, the level of interest and amount of funding requested far outweighs the available funding. It is with the dedication and hard work of the Foundation staff team and the volunteer Grant Distribution Committee that these funding decisions are made. Each application is carefully vetted and considered amongst the pool of all applications. The Committee weighs the merits and potential impact in the greater Rochester community. We are committed to supporting the important work of all of the area nonprofits who are serving our community to allow each member to access the services they most need.

In January of 2021, the Foundation partnered with Olmsted County to administer a COVID-19 relief grant program. This was the third round of grants offered through this partnership. At the completion of the process, 34 nonprofit agencies were awarded over \$540,000. In 2020 and 2021, a total of approximately \$2.62 million was offered in grant funding throughout the pandemic to aid and support vital nonprofit services.



Field of Interest Endowment Funds

- Affiliated Credit Services Consumer Counseling and Education Fund
- George and Lois Annis Fund
- Be the Bridge Youth Development Fund
- Barbara Brown Fund
- Marilyn Haglund Fund
- Dr. Virginia Hartridge Fund
- Jenny Mo Fund
- Shirley A. Nelsen Memorial Fund
- Steve Thornton Nonprofit Capacity Building Fund

Grant Distribution Committee

- | | |
|-----------------|------------------------|
| Tracy Austin | Jade Sadosty |
| Tony Benson | Jim Sloan |
| Jane Champion | Dean Stenehjem |
| Rich Decker | David Stenhaug |
| Allie Good | Don Supalla,
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| Donna Greason | Sharon Van De
North |
| David Herder | Karel Weigel |
| Ginger Holmes | |
| Kay Karsell | |
| Jean Locke | |
| Rosebud Roberts | |

Community Engagement

With the national, state, and local events that have transpired within recent years, our local community and the Rochester Area Foundation looked inward to determine how we could best move forward with a focus on being inclusive and engaging a broader, more diverse audience in our work.

This focus began with signing on to support the Commitment to Racial Justice that was crafted by the Rochester Nonprofit Consortium. This commitment encourages Rochester Area Foundation to listen, learn, and act to address racism; connect to resources to apply a race equity lens to our work; and build capacity to promote wellbeing for all residents of our community. We are currently in the listen and learn phases of this important work.

Also in 2021, our Board of Trustees established a Diversity, Equity, and Inclusion (DEI) committee to explore ways in which our Foundation could expand reach, opportunity, and engagement within our area. The Committee convened a community conversation in November with DEI practitioners so that they could listen and learn from attendees to best determine how to support this important community work.

We also invested financially in supporting broader communication efforts as a partner with Rochester Post Bulletin and the Rochester In Color section. This focused initiative provides a platform to highlight diversity in our community and columnists of color. Stories shared are to feature members of our community who are making a positive impact and opportunities that we have together to make a change.

Additionally, part of the funds invested through Rochester In Color provided financial support to partially fund a position with Community Engagement Response Team (CERT) that works hand-in-hand with Rochester Police Department to de-escalate potentially volatile situations. This “boots on the ground” initiative worked with a group of dedicated volunteers in Downtown Rochester during the summer months.

Finally, RAF supported the Commitment to Action towards Racial Justice Micro-Grants that were financially administered by the Nonprofit Consortium. These competitive grants were awarded to support organizations in taking concrete action to advance their goals related to racial justice, equity, and inclusion.

Our Foundation seeks to increase our understanding of ways we can create greater impact by engaging our partners and collaborating to lift up community issues and opportunities.

Geographic Affiliate Foundations

Rochester Area Foundation partners with four regional community foundations to support local philanthropy investments and provide resources for success. This model allow for those local community foundations to invest in impactful projects and initiatives within their communities, while benefiting from Rochester Area Foundation’s resources, investment management and expertise.

One of our partners, Greater Lake City Community Foundation supported positive community impact by awarding \$8,500 in scholarships to students and \$23,650 in community impact grants. In addition to putting philanthropy into action through these granting practices, the Foundation had a very successful fundraising event, raising over \$40,000 for the local food bank.

We are honored to have strong partnerships with area communities who are building better communities for all in their regions of Southeast Minnesota.

In 2021, our affiliate partners held over \$925,000 in assets with Rochester Area Foundation for future investments into their communities, creating positive impact.



Stewartville Area Community Foundation



Nonprofit **Incubator**

Rochester Area Foundation's Nonprofit Incubator was designed to provide collaborative work space for up to twelve nonprofits. The Incubator serves nonprofit clients at all different stages of their nonprofit journey who represent a diverse group of interests, passions, and impact areas. The seven nonprofits who shared the nonprofit Incubator in 2021 ranged from members of the regional medical community representing physicians, nurse practitioners, and specialized patient support groups, to environmental water quality advocates and educators, to coordinators for service-oriented international mission trips, and culturally specific organizations focused on directly serving members of our BIPOC communities.

Culturally specific organizations are vital to our community because they fill important gaps for underrepresented communities. The cultural affinity and shared understanding these groups have with the communities they serve allows them to effectively engage with those communities to address the greatest areas of need. Furthermore, these groups are uniquely positioned to understand the specific challenges and barriers that these communities can face when accessing services

and navigating mainstream institutions. One of the exciting partnerships Rochester Area Foundation was pleased to join in 2021 is the Culturally Powered Communities Program sponsored by Mayo Clinic and United Way. As part of RAF's support of this equity initiative, four Incubator work spaces were made available to culturally specific organizations within the program to support their continued impact within the communities they serve.

Rochester Area Foundation's Nonprofit Incubator seeks to be a welcoming, supportive, and inclusive space that invites nonprofits of diverse size, background, and scope to feel a sense of belonging within the nonprofit sector. Whether a nonprofit is just getting their vision off the ground or an agency needs an affordable and flexible work space to be able to mobilize volunteers, the Nonprofit Incubator is waiting to support our nonprofit community members and fulfill the Foundation's vision of building, "Better Communities for ALL!"



Incubator Nonprofit Clients

Association of Southeast
Minnesota Nurse
Practitioners (ASMNP)

Bold Hope

Ethiopian Community of
Rochester, MN

Intermix Project

Minnesota Well Owners
Association (MNWOO)

Red Drop Resources

Zumbro Valley Medical
Society

RAF Properties Board

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Dave Oeth
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Craig Wendland

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Amanda Pelley
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Mechelle Severson
George Thompson
Jennifer Woodford
Nicholas Wysocki

Building & Grounds Committee

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



Amanda Pelley

Administrative
Service Manager

Community Impact where

Philanthropy Comes Alive!

Each and every philanthropic investment made through the Rochester Area Foundation creates positive change within our community. The charitable spirit that resides amongst our Fundholders and partners embodies the 77 year legacy that has been created and sustained through our Foundation.

Ultimately, philanthropy comes most alive in the people and places it touches. Lives are enriched, passions are ignited, and community is created. The ripple effects of the decision to engage in philanthropy not

only impacts our world in the immediate present, but also echoes into the future, beyond even our own lifetimes. Please enjoy a small glimpse into the impact YOUR philanthropic dollars have made in the lives of our community members on page 34, which highlights several of our 2021 Better Communities Fund grant recipients.

We invite you to consider how YOU can personally put philanthropy into action and make it come alive for years to come. Become an advocate for change, volunteer your skills, and introduce your family and friends to the idea of charitable giving. All of these combined efforts will continue to build better communities for all and create lasting legacies we can all feel proud to be a part of!



We've invested 2 million in 2021

One of the primary ways Rochester Area Foundation puts philanthropy into action for our communities is through grant making to nonprofits.

Family Promise Rochester

The goal and vision of Family Promise Rochester is to see an end to family homelessness, especially in our own communities. They seek to create internal efficiencies; advocate for the right mix of housing options in the community that are affordable and attainable; and continue partnering with other agencies who can provide additional supports to the families they serve. Grant award funding supported families entering the program with basic necessities.



Hope Ranch Foundation

Hope Ranch Foundation received funding for a space enhancement for their Equine-Assisted Psychotherapy Program. Equine Assisted Psychotherapy, is a treatment modality where humans and horses partner together for optimal client outcomes.



Revolutionary Earth

Revolutionary Earth strives to restore an ecosystem one backyard at a time by transforming lawns into large-scale gardens and pollinator habitats. These gardens provide at least 18 weeks of fresh, hyperlocal, organic produce for food-insecure families in Rochester for free. Funding from RAF, supported efficiencies in food distribution and providing much needed outdoor temporary shelter spaces for volunteers.



Ronald McDonald House Meals

Rochester Area Foundation funding supported the House Dinner Hero program. Ronald McDonald House provides meals seven days a week to families staying at the House through partnerships with local restaurants and private donations. Daily meal support allows families breathing room to focus on care of their child and takes away one financial burden.



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