



Building

Better Communities

... for all



Rochester Area
Foundation

2022
**ANNUAL
REPORT**

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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2022 Grants

by Impact Area

1,056 Grants: \$4,060,810 Invested



Youth & Family
75 grants
\$160,810



Health & Human Services
432 grants
\$1,178,194



Arts
46 grants
\$44,675



Environmental & Animal Welfare
45 grants
\$102,330



Education
210 grants
\$567,392



Housing
25 grants
\$693,856



Community Development
90 grants
\$871,943



Religious
88 grants
\$305,719



Disability Services
32 grants
\$62,084



Culture & Diversity
13 grants
\$73,921



Rochester Area Foundation

A Message

from RAF Leadership

Rochester Area Foundation is guided by our vision to build better communities for all. The work we do and people and programs we invest in are all directed by this statement. Throughout our 2022 Annual Report, you will witness our vision of building better communities coming to life. This is the work of many, and our success is due to great partnerships and community collaborations.

Putting philanthropy into action begins with you. When you join us and invest your time, talent, and treasures into our community foundation, you contribute to a wide depth and breadth of impact and our community receives amazing benefits.

Partners benefit from our understanding of area nonprofit organizations. We interact regularly with area nonprofits through education and grantmaking, providing us with extensive knowledge of where the most impactful work is being accomplished in our communities.

We convene thought leaders for the benefit of our community and our donors. RAF acts as a convener to discuss opportunities around crucial community issues.

We believe in a collaborative approach. When we collaborate within our community, we achieve more positive outcomes and cultivate meaningful relationships for future benefits.

We offer stability and permanence. Rochester Area Foundation is proud of our 78-year history of charitable support in the community, which will continue far into the future.

Thank you for your partnership in our vision to build better communities for all!



Jennifer Woodford
President, Rochester Area Foundation



Kathy Lombardo
2022 Board of Trustees Chair,
Rochester Area Foundation

Nonprofit Organizations

Salt & Light Partners

“Law Enforcement officers are called to respond to a wide variety of calls for service including critical incidents, people in crisis, traffic accidents, and death scenes. Additionally, within their service, officers are also called to provide counsel and comfort for people in need, often at the most unnerving time in people’s lives. This is an incredibly daunting task that takes its toll, creating both acute and chronic stressors on our law enforcement public servants,” states Rochester Police Department Chief Jim Franklin.

Who serves those who serve?

A relatively new nonprofit organization, Salt & Light Partners, is working to fill that need, with trained chaplains providing care and counsel to local law enforcement officers, first responders, and caregivers. Founded in 2021, Salt & Light Partners mission is to “serve those who serve.” Executive Director, Chaplain, and Founder, George Beech explains, “Salt & Light Partners chaplains bring a sense of calm to the emergency scene, and upon arrival they quickly assess who needs critical support in the midst of chaos. It could be the family who has just lost a loved one, or possibly the Deputy responding who happens to know the injured person involved.”

From its inception with one chaplain, Salt & Light Partners, with great leadership and support, has been able to increase its community service with the addition of 13 chaplains. Each has their own wealth of education and experience and a different faith background, supporting the Rochester Police Department, Rochester Fire Department, and Olmsted County Sheriff’s Office.



Salt & Light Partners chaplains bring a sense of calm to the emergency scene, and upon arrival they quickly assess who needs critical support in the midst of chaos...

As a faith-based organization, George believes that “Faith is why they do the service work they do, but it is not what they do,” meaning that chaplaincy is about caring for the whole person, heart and spirit, regardless of their background.

“The chaplain program is a game changer for our firefighters. Our firefighters see things that most people don’t and it is shortsighted to believe that caregivers don’t also need care. Having chaplains in the fire stations, building relationships and trust, over time, this will give our firefighters someone to turn to for advice, council, or help,” affirms Rochester Fire Department Chief Eric Kerska.



In 2022, Salt & Light Partners received a Rochester Area Foundation grant award that would assist in certifying three chaplains in Critical Incident Stress Management, providing psychological crisis intervention. This training opportunity strengthens the depth of knowledge for chaplains to broaden their service to our local law enforcement community. "Awarding financial support through a RAF grant, to a newer, more unique and specialized nonprofit organization like Salt & Light Partners allows them to build capacity and expand their reach," states Carrie Moscho, RAF Community Impact Officer.

Olmsted County Sheriff Kevin Torgerson agrees with his law enforcement leadership peers, "Salt & Light Partners are a new partner in the Sheriff's Office in 2022. They have assisted with difficult tasks like family death notifications, and proven to be great support for our deputies already. We look forward to a long and cooperative relationship."

Succinctly stated by one of the Salt & Light Partner chaplains, "The work is hard, but good."

Nonprofit Organizations

Living Room Tutors



At Rochester Area Foundation, we work closely with many of our area nonprofit organizations, providing resources, making connections, and at times, consultation. Through the fall competitive grant cycle, RAF was introduced to Living Room Tutors (LRT), and the staff was thoroughly impressed with the impact of this student-led nonprofit.

Living Room Tutors was founded in 2020, by Jinglin Li. At the time, Jinglin was a Junior at Mayo High School whose role at home changed during the pandemic. Her role as an older sister expanded to tutoring her younger siblings. When schools switched to distance learning, her parents were supporting her sister and brother with their schoolwork, but Jinglin found that it was easier for her to assist them as she understood the grade level work better. This led to the vision for LRT.

Jinglin wanted to mitigate the negative academic and socio-emotional repercussions of the pandemic by providing students with accessible tutoring services. According to Jinglin, "Tutoring is one of the most effective interventions to help students get back on track, and that is the mission behind LRT." Even as students returned to brick-and-mortar classrooms, LRT wanted to continue offering quality peer-tutoring services.

LRT pairs volunteer student tutors with students in need of tutoring. Once a tutor/tutee connection is made, pairs meet on a weekly basis over a virtual meeting platform. LRT offers all online tutoring services to K-12 students at no cost, which eliminates a huge barrier to families. "My daughter loved it! She got a great tutor that took the time to help her," explained one grateful parent whose child participated in the program.

To date, LRT has serviced over 800 tutors and tutees from across 24 U.S. states and 10 countries. Due to the breadth of student tutors representing multiple communities, tutoring is offered in over 14 languages.

This program sets itself apart from other academic support resources because it is run by an all-student leadership team. As students themselves, Jinglin feels LRT volunteers are able to better understand how other students can learn because they are keenly aware of the nuances and difficulties that are embedded in our modern-day education system. These insights help LRT design and improvise a tutoring program that is conducive to what it is like to be a student in 2023.

LRT's distinctive peer-to-peer model allows for greater relationship building that empowers both tutors and tutees and provides social and academic benefits. Tutees working with student-tutors are more comfortable asking questions and admitting when they don't understand material. And as they assist tutees, tutors not only develop a deeper understanding of the subjects they teach, but they also build planning, organization, time management, and communication skills. One LRT tutor shares, "I am so grateful to Living Room Tutors for giving me this opportunity to give back to our community - it has been such a wonderful experience."

Jinglin and her team of dedicated student leaders have big dreams to continue this work and meet the growing demand for academic support. As with many nonprofits, financial investments will allow them to grow their online platform to further support students and build capacity to expand.

“Tutoring is one of the most effective interventions to help students get back on track, and that is the mission behind LRT.”

“My daughter loved it! She got a great tutor that took the time to help her.”

“I am so grateful to Living Room Tutors for giving me this opportunity to give back to our community - it has been such a wonderful experience.”

Donor Designated Fund List

Steve Bakke Memorial Fund	Iwen Scouting
Kris Brown Memorial Fund	Bernice Krug
Bernelda Busian Endowment for Evergreen Cemetery	Elizabeth LaRoque Memorial
Cain Family	Mayowood Residence Collection
Alan Calavano History Center of Olmsted County Library	Midwest Melanoma Partership
Michael John Carryer Memorial Fund	Harold and Margaret Neece Fund
Christ United Methodist Church	Charles Nelsen Memorial Fund for the Dorothy Day Hospitality House
James L. and Janet Denny Endowment	James W. and Jean A. Newcomer
Dodge County Historical Society	Paula Rome Endowment for The Reading Center
Benedict M. and Eloise B. Dresbach	St. Olaf Heritage Association Fund
Pam Frangipane Memorial Fund for the Rochester Area Habitat for Humanity	Stewartville Area Historical Society
Rickee Henoeh Memorial Arts	Mark and Sheryl Tasler Excellence Fund
Alan E. Hiley Memorial Hockey Fund	Soldiers Field Veterans' Memorial Endowment

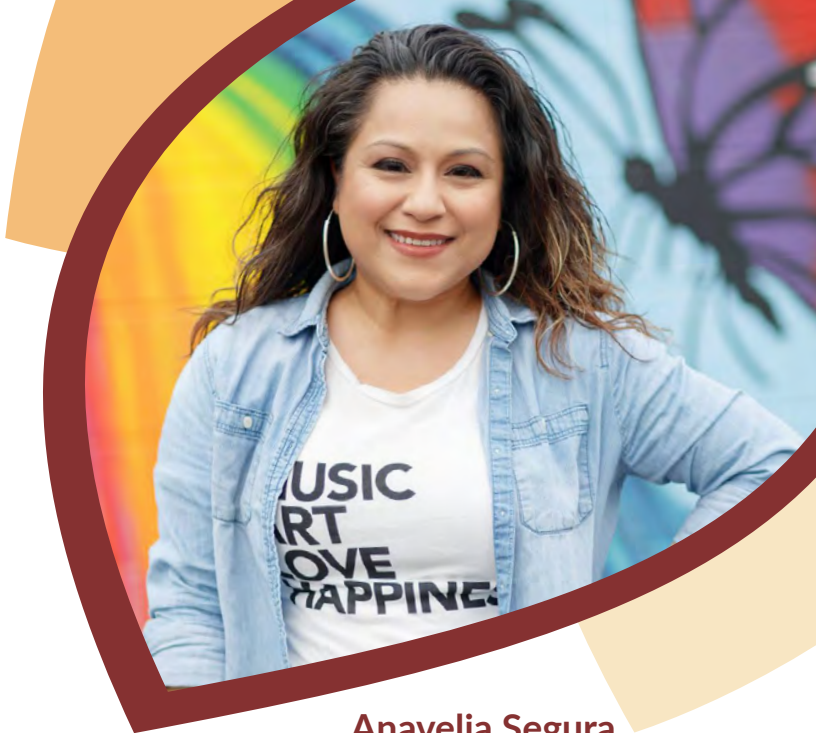
Nonprofit Organizations

The Intermix Project

Rochester Area Foundation is a supportive partner to Culturally Powered Communities (CPC), a local initiative to provide a support system and build equity within the nonprofit community focused on Culturally Specific Organizations (CSO). This overall support includes funding, mentoring, peer learning and professional development for organizations that serve and advocate for specific cultural communities.

“If you want change, you need to be part of the change,” says Anavelia Segura, founder of Intermix Project, a CSO dedicated to supporting positive outcomes for the Hispanic and other underserved communities. Anavelia is a woman who wears many hats. She is a mom to four, has a full-time career, leads her neighborhood association, and most importantly, she is a voice for so many in our collective community and her individual community.

During the height of the pandemic, Anavelia served as strong advocate, bringing the voices of her community forward. She worked tirelessly to support the needs of her community in the form of rent assistance, access to food, combating the lack of information, and easing fears of those around her. Anavelia confidently believes her advocacy caused others to re-evaluate how their organizations were serving our community and to better identify the unseen who desperately needed support. Conceived by Anavelia as a way to provide long-term support to her community in southeast Rochester, Intermix Project focuses on providing equitable education as well as economic and health advancements.



Anavelia Segura
Founder of Intermix Project

According to Anavelia, CPC came at a time in her advocacy when she was ready to advance her work. She viewed the opportunity as a way to formalize her outreach efforts, potentially receive funding support, and connect with a mentor. She is currently working to bring program opportunities to her community as well as building and sustaining a website so that people can find resources when they are in need and those who would like to support these efforts can learn more.

She is grateful for the support, guidance, and education she has received through CPC, but also observes that there is so much more to do, and many more people are needed to engage in this work.

The Intermix Project received grant funding in 2022 from RAF for Mi Dinero Flow, a financial literacy program designed to bring forth education from basic financial concepts to advanced understanding by breaking familial economic cycles and creating pathways to a financial legacy and health/nutrition education.



Ellen Brennan
Community Impact Associate

2022 Grant Distribution Committee

Tony Benson, Chair	Kim Keilholtz
Tracy Austin	Bonnie Schultz
Allie Good	Hugh Smith
Donna Greason	Dean Stenehjem
Dave Herder	Don Supalla
Ginger Holmes	Sharon Van De North

Field of Interest Funds

Dr. Virginia Hartridge	Marilyn Haglund
Affiliated Credit Services	Shirley A. Nelsen
Consumer Counseling & Education	Memorial
Bernice Krug	Barbara Brown
Jennie E. Mo	Support the Children
George & Lois Annis	Steve Thornton

“If you want change, you need to be part of the change.”

-Anavelia Segura

Nonprofit Endowments

- Adapta
- Aldrich Memorial Nursery School
- Arc Southeastern Minnesota
- Bear Creek Services
- Boys & Girls Club of Rochester Scholarship
- Byron School District
- Camp Olson YMCA
- Chatfield Public School
- 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 to work with community members to provide an opportunity to leave a philanthropic legacy.

Jeffrey G. Allman	James and Sue Clausen	Paul and Rebeca Harkess	Kenneth and Louella McGhie	Christine Sadowski	Mark and Julia Utz
Neil Anderson	Portia Corbin	Linda Harwick	Dr. Wallace A. Merritt	Al and Julie Schafer	Glenn and Ella Van Laningham
Lora Anderson	Al and Ann DeBoer	Gary and Nancy Hayden	Harold and Shirley Miller	Robert Schoenfelder	Amy L. Waugh
George and Lois Annis	Janet Denny	Wallace and Margaret Herrell	Thomas and Patricia Miller	Larry and Wendy Shannon	Karel M. Weigel
Dick and Judy Argue	Stephen Dow Mills	Marianne Hockema	Dr. Mary E. Mussey	Jim and Judy Sloan	Joseph and Darlene Weis
John and Lois Bakke	Benedict and Eloise Dresbach	Roy L. Hoffman	Dr. Audrey M. Nelson	Drs. Hugh and Aynsley Smith	Joyce M. Wenz
Robert and Olive Barnhart	Dr. Joseph and Lois Duffy	John and Rita Hunt	James and Jean Newcomer	Marguerite Smith	John and Nedra Wicks
William and Mary Ann Boyne	Dr. Richard and Ann Ferguson	Lois A. Jorstad	David and Gwen Oeth	William and Luella Stensrud	Jennifer and Eric Woodford
Margaret Briese	Barbara Flasch	Dan and Mary Jo Kelly	Richard Orvold and Marita Heller	Otto Sundvoll	Ronald and Dianne Yanish
Barbara L. Brown	Martha Frey	Emily J. Kennedy	Virginia Payne Charitable Trust	James and Patricia Talen	
Philip and Virginia Brown	Dorothy and T. Emil Gauthier	Dag Knudsen and Deirdre Flesche		James and Joyce Talen	
Mark T. Bucher	Marjorie Ginn	Lyle and Nancy Kuhlmann	Daisy B. Plummer	Steve and Nancy Thornton	
Bernelda Busian	Velva A. Gitsch		Joe Powers		
Alan Calavano	Viola Glasby	Dr. Donald and Phyllis Layton	Bruce and Sara Qualey	Leslie and Crystal Thornton	
Jane K. Campion	Toni A. Hanson	Jon and Sue Losness	Richard and JoAnne Rosener	Al and Sharon Tuntland	
Peter and Carol Carryer	Oscar and Ella Hanson	Violet Lucius		Dr. Gertrude M. Tyce	
	Donald R. Hardy				



Richard and Nancy Brubaker

Donor Advised Fund

Nancy grew up in Rochester, where she observed her mother volunteering her time to local nonprofit organizations. Her father was a Rotarian and a member of the local Club. Nancy recalls that both her parents were good role models who were generous with their time and gifts.

When Richard was eight years old, his father died unexpectedly of polio. His mother was left to raise three young children. She taught high school economics and sociology to support the family. At that time, female teachers earned half the salary of male teachers, so providing for three children on a meager income was a struggle. Richard and his older brother each had a paper route to help the family. Their wages, which they placed in a teapot in the kitchen, were used to pay for groceries. From his mother, Richard learned the importance of education and hard work.

After graduating from college, Nancy moved east, and it was in the Boston area that she met her future husband, Richard. Nancy and Richard moved to Rochester in 1970 when Richard was invited to join the staff of Mayo Clinic in the Ophthalmology Department.

Nancy was a stay-at-home mom, and while supporting their children, she also volunteered and served on the boards of many organizations over the years, including Aldrich Nursery School, the Women's Civic League, Rochester Music Guild, and American Association of University Women. Like her mother before her, she was fortunate to have time to volunteer and see firsthand the great needs in our community.

After their three children were grown and on their own, Richard and Nancy decided it was time to do something positive in the way of philanthropy. They were grateful for the lives they had enjoyed in Rochester and wished to show gratitude in some substantive way. They were slightly familiar with RAF, but after learning more at a meeting with RAF staff, they opened a Donor Advised Fund in 1999. They both felt it would be a convenient way for them to contribute to the community.

Nancy recalls that they began as modest donors to RAF, but they knew that small contributions would add up to significant amounts over time. Giving annually to their Donor Advised Fund

“Charitable giving considerations often involve a desire to give back to the community and giving assets meaning. We have seen how donor advised funds can be used as an impactful, yet flexible and simple way to facilitate such charitable gifts.”

— Eric Alleckson, Managing Director/Senior Advisor Choreo

allowed them to make donations to many nonprofits that they were passionate about, including Channel One, Salvation Army, United Way of Olmsted County, and their church. “It was our hope that over the years our giving would making a difference in the community,” expresses Nancy.

In 2000, Nancy was invited to join the Rochester Area Foundation Board of Trustees. She generously provided leadership oversight for nine years on the Board and also volunteered as Chair for the Grants Distribution Committee. During her years of service, she was informed about the enormous needs in our community and what a difference charitable donations and competitive grant awards make to nonprofit organizations. “These experiences opened my eyes to the many ways that the Rochester Area Foundation can make a difference in the lives of our citizens,” avers Nancy.

In 2018 Richard was diagnosed with pancreatic cancer. Richard and Nancy knew he had only a short while to live, so they had to make many decisions quickly. One discussion was about where memorial gifts should be sent after his death. Richard suggested the Rochester Area Foundation as he knew the gifts would be used most effectively there.

To this day, it gives Nancy pleasure to continue the tradition of the Brubaker Donor Advised Fund that she and Richard started over twenty years ago, having personally witnessed the tremendous growth of the Rochester Area Foundation and the impact it has made in Rochester and the surrounding community.



Ellen Hegge
Philanthropy Officer

Development Committee

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

Donor Advised Fund

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

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

Joyce L. Osborn

Scholarship

Education is the passport to the future, for tomorrow belongs to those who prepare for it today.

- Malcolm X

One can imagine that hundreds of students would pass through a teacher's classroom over the course of a 44-year teaching career. In those 44 years, students were mentored, tutored, counseled, and supported as they learned new concepts, transitioned from grade to grade, and balanced student life with home life.

Joyce Osborn left a legacy with all the students she impacted over her years as a teacher and administrator, and today her commitment to education continues with the legacy of an endowed scholarship fund at Rochester Area Foundation.

Born in the late 1800's, Joyce was fortunate to attend and graduate from Winona Normal School, Minnesota's first teacher-training school. The purpose of a normal school was to prepare a large cohort of teachers to effectively develop their students' ability to read, write and do basic math. In 1912, Joyce took her teacher's training to rural schools in Dodge County, Renville County, and Mower County.



In 1920, she found her place for the next 39 years within the Rochester School District, teaching and leading as an Administrator. Due to her strong commitment to students and education, Joyce established an endowed scholarship fund as a part of her trust. Each year through RAF, scholarships are awarded to area high school students who have demonstrated a desire to further their studies in math or a related field.

According to Judi Wilson, an attorney at Wagner Oehler, "Your estate plan can be created to meet your goals, embrace your personal values and include intentional charitable giving while also minimizing taxes and expenses."

Joyce was able to personalize her scholarship fund by defining the eligibility and the criteria for a volunteer committee to select a student that most embodies her vision.

"It's incredible that 36 years after her passing, we are honoring Joyce's legacy by awarding yearly scholarships in her name to local students," Ellen Brennan, RAF Community Impact Associate.

Joyce prepared with forethought and vision to leave a legacy based on her chosen career path which she made her life's work.



Carrie Moscho

Community Impact Officer

Scholarship Committee

Mary Ehmke, Chair	Wendy Shannon
Denise Kelly	Peter Somers
Manasseh Kambaki	Don Supalla
Beth Krehbiel	Therese White
Nate Lovik	Jerry Williams
Kristin Pearson	Abdullahi Yusuf

Scholarship Endowments

Aseda Scholarship	John Marshall Class of 1964 Scholarship
Aviation Pathways Scholarship	Kasson-Mantorville Scholarship
Blenkush, Dilley, Tvedt, Tyce and Olson Memorial Scholarship	Katharine Kilbourne Scholarship
Dorothy and J. Edwin Brin Scholarship	Kristi L. Lambert Memorial Scholarship
Walter and Pauline Castner Scholarship	Minnesota BetterLife Scholarship
Amy Donahoe Memorial Scholarship	Joyce L. Osborn Scholarship
Ron and Marsha Durst Scholarship	Rochester Better Chance Scholarship
Leona Engel Memorial Scholarship	Stewartville Merit-Based Scholarship
GySgt. Blaine Miller Halvorson Scholarship	Sustainable Agriculture and Forestry Scholarship
Dr. A. O. Hagen - Helen Tews Hagen Scholarship	Tiger Scholarship
Marjorie L. Seeba Holt Scholarship	Wyatt M. Coy Memorial Scholarship

Lisa Lundquist

First Homes

Lisa Lundquist's career working for various nonprofit organizations has given her the opportunity to take on many different roles and move throughout the upper Midwest. When she found a new position that would bring her to Rochester, an area she loved, she was excited. As she planned her move, she was concerned with the housing costs in the area, and it seemed like an impossibility to find a good fit. "I was making a pretty good salary and I still needed help," detailed Lisa.

A friend, who was studying urban planning, introduced Lisa to First Homes. Lisa contacted First Homes and learned about the Community Land Trust (CLT) model.

By using a CLT model, First Homes provides a subsidy investment into the home, keeping the home affordable. An income-qualified buyer can then purchase the home and enjoy the traditional benefits of homeownership, including building wealth, becoming a part of the community, and having a place to call your own. This program appealed to Lisa, she qualified, and in 2005, Lisa bought her new-construction CLT home.

Lisa would live in that home for the next 17 years, getting to know her neighbors and becoming involved in the community. She joined the board of the Rochester Public Library, served as President of the Board for the local Cystic Fibrosis Foundation, participated in a local writers group, and also joined the First Homes Board. She was happy to serve in the community and enjoy her life.

2020 proved to be an especially challenging year for Lisa, as she started experiencing some medical



I'm really proud of the work First Homes does and that is why I am honored to serve on the Board of Directors and use my experience to advocate for affordable housing.

issues, struggling with a series of falls. "I thought it was my hip," Lisa recalled.

After one of many fall incidents, in which Lisa needed to call 9-1-1, she was strongly encouraged by an EMT to accept a ride to the Emergency Room and have a physician look into the cause of these repetitive episodes. Within 24 hours, Lisa was diagnosed with a tumor on her spine and underwent surgery to remove it. Although the tumor was successfully removed, Lisa became paraplegic and required a wheelchair.

The home she had loved for 17-years suddenly became a challenge. The doorways were too narrow; the flooring was difficult to navigate with a wheelchair; the basement of her home was completely inaccessible. She worked to renovate her home to improve accessibility, but she still struggled. Living in an inaccessible home was untenable. Lisa was now a person living with a

disability, on a fixed income, with not a lot of affordable, accessible home options.

By chance in 2022, First Homes purchased a single-level home that could easily be made accessible. Our First Homes staff team thought of Lisa and if this home could be a better fit that could resolve her accessibility issues. It turns out it was a great fit.

The change in Lisa's life after moving into her new home was almost instantaneous. Lisa recalls the joy she felt when for the first time in two years, she was able to physically leave her home with ease and treat herself to a coffee from local café before attending the First Homes board meeting in person. This newly realized independence has been great for the ever-social Lisa. She beamed as she recalled, "Today my friend came over and I was able to meet her out in the driveway."

Lisa is excited to embrace her independence in an accessible home that has charm and space that suits her.

"I'm really proud of the work First Homes does and that is why I am honored to serve on the Board of Directors and use my experience to advocate for affordable housing," affirms Lisa.

With over 260 properties in the Community Land Trust, we work to serve our community through preservation and creation of affordable housing. Created in 1999, First Homes was organized to maintain a permanent supply of affordable housing within the greater Rochester area. Through strategic leadership and strong partners, the program has grown to offer a variety of homeownership options in eight Southeast Minnesota counties.

First Homes has served our community:

- 🏠 **17%** of homebuyers are families of color
- 🏠 **28.5%** of homebuyers are single parent families
- 🏠 **\$34,593** is the average income of homebuyers within the program
- 🏠 **645** adults and **432** children have been housed in a First Homes home



Emily Neville
First Homes
Program Assistant



Justin Voss
First Homes
Director of Projects



Afton Zelinski
First Homes
Director of Community
Land Trust

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Coalition for Rochester Area Housing

Each of the members of the Coalition for Rochester Area Housing is deeply committed to creating and preserving affordable housing in our community. The Coalition invested nearly \$3 million in affordable housing initiatives in 2022 including \$395,000 in deferred loans, \$535,000 in grants and \$2,050,000 in revolving loans to create and preserve 118 affordable housing units. These investments advanced all five of the Coalition's housing identified priorities which include creating new homeownership opportunities, increasing homeownership for Black, Indigenous and People of Color (BIPOC) communities, increasing housing options for households earning less than 50% of area median income, preserving existing affordable housing options, and creating additional senior housing options.

As one of their focused priorities is to increase BIPOC homeownership, the Coalition commissioned a BIPOC Homeownership Co-Design project. The 2020 Olmsted County

Comprehensive Housing Study revealed that Olmsted County had one of the largest racial homeownership gaps in the nation, with 77% of White households achieving homeownership compared to 22% for Black and African American households.

The Coalition partnered with BIPOC community members directly impacted by inequitable housing systems to identify barriers, evaluate opportunities, and to provide strategic and funding recommendations to address the homeownership gap. Ten co-designers from local communities with diverse racial, cultural, and religious backgrounds participated in the project. Report recommendations and continued partnership with local BIPOC communities and housing partners will inform future investments that aim to reduce the BIPOC homeownership gap.

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.

Revenue

Coalition for Rochester Area Housing \$353,463

Total \$353,463

Expense

Coalition for Rochester Area Housing \$823,901

Total \$823,901



JoMarie Morris

Executive Director,
Coalition for Rochester
Area Housing



Jeff Urban

Project Development and
Community Outreach Director,
Coalition for Rochester
Area Housing

Coalition Partners:



Rochester Area
Foundation



Rochester Area Foundation

Tribute Fund

In 2022, the Rochester Area Foundation Tribute Fund was created to endow pooled memorial gifts in memory of loved ones and honorariums in celebration of those who have local roots or connections to the area. Through the combined gifts made to the Foundation to honor loved ones, the principal of this fund will grow in perpetuity. Gifts made today will build a lasting legacy for the future.

Our first gifts to support this endowment were made by the family of Michael Bue in honor of Mike's community investment and impact. Barb Bue and Jessica Fallon, Mike's wife and daughter, felt that Rochester Area Foundation was the perfect place to direct memorials, knowing these gifts would benefit the community. "Mike was truly committed to the local community and was always invested in identifying ways to provide value and impact. When Mark Utz of Wendland Utz, approached our family about the Rochester Area Foundation Tribute Fund, my daughter and I knew it was the perfect gift to honor Mike while also supporting the Rochester community. Our hearts are still healing, but we know Mike's legacy will live on through the power of this Tribute Fund," affirms Barb Bue.

Each year Rochester Area Foundation will make annual grants for the betterment of our area from the earnings of this fund.

Jessica confirms her Mom's sentiment, "My dad was so proud of his involvement with RAF and the Foundation's commitment to charitable

outreach. I had the honor of interning at RAF ten years ago – an opportunity I will always cherish. It's a true privilege to collaborate with RAF in commemorating my dad's legacy. I have no doubt that he's looking down and smiling at the wonderful work RAF is doing within the community."

The Tribute Fund offered through Rochester Area Foundation gives people the unique opportunity to invest in our area in memory and in honor of friends and loved ones while improving the collective quality of life within our local communities now and into the future.



Michael and Barbara Bue, and Jessica Fallon



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Dresbach Fund

A Legacy of Caring

For 31 years, Benny and Eloise Dresbach saw the positive in the thousands of teenaged kids that came to hang out at the R-tic root beer stand in Rochester. Dubbed Benny's by most of the area teens, some referred to the iconic spot as a home away from home. Benedict and Eloise kept the menu simple, and made the advice and support abundant. Benny extolled this advice in a 1967 article, "If you talk to teenagers like adults, they'll act like adults."

May would be the time of year when Benny and Eloise would be getting the stand ready for business, and word would spread quickly. A 1965 article in the John Marshall Rocket announced that the "summer haven" would be opening soon. However, also reminding the student body that this wasn't the typical high school hang out, there were rules to follow and Benny enforced them. There was no foul language or drinking allowed on the lot, but Benny stated the kids could be as loud as they wanted. These simply stated expectations kept the kids coming back all summer and year after year.

Anne Noser, niece, said in article that she had written years ago, "They were an understanding friend to any child that needed help." Having

no children of their own, the root beer stand allowed them to take care of all the kids that came to buy a mexi-burger or a roast beef sandwich, a root beer, and a soft serve ice cream cone with sprinkles every summer.

It made sense to both Ann and Susie McClocklin, also a niece of Benny and Eloise, that when Eloise passed away she made intentional estate gifts to support children in need. One gift was made to Lourdes Foundation to open a scholarship fund that supports tuition assistance, and a second gift to Rochester Area Foundation to create an endowed fund that provides financial support, annually, benefiting two local nonprofits who assist children in crisis. Bequest gifts like the Dresbach's ensure that a donor's goals and values are honored in perpetuity.

The legacy that the Dresbach's left was not only a financial one, but also one of the lives that they touched serving root beer, ice cream and advice at the little stand on the corner of 6th St and 1st Ave SW.

Chosen Valley Community Foundation Philanthropy



Rochester Area Foundation is proud to partner with four regional community foundations to support local philanthropic investments and provide resources to strengthen these communities.

In 2022, our affiliate partners held over \$725,000 in assets with RAF for future investments into their communities.

Chosen Valley Community Foundation (CVCF) has been one of those affiliates for many years. “When the Chosen Valley Community Foundation began in 2001, we knew we’d need a fiscal partner to help us invest and manage our funds. We not only needed an organization with successful money management experience, but one dedicated to community service. Rochester Area Foundation aligned with us so well in their commitment to local philanthropy and allowed us to maximize our investment impact. Their expert advice and professional support have been invaluable to us and we are thankful to have Rochester Area Foundation as our teammate in supporting our community through giving,” states F. Mike Tuohy, founding CVCF Board Member.

Nine funds totaling over \$400,000 are currently held with RAF, including scholarship, donor advised, and endowment funds. CVCF supports local investment and fosters growth through grant awards, student scholarships, and community initiatives, promoting generosity and an opportunity to invest in the region.

Terry Bradt, Board Treasurer for CVCF affirms, “Rochester Area Foundation helps us maintain compliance in an ever-increasingly complex environment. Setting up endowed funds, donor advised funds, or scholarships in partnership with RAF greatly simplifies things on our end. RAF has

pre-built agreements and advice for any of these scenarios. This frees us up to work with our local community’s donors and grant recipients.”

In 2022, CVCF provided \$9,745 in grant awards to area initiatives. Sara Sturgis of the Chatfield Alliance shares gratitude for the grant award that they received. “After discovering that a set of community-use snowshoes were broken beyond repair, the Chatfield Alliance was awarded \$3,000 to purchase 20 new sets that will once again be available for loan to community members as well used as in high school recreation classes.”

In addition to community grant awards, some of the CVCF fund support scholarships for students pursuing continuing education in nursing, agriculture, environmental studies, and more. Over \$16,000 was distributed to students in 2022 to assist them in achieving their goals.

Rochester Area Foundation’s reach and impact extends throughout Southeast Minnesota due to the collaboration with our affiliates. The vision of building better communities for all has both depth and breadth due to these strong partnerships.

Geographic Affiliates:



Stewartville Area Community Foundation

Building a Community of Support for Local DEI Practitioners



In support of ongoing efforts to build a more equitable and inclusive community, Rochester Area Foundation’s Diversity, Equity, and Inclusion (DEI) Committee has been hosting a series of quarterly and monthly gatherings of local DEI practitioners and leaders. Participants in these meetings represent a wide spectrum of different backgrounds and sectors within our community (public, private, for profit, not-for-profit and government). The Committee’s vision is to create a space for DEI practitioners to gather together to strengthen relationships and encourage collaboration, maximize limited resources, and continue to build, improve, and promote DEI efforts within our communities. Ultimately, we are building a practitioner-driven community that uplifts and supports one another in their important work.

Here’s what some of the participants had to say about their experience as a part of this community.

“I appreciate the opportunities to network with DEI practitioners and other individuals who are interested in making Rochester a more inclusive and equitable community for all. It has been a great way to learn about the progress that other organizations are making in the DEI space. It is also gives us a forum to celebrate the successes and commiserate about the struggles that we have all experienced as a consequence of doing this important work.

— John Buhta, Southern Minnesota Regional Legal Services and Member Third Judicial District Committee for Equity & Justice

“I enjoy being in the presence of people who are committed to equity and justice. I feel hopeful after each DEI convening because I know how much positive change is possible and will be catalyzed through the work of this unique collective of people. I feel more and more thankful to be part of this community every day.

— Greg Layton, US Bank Market President and Founding Chair of RAF’s DEI Committee



The work of promoting diversity, equity, inclusion, justice, and belonging is challenging and can take a mental and emotional toll on DEI practitioners, leading to burnout. Having a support system of peers who understand the unique challenges and concerns that come with this work makes a significant difference and can lead to better outcomes for our communities' DEI work. Meeting regularly also provides practitioners with opportunities to celebrate accomplishments and a sense of energy, hope and motivation to continue to act as changemakers within their circles of influence. Additionally, the collaborations and knowledge sharing that result from these events help ongoing DEI efforts reach a wider audience and create greater impact in our communities.



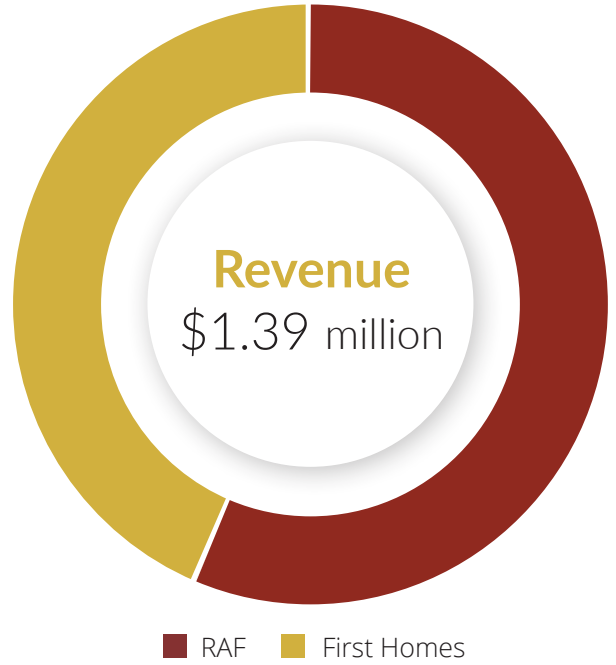
Amanda Pelley
Administrative Services &
Equity and Inclusion Manager

Rochester Area Foundation Income Statement-Operations

Revenue

Rochester Area Foundation	\$786,829
First Homes	\$606,421

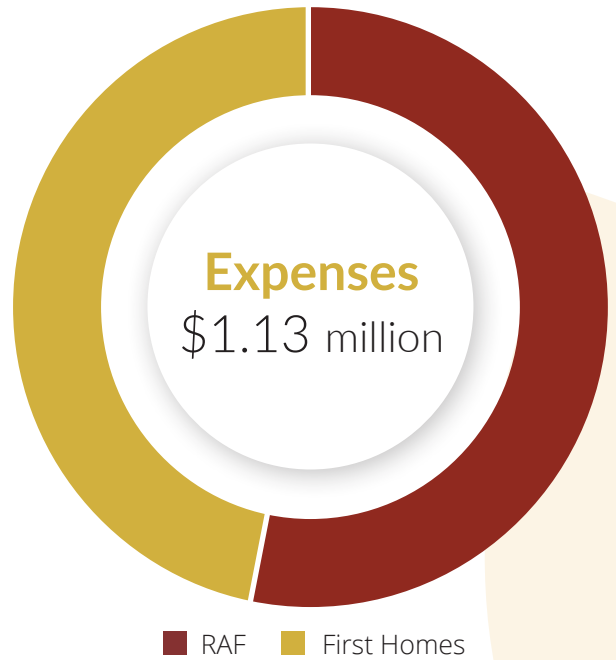
Total **\$1,393,250**



Expenses

Rochester Area Foundation	\$696,963
First Homes	\$615,314

Total **\$1,312,277**



The financial graphic shows our operating revenue and expenditures for each of our entities.

We are dedicated to using our financial resources to build better communities for all, including promoting equality of opportunities and developing effective methods to assist those in need in the great Rochester area.

RAF Investment Fund assets constitute an enduring legacy. The Investment Fund is composed of over 270 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 assets.

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

- At the end of 12/31/2021 Rochester Area Foundation had assets under financial management totaling **\$59,186,385**
- At the end of 12/31/2022 Rochester Area Foundation had assets under financial management totaling **\$61,580,580**

The Investment Fund in 2022 increased by over \$2.5M from the end of 2021.



Tim Burriss
Finance Officer

Finance Committee

- | | |
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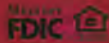


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