

Accumulated Giving \$5,390,454

Celebrating **15 YEARS** *of touching community life.*



Winona Community Foundation - Annual Report 2002

The Winona Community Foundation is touching community life for all time by:

- Gathering, preserving, and stewarding charitable capital.
- Educating the public about philanthropy and its benefits to both donors and the community.
- Partnering with other charitable organizations and with selected community initiatives.
- Making philanthropic grants to selected projects and causes consistent with our core values and principles.



Vision & Mission

Ways to Give:

We offer a variety of funds that are flexible to meet our donors' different charitable interests:

- **Unrestricted Funds**
- **Field-of-Interest**
- **Donor Advised Funds**
- **Scholarship Funds**
- **Designated Funds**
- **Organizational Endowment Funds**

**Winona
Community
Foundation**

51 East Fourth Street, Suite 314

Winona, MN 55987

Phone: (507) 454-6511 Fax: (507) 454-0441

Email: wincomf@hbc.com

Web: www.oktec.com/winona_community_foundation



Sue Cornwell
President
1990 - 2003

We dedicate this 2002 Annual Report to our founders.

In 1985, Mark Kristensen, then director of the United Way of Greater Winona Area, organized a task force to investigate the possibility of forming a community foundation in our area.

Members of the task force forged ahead and by 1987, the Winona Community Foundation was a registered not-for-profit organization with an elected

board of directors and \$2000 to give in grants to the community.

Now, fifteen years later, we salute those people who worked to create a community organization that will be indeed, "touching community life... for all time."

OUR FOUNDERS

Richard Blahnik ■
Adolph Bremer ●■
Sue Cornwell ●■
Dr. James Daniel ●

Tom Graham ●■
Pauline Knight ●■
Mark Kristensen ■

Earl Laufenburger ●
Lee Luebbe ●
Gerry Neal ●■

Patte Peterson ●■
Richard Struck ●
Mary Testor ●

Another year has flown by and the foundation has continued its progress in the service to our community. How fortunate we are that the founders saw fit to get this started, to persevere in spite of disappointments, and to provide the mechanism for future growth. Our gratitude is displayed by dedicating this annual report to them.

It would be negligent of me not to mention that the greatest gratitude of all of us is due Sue Cornwell for her years of direction of the Foundation. She has been the driving force in

all of this since its inception and, with her announced retirement set for May 31, 2003, to say she will be missed would be the grossest of understatements. Sue, we can not thank you enough, and we wish you godspeed in whatever you do next; which we can only hope is relaxing; taking it easy; and smelling the roses.


Not to be maudlin, but this is my third and final report as your chairman. I thank you all, especially the board members, for wonderful support during these years. On January 1, 2003, Kevin Mahoney assumed the post and I wish

him the very best and I hope he enjoys his tenure as much as I have.

I humbly thank all of the supporters of the Foundation –“for all time.”



Bob Gilbertson
Chairman



Chairman's Report

Legacy Society of the Winona Community Foundation

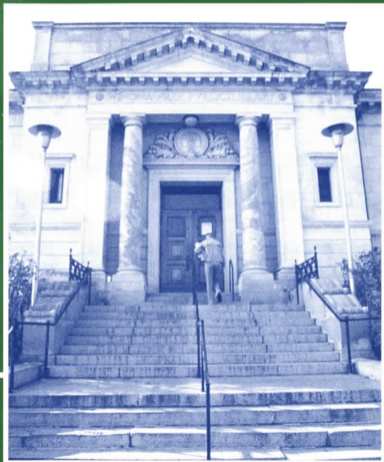
The Legacy Society of the Winona Community Foundation recognizes people who have provided for future gifts to the community through

- Bequests
- Charitable Gift Annuities
- Charitable Trusts
- Life Insurance

Those individuals who qualified in the past, or currently have agreed to be listed as members of the Legacy Society are:

Judy and Chuck Shepard, M.D.
Sue and Jack Cornwell
Erika and Robert Gilbertson

Veronica Harkenrider
Nancy and Mark Kristensen
Beverly A. Larson
Ted Maier
Ben Miller
Jennie L and Lyndon Pierce
C. Paul Venables



ARTS **MONEY GIVEN**

Home and Community Options	\$5,000
Polish Cultural Institute	1,000
Winona Fine Arts Commission	750
Action Theater	500
Winona Oratorio Chorus	500
Winona Arts Center	1,000
Cotter High School	200
Theatre du Mississippi	1,200
Winona Senior High School	100

TOTAL **\$ 10,250**

CIVIC

G.R.E.A.T. Park	\$64,333
Winona County Historical Society	2,500
Winona Area Chamber of Commerce	100
Winona Sister City Fund	2,200

TOTAL **\$ 69,133**

EDUCATION

Cotter High School	\$1,500
Franciscan Pilgrimage Fund	10,000
Sojourners	500
Resource Center of the Americas	500
Minnesota Public Radio	50
Minnesota Senior Federation	50
St. Edmond High School	1,000

Eagle Bluff Environmental Center	10,000
Catholic School Foundation	6,250
Ready Set School	500
Winona State University	1,650
Twin Cities Public Television	50
ATBO, Inc.	250
Riverway Learning Community	500
Early Learning Center	500
Women's Resource Center	500
Winona County Extension	2,250
Winona Area Public School Foundation	2,500
Cumberland College	1,000
Minnesota Private College Fund	500
Winona State University Foundation	91,000
Hiawatha Valley Education	500

Laws of Life Essay Contest	1,000
Winona Public Library	500
Winona Senior High School	1,000
Bluffview Montessori School	25,167
Fort Dodge Catholic School	10,000
St. Andrew's School	100
Friends of Winona Public Library	25
WK Elementary School	500
Luther College	250
U of M Duluth	1,000

TOTAL **\$ 171,092**

ENVIRONMENT

National Audubon Society	\$50
Mississippi River Revival	1,000



2002 Grants

Woodlawn Cemetery Association	1,000
Environmental Defense Fund	30
Nature Conservancy	400
Door County Land Trust	100
Land Stewardship Project	850
Minnesota Land Trust	1,000
Dept. of Natural Resources	25

TOTAL \$4,455

HEALTH

American Cancer Society	\$300
Winona Health Foundation	42,333
Winona Hospice Services	600
Gundersen Lutheran	500
American Heart Association	1,000
St. Anne Hospice Foundation	21,800

TOTAL \$66,533

HUMAN SERVICES

Habitat for Humanity	\$50,221
Rock Solid Youth Center	2,250
Grace Place	1,125
Home and Community Options	1,700
Gamehaven Council	150
Catholic Charities	5,000
Project FINE	5,600
United Way of Greater Winona	2,950
Witness For Peace	500
Give Us Wings	500
St. Mary's Parish	8,400
American Red Cross	22,550
Family Service	3,754
Family Research Council	200
International Christian Embassy	500
Developmental Achievement Center	1,500
Winona Rotary Service Fund	400

Big Brothers/Big Sisters	1,000
Winona ORC Industries	25
Christian Appalachian Project	500
Winona Volunteer Services	525

TOTAL \$109,350

RELIGIOUS

Faith Sound Inc.	\$250
Friends of Jesus Ministry	250
New Hope Village	1,000
Catholic Charities	1,000
Goodview Trinity Lutheran	2,000
Diocese of Winona	53,200
St. Mary's Church	28,950
Pleasant Valley Church	8,000
Far East Broadcasting Co.	1,000
Rochester Area Youth for Christ	500
St. Joseph Catholic Church	1,000

St. Bernard Church	10,000
Hermits of St. Mary of Carmel	500
St. Stanislaus Church	25

TOTAL \$107,675

ATHLETIC

YMCA	\$12,100
Winona Touchdown Club	1,000
Winona Winstars	1,000
Lions Den Youth Boxing	500
Friedman Bldg. Cornell University	5,000

TOTAL \$19,600

MISCELLANEOUS GRANTS

General Fund	\$14,100
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TOTAL OF 2002 GRANTS \$572,188

BENEFACTORS

Muriel & Dave Arnold
Erika & Bob Gilbertson
Sue & Michael Hauser
Pat & Jerry Papenfuss
Curtis Rohrer, D.D.S.
Pat & Dan Rukavina
Joyce & Pete Woodworth

PATRONS

Karen & Dennis Cleveland
Susan & Bruce Holan
Joan & William McNeil, M.D.
Marlene & John Mulrooney, M.D.

SPONSORS

Bettylou & Richard Baylon
Barbara & Tim Burchill
Ruth & Frank Bures, M.D.
Sue & Jack Cornwell
Margaret & John Cross, D.D.S.
Judy & William
Davis, M.D.
Therese & Phil Feiten
Neil Goltz
Marilyn & Henry Hansen
Shannon & Jim Hanzel
Helen Hartwick
Ann & Brian Junker
Jackie & Dave Mahlke

Lucille & David Messman
Vera & Hugh Miller
Mary Murphy
Patty & Gerald Neal
Nancy & Rod Nelson
Karen & Bud Nystrom
Carol Orłowski
Mary Frances Palmer
Geri & Bob Quinlan
Bev & Rome Ritter
Betsy & David
Rowekamp, M.D.
Frances Schuldt
Margaret Shaw Johnson
Judy & Chuck
Shepard, M.D.

Lynn & David Theurer
Debra & Tom Thompson
Kathy & Scott Turner, M.D.
Chris & Tom Wilmot, M.D.
Ellie Woodworth

PARTNERS

Rose & H J Andersen, M.D.
Bob Bambenek
Sandra & Bruce Bauer
Penelope & John Breitlow
Mike Cichanowski
Gayla Clemons
Janis & Phil Conway
Cheri & Jim Crigler

Dar & Arnold Dammermann
Eleanor Eifealdt
Carole & David Forest
Ernest Gernes
Gayle Goetzman
Margaret & Thomas Graham
Betty & George Grangaard
Norma Jane Grausnick
Jeanette Hartert
Carol & Robert Heineman
Ann Hermann
Sue & Bob Hoodecheck
David Hunter
Nancy & Mark Kristensen



Annual Contributions - General Fund 2002

Jo Ann Lanoce
Shelly & Bill Leaf
Beverly & Richard Lindseth
Ruth & Donald Marg
Ramona & Roger Metz
Joyce Miesbauer
Jan & Mark Moeller
Rosemary & Robert Shoup
J. Donald Stedman
Barbara Steele
Diane & Ron Stevens
Doloris L. Wedul
Mary Jo Wiltgen

IN MEMORY OF...

ELIZABETH MOUNCE
Mr. & Mrs. Dave Arnold

NANCY YOUNGER/JAMBOIS
Gayle Goetzman

ROY KUKOWSKI
Mike Cichanowski

PIERINA & MARION LANOCE
Joann Lanoce

EDITH & WILLIAM P. THEURER
Lynn & David Theurer

LOVED ONES
Lucille and David Messman

IN HONOR OF...

PATTE & DUANE PETERSON
50TH WEDDING ANNIVERSARY
Bettylou & Richard Baylon

MAX DEBOLT
Ruth & Frank Bures, M.D.

SUE CORNWELL
Rose & HJ Andersen, M.D.
Diane & Herb Barge
Mickey & Daniel Barr, M.D.
Darr & Arnold Dammermann

Jackie & David Mahlke
Ruth & Donald Marg
Ramona & Roger Metz
Jan & Mark Moeller
Patti & Gerry Neal
Carole & David Forest

WILLIAM RAYMOND ERBES
Lynn & David Theurer

LYDIA LYONS 100TH BIRTHDAY
Margaret & John Cross, D.D.S.

BUSINESS CONTRIBUTORS - 2002 GENERAL FUND

Bosshard & Associates
Cinderella Shoppe, Inc
Fred Picha, Enterprises, Inc.
Herff Jones, Inc.
Home Federal Savings Bank
Linda Jacobson - Consulting

Kendell Doors & Hardware, Inc.
Laehn's Hair Design & Spa
mediawerks
Ellen McVeight P.A.
Merchants Bank
Pendleton's

Technigraph Corporation
UBC - Winona
Walnut Street Dental
Wells Fargo Bank - Winona
Winona National Bank

FOUNDATIONS - 2002 GENERAL FUND

C. Paul & Irene
Venables Foundation

**STATEMENT OF FINANCIAL POSITION
AS OF DECEMBER 31, 2002**

Assets

Cash and other current assets	\$ 7,827
Contributions receivable	178,708
Investments	6,243,655
Other assets	16,111
Total assets	\$ 6,446,301

Liabilities

Accounts and grants payable	\$ 6,443
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Net Assets

Unrestricted	\$ 603,544
Restricted or designated	5,836,314
Total net assets	\$ 6,439,858
Total liabilities and net assets	\$ 6,446,301

**STATEMENT OF ACTIVITIES FOR
THE YEAR ENDED DECEMBER 31, 2002**

Support & Revenues

Contributions	\$ 1,353,665
Realized earnings on investments	312,378
Unrealized (losses) on investments	(514,486)

Miscellaneous revenue	1,577
Total support and revenue	\$ 1,153,134

Expenses

Grants	\$ 572,188
Agency program expenses	98,123
Program services	50,336
Management and general	53,430
Fundraising	10,329
Total expenses	\$ 784,406

Change in net assets	\$ 368,728
Net assets at beginning of year	\$ 6,071,130
Net assets at end of year	\$ 6,439,858



Financials

** The above financial information is not audited. Complete audited financial statements are available at the Foundation office.*

Restricted Funds

4.8 Skate Park
Action Theater
Big Brother/Big Sister
Clara Barton Fund
Country Drive Park Fund
Erika K. Scholarship Fund
Family Donor Advised Funds
Deborah Miller Kanaber Library
Improvement Fund
Friends of Winona Public Library Fund
High Wagon Bridge Restoration Fund
Home & Community Options Fund

Homer Civic Association Fund
Landon Wenonah Fountain Fund
Lion's Den Boxing Fund
Moline Historical Organ Fund
Montessori Building Fund
Montessori Scholarship Fund
Morrie Miller Scholarship Fund
Pendelton Golf Scholarship Fund
PHL "Save A Life" Fund
Polish Cultural Institute Museum Fund
Rotary Bike Path Fund

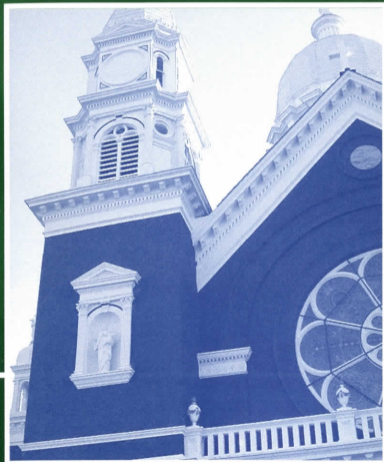
St. Charles Area Hospice
Endowment Fund
Spirit of Winona Fund
Spread the Light Campaign Fund
United Way of Greater
Winona Area Endowment Fund
Winona Art & History Project Fund
Winona Visitor Center
Expansion Fund
Winona Volunteer Services
Endowment Fund
Winona World Fair

New Funds in 2002

Dental Care Access Fund
Kendell Door & Hardware Fund

Maggie Lambert Scholarship Fund
Technigraph Corporation Fund

Family Donor Advised Funds (2)



Winona Community Foundation 2002 Board of Directors



Chairman,
Bob Gilbertson
Civic Leader

Vice-Chairman,
Kevin Mahoney
Investment Executive
Merchants Bank

Secretary,
Joyce Woodworth
Civic Leader

Treasurer,
Carol Heineman
Senior Vice-President
Winona National Bank

Chris Arnold
Co-owner
DCM-Tech, Inc.

Bud Baechler
President
mediawerks

David Bue
President
Wells Fargo Bank
(Winona)

Chuck Eddy
Co-owner
Technigraph Corporation

Karen Fawcett
Civic Leader

Rev. William Flesch
Pastor Redeemer
Lutheran Church

**Honorable Margaret
Shaw Johnson**
District Court Judge

Jerry Kellum
Attorney
Kellum Law Firm

Darrell Krueger
President
Winona State University

Bill McNeil
Physician
Dacota Pathology, Ltd.

Bud Nystrom
President
Nystrom Toyota

WINONA COMMUNITY FOUNDATION STAFF:

Sue Cornwell, President

Deb Leaf, Executive Assistant

JC Pfeiffer, Director of Finance