



WINONA  
COMMUNITY  
FOUNDATION



2007 ANNUAL REPORT

---

*One vision. Many paths.*

## VISION & MISSION

### VISION STATEMENT

The Winona Community Foundation will foster a healthy, dynamic community where all people have the opportunity to enhance the quality of their lives and the lives of others.

### MISSION

Inspired by the area's rich tradition of generosity, The Winona Community Foundation strengthens our community through philanthropy.

*Celebrating 20 years  
of serving the  
philanthropic needs  
of our region by  
connecting inspired  
donors with charitable  
passions*



## LETTERS OF

It is my pleasure to present the 2007 Winona Community Foundation Annual Report. As December marked my first year anniversary with the Foundation, I have witnessed extraordinary growth and a renewal of spirit as the Board and staff embraces the very core of what we do... make Winona better.

This past year also marked our 20th year in existence and the growth experienced in that time is a tribute to this community and those visionary individuals who realized the value of having a community foundation.

As you read through our report, it serves as a reminder of the resources in and around this community and the desire to invest in the immediate and long-term needs that exist. 2007 saw the addition of several new funds, each of which had a charitable dream brought to life through a partnership with the Winona Community Foundation. Having the ability to act as a catalyst in serving both our donors and community is a tremendous responsibility and a privilege that I find fulfilling on many levels.

2007 was a year full of growth, opportunities and challenges, not only for the Foundation, but for our community overall. The devastation of the flooding and fires saw us all working together to help our neighbors and I am pleased of the quiet role the Foundation took in those situations with financial assistance flowing quickly to where needs existed. The success WCF has seen this past year is a result of community energy that began with our Celebrity Night event and continued throughout 2007. Overall, our community continues to respond with a spirit of generosity and WCF is pleased to be a part of this spirit and process, as was the vision intended by our founders. Thank you for your part in helping us continue to keep community at the center of what we do.

**Lisa R. Fakler**

President, Winona Community Foundation

## ***Ways to Give***

We offer a variety of funds to meet the different charitable interests and needs of donors:

- Donor Advised Funds
- Field-of-Interest Funds
- Designated Funds
- Scholarship Funds
- Agency Funds
- Special Purpose Funds
- Winona Fund
- Community General Fund
- Founders Fund

## ***Mission Statement***

The Winona Community Foundation improves the quality of life in the Winona area by:

- Educating the public about the practice of philanthropy and its benefits both to donors and to the community.
- Connecting people with charitable intent and resources with organizations and causes that can advance the public good.
- Gathering, preserving, and stewarding philanthropic resources.
- Collaborating with other charitable organizations.
- Serving as a catalyst for selected community initiatives.
- Making grants to projects and causes that address both the needs and the opportunities present in the community.

# WELCOME...

Dear Friends,

I am pleased to share with you that 2007 was a very good year for your Community Foundation. This is true from a number of perspectives including leadership, team development, dollars provided, and dollars given to address needs in our community.

From a leadership perspective, we are so very pleased to have Lisa Fakler as our President. We celebrated her first anniversary in December. She is a very enthusiastic, hard working young woman who passionately strives to enhance your Foundation every day. She cares deeply about assisting donors by helping them achieve their charitable objectives. We have built a talented team and although part time, they all work full time to assist our donors by the preservation and protection of assets while facilitating the transfer of dollars to enhance our community.

To provide direction, oversight and support, we have a committed group of board members. Their talents are diverse and broad in scope. Each gives unselfishly of their time for which I am most appreciative.

Lastly, we all join in thanking you for your generous hearts and thoughtful giving. Please let our staff or board members know if there is any way we can be of further help. Please tell others about your Foundation and how we strive to assist good people to do good things for others and for this wonderful community.

Thank you for your ongoing support.

**Rod Nelson**

2007 Board Chair, Winona Community Foundation



# FINANCIAL SUMMARY

Statement of Financial Position as of December 31:

	<b>2007</b>	<b>2006</b>
<b>ASSETS</b>		
Cash and other current assets	\$18,574	\$10,573
Remainder trusts receivables	425,547	412,461
Investments	10,326,989	9,558,698
Other assets	6,753	7,525
<b>Total assets</b>	<b>\$10,777,863</b>	<b>\$9,989,257</b>
<b>LIABILITIES</b>		
Accounts payable	\$21,966	\$15,348
Payroll and other liabilities	9,002	3,462
Deferred revenue	25,247	0
<b>Total Liabilities</b>	<b>\$56,215</b>	<b>\$18,810</b>
<b>NET ASSETS</b>		
General	\$1,110,307	\$ 1,092,274
Restricted or designated	9,611,341	8,878,173
<b>Total net assets</b>	<b>\$10,721,648</b>	<b>\$9,970,447</b>
<b>Total liabilities and net assets</b>	<b>\$10,777,863</b>	<b>\$9,989,257</b>

Support, revenue and expenditures Year Ended December 31:

	<b>2007</b>	<b>2006</b>
<b>SUPPORT AND REVENUE</b>		
Contributions	\$2,013,793	\$1,152,190
Investment earnings	742,327	953,741
Other revenue	66,581	161,801
<b>Total support and revenue</b>	<b>\$2,822,701</b>	<b>\$2,267,732</b>
<b>EXPENDITURES</b>		
Community General Fund grants	\$69,143	\$96,488
Advised grants	1,788,453	1,196,465
<b>Total grants</b>	<b>\$1,857,596</b>	<b>\$1,292,953</b>
Operations		
Program services	103,051	84,472
Management and general	98,204	56,604
Fundraising	12,649	21,950
<b>Total expenditures</b>	<b>\$2,071,500</b>	<b>\$1,455,979</b>
<b>Excess of (expenditures)</b>	<b>751,201</b>	<b>811,753</b>
<b>Net assets at beginning of year</b>	<b>9,970,447</b>	<b>9,158,694</b>
<b>Net assets at end of year</b>	<b>\$10,721,648</b>	<b>\$9,970,447</b>

\*The above limited financial information is not audited. Complete audited financial statements, IRS form 990, IRS form 990-T (if required) and Minnesota Charitable Organization Annual Report are available at the Foundation office.

# 2007-2008 Board of Directors

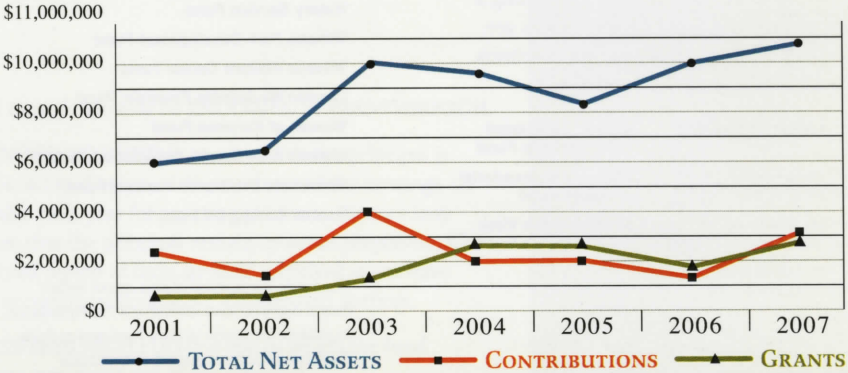
Board members work on a variety of committees to oversee the operations, management and planning for the Winona Community Foundation. These committees include: granting, finance and investments, audit, fund development, nominations, governance, executive and special purpose funds.



(Top to bottom, left to right) Chairman: **Rod Nelson**, Merchants Bank, Vice-Chairman: **Bob Bartz**, HBC, Secretary: **Mike Bernatz**, Bernatz Law Firm, Treasurer: **Jan Brosnahan**, Watlow, **Mike Allen**, Winona Health, **Steve Blue**, Miller Felpax, **Tim Burchill**, (Passed away Feb. 2007), **Sandra Burke**, Winona Volunteer Services, **Laura Eddy**, Crescendo Consulting, **Dan Florness**, Fastenal, **Gary Hayes**, DDS, Winona Health, **Donna Helble**, PhD, Winona State University, **Gabe Manrique**, PhD, Winona State University, **Leone Mauszycki**, (Resigned May 2007), **Judy Shepard**, Civic Leader, **Todd Thompson**, Wells Fargo Bank, **Dan Trainor III**, W & C Printing.

## PUTTING IT ALL TOGETHER – HISTORIC IMPACT AND SMART GROWTH

As the Winona Community Foundation continues to grow, it works to manage overall assets wisely and professionally, while still maintaining sufficient resources to support a variety of community organizations. After 21 years of work in the community, planning continues to ensure the future smart growth of assets, as well as donor education about the value of using WCF as a vehicle for long-term community charitable goals.



# FOUNDATION FUNDS

## Donor Advised Funds

Donors make charitable gifts into a named fund at the Winona Community Foundation. Over time, funding recommendations are made to the Foundation's Board for grants to qualified nonprofit organizations.

<b>Dave &amp; Muriel Arnold Family Fund</b>	<b>Linda &amp; Dale Kukowski Fund</b>
<b>Michael Arnold Fund</b>	<b>Joan &amp; William McNeil Family Fund</b>
<b>Jan &amp; Paul Brosnahan Family Fund</b>	<b>Leone J. &amp; Thomas E. Mauszycki Family Fund</b>
<b>Gerry Cichanowski Family Fund *</b>	<b>Arlene &amp; JC Pfeiffer Fund</b>
<b>Mike &amp; Linda Cichanowski Family Fund *</b>	<b>Susan &amp; Pete Roehl Family Fund</b>
<b>Karen &amp; Dennis Cleveland Family Fund</b>	<b>Dan &amp; Pat Rukavina Family Fund</b>
<b>John &amp; Margaret Cross Memorial Fund *</b>	<b>Barbara &amp; Stephen Slaggie Family Fund</b>
<b>Judith &amp; William Davis Fund *</b>	<b>Phyllis &amp; Wayne Smith Family Fund</b>
<b>Mark Deter Memorial Fund</b>	<b>S. Marie &amp; Charles R. Smith Family Fund</b>
<b>Phillip &amp; Therese Feiten Fund</b>	<b>Spirit of Winona Fund</b>
<b>Robert &amp; Erika Gilbertson Fund</b>	<b>Technigraph Corporation Fund</b>
<b>Helen Leaf Haun Fund</b>	<b>Trainor Family Fund *</b>
<b>Sue &amp; Jack Cornwall Family Fund</b>	<b>Caer &amp; John Vitek Family Fund</b>
<b>Pauline &amp; Harland Knight Family Fund</b>	<b>Wells Fargo Fund</b>
<b>Pete Kuklinski Jr. Golf Fund</b>	<b>Pete &amp; Joyce Woodworth Family Fund</b>

## Scholarship Funds

These funds are established to provide support an individual student's education beyond high school. From medicine to golf, scholarship donors may select their fund's focus, all while supporting a student's dream of a better future. Grants are awarded based on an established set of criteria evaluated by independent committees.

<b>Maggie Lambert Scholarship Fund</b>	<b>Gomez Montessori Scholarship Fund</b>
<b>Bruce McNally Family Scholarship Fund</b>	<b>Rotary Ambassadorial Visitor Fund</b>
<b>Morrie Miller Memorial Scholarship Fund~</b>	<b>Brianna Grace Vitek Scholarship Fund</b>
<b>John C. Pendelton Golf Scholarship Fund</b>	

\* denotes fund was opened in 2007

~ denotes fund was closed in 2007



## Designated Funds

When making a donation to start a designated fund the donor advises the Foundation to pay available grant dollars to a specific named organization or project.

- Clara Barton Fund**
- High Wagon Bridge Restoration Fund**
- Deborah Miller Kanaber Library Improvement Fund**
- Moline Historical Organ Fund**
- Rotary Bike Path Fund**
- Rotary International Fund**
- Winona Sister Cities Fund**
- Winona World Fair Fund**
- Winona Area Hospice Endowment Fund \***

## Special Purpose Funds

These funds support a separate charitable organization that partners with the Community Foundation and enjoys the favorable public charity status of the Foundation.

- Action Theater Fund ~**
- BK 5K Youth Fund**
- Child Abduction Protection Project (CAPP) Fund**
- CST Fund**
- Homer Civic Association Fund**
- PHL Save-A-Life Fund**
- Rotary Service Fund**
- Winona Park Development Fund**
- Winona Visitors Center Fund**
- Landon We-Noh-Na Fountain Fund**
- Women of Purpose Fund**
- Winona Area Tennis Association Fund \***
- Minnesota Beethoven Festival Fund \***
- Heroes Among Us Fund \***

The funds represented in this report reflect only those who have authorized the Foundation to publish the name of their fund and exclude the funds who have requested to remain unpublicized.

## *Agency Funds*

This type of fund enables other non-profit organizations to establish their own long-term fund at the Foundation. The Foundation handles the investment and management of the assets, distributing the earnings back to these agencies for their general purposes.

**Big Brother Big Sister Fund**

**Friends of Winona Public Library Fund**

**Bluffview Montessori Community  
General Fund**

**Polish Cultural Institute & Museum Fund**

**Margaret Simpson Home dba  
Family & Children's Center Fund**

**St. Charles Area Hospice Endowment  
Fund**

**United Way of Greater Winona Fund**

**Winona Volunteer Services  
Endowment Fund**

---

## *Field of Interest Funds*

These funds allow donors to target their gift to reflect a passion for a particular cause or area of interest. The Foundation makes grants from these funds to support the most appropriate projects within that prescribed area of interest.

**Dental Care Access Fund**

**Emergency Assistance Fund**

**Union Station Music Education Fund**

**Winona Arts & History Fund**

**Marie's Book Fund \***

All of these funds may be **ENDOWED** or **PASS-THROUGH**.

An **ENDOWED FUND** is one in which the principal is kept intact and only a certain amount of the earnings are available each year for granting purposes. Donors may require that the principal remain intact in perpetuity, for a defined period of time, or until sufficient assets have been accumulated to achieve a designated purpose.

A **PASS-THROUGH FUND** is one in which the fund Advisor may grant out of the principal.



## MINNESOTA BEETHOVEN FESTIVAL FUND

In 2007 the Minnesota Beethoven Festival Fund opened with WCF, a partnership that allowed the organizers the opportunity to create a fund using the Foundation's charitable status and bring world-class music to the community. The three-week festival, which runs from July 1st to 20th, brings a mixture of regional, national, and international talent to Winona in a series of concerts that explores the many facets of Beethoven's music.

The Minnesota Beethoven Festival Fund is about bringing classical music and people together. This includes audiences and performers alike, for just as audiences seek to experience music through concerts by great artists, performers need outlets for artistic expression. Looking towards its second season in 2008, the Festival hopes to continue to meet the needs of both groups through another exciting line-up of concerts. While Beethoven is the focus and inspiration, these concerts also highlight music stretching from the Renaissance to the 20th Century, allowing listeners to experience Beethoven's music within the context of his musical "ancestors" as well as his successors.

Whether one is a long-time Beethoven devotee or coming to him for the first time, we hope that the Minnesota Beethoven Festival's broad range of concerts will offer something for everyone.

# 2007 ADVISED GRANTS

## Arts

Action Theatre	70
City of Winona-Blue Heron project	12,500
Cotter High School	5,000
Great River Shakespeare Festival	111,100
Minnesota Beethoven Festival	309,587
Minnesota Maritime Art Museum	1,500
Polish Cultural Institute of Winona	200
Strings in Motion, Inc	100
Theatre du Mississippi	500
Winona Area Public Schools	8,300
Winona Oratorio Chorus	1,000
Winona Symphony Orchestra Assn	500
<b>Arts Grants Total</b>	<b>450,357</b>

## Athletic

Central Lutheran Church-playground equipment	5,000
Cornell University Foundation	2,500
Pete Kuklinski Junior Golf	2,354
Morrie Miller Athletic Foundation	246,954
Saint Mary's University of Minnesota	500
St. Stanislaus Middle School	5,000
Winona Area Public Schools	5,000
Winona Area Tennis Association	2,710
Winona Youth Soccer	3,100
Winona Family YMCA	17,000
YMCA Camp Olson	7,360
<b>Athletic Grants Total</b>	<b>297,478</b>

## Civic

City of Winona	13,267
Heroes Among Us	5,326
Homer Civic Association	3,500
Pickwick Mill, Inc.	1,000
The Rutherford Institute	300
Saint Mary's University of Minnesota-Veteran's Memorial	300
Veterans Memorial Park Association	5,000
Wabasha County Regional Rail Authority	150
Winona Council for Quality	35,000
Winona County Historical Society	18,750
Winona Visitor Center	841
<b>Civic Grants Total</b>	<b>83,434</b>

## Education

American Indian College Fund	250
CST Fund	38,269
Catholic Schools Foundation of Winona	500
Charles L. Sommers Alumni Assoc. Inc.	250
College of St. Benedict	7,000
Cornell University Foundation	2,500
Cotter High School	13,100
Crossroads College	1,000
Cumberland College	400
Heroes Among Us	13,899
Iowa State University Foundation	1,000
Junior Achievement	3,500
Kuemper Catholic School Foundation	10,000
Marie's Book Fund	1,340

The vast majority of funding made available through the Winona Community Foundation to local and other non-profits is initiated at the request of donors who have various funds with the Foundation.

24% .....	Arts
20% .....	Human Services
19% .....	Education
17% .....	Athletic
8% .....	Religious
5% .....	Health
5% .....	Civic
2% .....	Other



Marquette University	1,000
Minnesota Association of Scholars	2,000
Minnesota Private College Fund	2,000
Minnesota Public Radio	400
Minnesota State College-SE Tech Foundation	2,700
Northern Tier Scholarship Program	200
Oglala Lakota College	100
Orthodox Peace Fellowship of North America	500
Phillips Exeter Academy	100
Winona County-Ready Set School	2,000
Ridgeway Community Association	27,624
Ridgeway Community School	20,000
Riverway Learning Community	1,000
Rotary Club of Winona-Dictionary Project	1,949
Rushford Peterson Schools	1,000
Saint Mary's University of Minnesota	6,148
Sinte Gleska University	100
St. Edmond High School Foundation	1,000
St. Patrick's Catholic School	15,000
St. Paul Academy & Summit School	100
University of Iowa Foundation	750
University of St. Thomas	10,000
Winona Area Public Schools Foundation	16,200
Winona Area Public Schools	6,500
Winona Area Catholic Schools	500
Winona Area Catholic Schools Foundation	1,500
Winona-Dakota Unity Alliance	7,000
Winona State University Foundation	110,200
Winona State University	2,000
WOJB-FM	100
Wounded Knee District School	100
<b>Education Grants Total</b>	<b>332,779</b>

Gomez Montessori Scholarship Fund	250
Minnesota State College-SE Technical	2,000
University of Wisconsin-Stout	500
Winona State University-Admissions	1,500
<b>Scholarship Grants Total</b>	<b>4,250</b>
<b>Education &amp; Scholarships Grants Total</b>	<b>337,029</b>

<b>Environmental</b>	
Cousteaus Society	100
<b>Environmental Grants Total</b>	<b>100</b>

## Health

Alzheimer's Disease & Related Disorders	500
American Heart Association	1,000
American Cancer Society	1,750
Gundersen Lutheran Medical Foundation	4,000
Hiawatha Valley Mental Health Center (Return 2006 grant)	(10,000)
Juvenile Diabetes Research Foundation	1,000
Mayo Foundation	3,000
Rochester Medical & Relief Mission Group	100
Sauer Memorial Home	100
Saint Anne of Winona	50,000
Saint Anne Foundation	6,800
St.Elizabeth's Community Development Foundation	150
The Susan G. Komen Foundation, Inc	100
Taking Control of Your Diabetes	300
Winona Health Foundation	4,000
Winona Area Hospice Endowment	30,000
Winona Area Hospice Services	2,500
Winona State University	1,000
<b>Health Grants Total</b>	<b>96,300</b>

## Human Service

Alliance Defense Fund, Inc.	100
American Red Cross-Winona County Chapter	20,380
American Red Cross-Southeast Minnesota Chapter	334
Amnesty International	100
BK5K Youth Fund	9,095
Big Brothers/Big Sisters	8,950
Birthright	300
The Carter Center	100
Catholic Charities-Winona Diocese	30,936
Catholic Relief Services	400
Centro Capesino, Inc.	200
Channel One, Inc.	100
Child Abduction Prevention Project	2,782
Courage Center	100
Diocese of Winona	5,000
Emergency Assistance Fund	5,000
Episcopal Community Services	100
Family and Children's Center	100
Fillmore Family Resources, Inc.	29,581
Boy Scouts of America- Gamehaven Council	3,050
Give Us Wings	500
Good Fellows Fund of Winona Daily News	150
Habitat for Humanity	7,300
Home and Community Options	34,700
Houston County Women's Resources	36,747
International Rescue Committee	100
Lakota Funds	100
Minnesota Advocates for Human Rights	100
Minnesota Family Institute & Council	200
Minnesota Religious Coalition For New Hope Village	25,000
Planned Parenthood of MN, ND, SD	100
Project FINE	250
Riverfront Foundation	100

Rock Solid Youth Center	1,500
Rotary Foundation of Rotary International	1,000
Safe House International	300
The Salvation Army	1,150
The Salvation Army - Flood VISA gift cards	5,270
Samaritan's Purse	750
SEMCAC	32,358
Southeast Minnesota Rural Education & Resource Center	17,075
Southern Poverty Law Center	100
United Way of Greater Winona Area	1,450
Winona County DAC	1,000
Winona ORC Industries, Inc.	7,650
Winona Volunteer Services	52,086
Women's Resource Center of Winona	11,476
<b>Human Service Advised Grants Total</b>	<b>355,320</b>

## Religious

American Center for Law & Justice	200
American Family Association	300
Brothers of the Christian Schools	100
Cathedral of the Sacred Heart	5,500
Catholic Peace Fellowship	1,000
Christian Peacemaker Teams, Inc.	2,500
Denison University	1,000
Diocese of Winona Foundation	1,200
Diocese of Winona	33,000
Eagles Nest Ministries	200
Faith Sound, Inc.	400
Family Research Council	200
Far East Broadcasting Company	300
Focus on the Family	1,300
Hermits of St. Mary of Carmel	500
Immaculate Heart of Mary Seminary	13,500
Midwest Challenge, Inc.	200
Missionaries of Charity	1,000
Orthodox Peace Fellowship of North America	500
Pope John Paul II Cultural Foundation	500
Saint Paul's Episcopal Church	700
Saint Clare of Assisi Parish	40,000
St. Mary's Catholic Church	29,785
St. Mary's Church-Spirit Lake	1,000
St. Stanislaus Church	200
World Challenge, Inc.	500
<b>Religious Grants Total</b>	<b>135,585</b>

## Other

Transfers to WCF Administrative Endowment Fund	25,000
Transfers to WCF Founders Fund	2,500
Transfers to WCF Community General Fund	4,850
Winona Area Humane Society	500
<b>Donor Advised Other Grants Total</b>	<b>32,850</b>

**2007 Advised Grants Total**  
**\$1,788,453**



*One vision. Many paths.*

# 2007 COMMUNITY GENERAL FUND GRANTS

## Arts

Great River Shakespeare Festival	3,875
Polish Cultural Institute of Winona	6,000
Theatre du Mississippi (Return part of 2006 grant)	(4,732)
Winona Symphony Orchestra Association	1,500
<b>Community Fund Arts Grants Total</b>	<b>6,643</b>

## Athletic

Winona Area Public Schools Foundation-baseball	2,500
<b>Community Fund Athletic Grants Total</b>	<b>2,500</b>

## Civic

Pickwick Mill, Inc.	9,500
<b>Community Fund Civic Grants Total</b>	<b>9,500</b>

## Education

Madison Elementary School	1,000
Ridgeway Community School	5,000
Winona State University Foundation	7,000
<b>Community Fund Education Grants Total</b>	<b>13,000</b>

## Environmental

Parks & Trail Council of Minnesota	6,000
<b>Community Fund Environmental Grants Total</b>	<b>6,000</b>

## Human Services

Elder Network	2,000
Home and Community Options	7,500
Project FINE	7,500
Winona Volunteer Services	5,000
<b>Community Fund Human Service Grants Total</b>	<b>22,000</b>

**2007 Community Fund Grants Total 59,643**

## 2007 Winona Fund and Youth in Philanthropy (YiP) Grants

### Education

Immanuel Lutheran School	250
Rushford Peterson Schools-Daycare	750
Winona Area Public Schools-"On the ball"	250
Winona County DAC	500
<b>Winona Fund and YiP Education Grants Total</b>	<b>1750</b>

### Health

Hiawatha Valley Mental Health Center	650
<b>Winona Fund and YiP Health Grants Total</b>	<b>650</b>

### Human Service

Big Brothers/Big Sisters	1,000
Family and Children's Center	300
Home and Community Options	500
Gifts for Winona	300
<b>Winona Fund and YiP Human Service Grants Total</b>	<b>2,100</b>

**2007 Winona Fund and YiP Grants Total 4,500**

The Winona Community Foundation Board makes grants from our Community General Fund in various ways throughout the year. The main process is through a competitive cycle held twice a year with awards going to area non-profit organizations for projects meeting community needs. Applications are reviewed by our volunteer Grants Committee and ranked based on established criteria. Other awards from this pool of assets are allocated through modest Winona Fund grants responding to current needs that may not fit within the competitive cycle timeline. Youth in Philanthropy grants are awarded through yet another unique competitive process which involves youth review of applications. Finally, the Founders Fund award involves a nomination process that selects an individual who has touched our community for all time and the accompanying grant award goes to the local charity of the recipient's choice.

34%	.....Human Services
28%	.....Education
14%	.....Civic
10%	.....Arts
10%	.....Environment
4%	.....Athletic



## 2007 Founders Fund

### Education

Saint Mary's University of Minnesota	5,000
<b>2007 Founder's Fund Grants Total</b>	<b>5,000</b>

**2007 Community General Fund Grants Total**  
**\$69,143**

(includes competitive grants, Winona Fund, Youth in Philanthropy & Founders Fund)

# YOUTH IN PHILANTHROPY

*Teaching the Art of Giving* is a concept that can be introduced at any age, but has an even greater impact when working with our youth. Enabling young people to grant funds, within structured guidelines, to another group or need establishes a sense of empowerment and community. The Youth In Philanthropy program of Winona Community Foundation partnered with community schools at three levels, allowing our youth to learn about giving and the granting process.

At the elementary level the students found it difficult to go through the necessary process of elimination, agonizing over the various projects and wanting to maximize the dollars they were allocated, the 2nd grade students awarded grants to the Winona Developmental Achievement Center (DAC) for a tactile teaching board, Immanuel Lutheran School for the purchase of a sky runner for the playground, and Jefferson Elementary School 3rd grade class to purchase exercise balls for students to sit on during class.

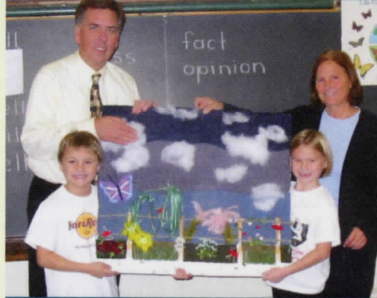
The Alternative Learning Center students awarded their grant funds to Big Brothers/Big Sisters for local extracurricular activities and civic programs. College students at Winona State University split their award between Home & Community Options to replace flood damaged furniture and to Winona Farm's Greenest of the Green, a project for paper towel recycling at Winona schools.

Aristotle wrote, "To give away money is an easy matter with in every man's power but to decide to whom to give it and how large and when, and for what purpose and how, is neither in every man's power nor an easy matter." Discussions with the students revealed that engaging in this process made them realize how difficult granting was, yet it made them "feel good." And when one second grade student was asked why we give things away, she replied, "To make them (people) feel better and show that you care."

It is WCF's hope that in planting these seeds the lessons learned about the art of giving will follow these young people throughout their lives and they will continue to share this with others.



*Deb Leaf (WCF staff) handing out ranking ballots to 2nd grade students at Washington-Kosciusko School.*



*Luke Merchlewitz and Deb Leaf with students Cameron Hawkinson and Callie Van Dyke displaying DAC's sample tactile board.*

## Founders Fund



*Barb Burchill accepting in Tim's honor and awarding check to Deb Ward, program director for SMU's Masters in Philanthropy program*

The Founders Fund was created to honor all of the individuals who planted the seed for the Winona Community Foundation in the 1980's. This endowed fund awards recognition to a local community member who has made a lasting impact on our area for the betterment of all. The recipient is given the honor of choosing a local charity to receive the grant which comes with the award. Past recipients have included Saint Mary's University president Louis De Thomas, past Winona State University president Dr. Darrell Krueger, and community volunteer Ms. Gloria Ames. The 2007 award was accepted by Barb Burchill in memory of her husband Tim Burchill. Tim was serving a role on the Foundation's Board of Directors when he unexpectedly passed away on February 20, 2007. Tim's life and career were dedicated to philanthropy and his mission will be continued through the Masters in Philanthropy and Development program at Saint Mary's University of Minnesota, which was the recipient of the grant award in his honor.

# 2007 CELEBRITY NIGHT

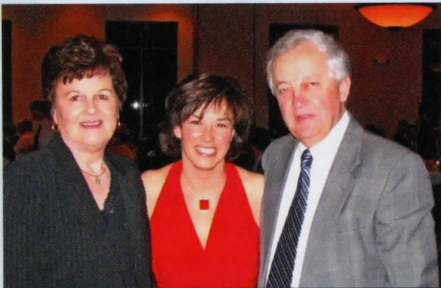
For those who attended the 2007 Celebrity Night dinner, they can attest to the fact that the energy in the room was palpable. This was the energy of a community gathering—the energy that is created when individuals feel good about being a part of something larger and they have the opportunity to connect with others who feel it too. This event was about raising funds, friends and awareness through a celebration of the Winona community and the many ways the Foundation supports it.

To match a generous \$25,000 challenge, individuals and businesses showed their community support by purchasing tickets, making donations, being sponsors and even donning aprons at the event.

And the challenge was met—net event proceeds, including the challenge match, were over \$60,000. These proceeds go towards growing the Foundation's Community General Fund which grants to local non-profit projects meeting key area needs and helps increase overall investment capability resulting in greater returns to give back to the community on a continuous basis over the long-term.



*WSU basketball players wearing aprons and helping as "Community Servers" during 2007 Celebrity Night dinner, shown here with guest Paula Krofchalk.*



*Mystery challenge donors Muriel & Dave Arnold with WCF president Lisa Fakler*

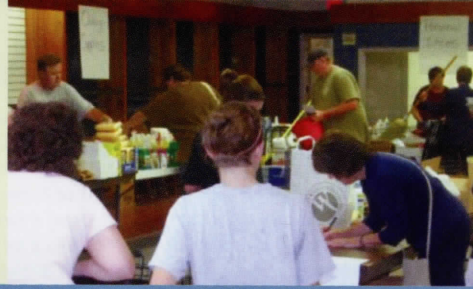
With the challenge being met during the event, Dave and Muriel Arnold allowed us to reveal them as the donors of this gift so we could tell the story of why they had given. Making the gift through their donor-advised fund with the Foundation, they wanted to inspire others to give and to explain the importance of this service.

Donor-advised funds allow charitable gifts to be made into a named fund that is managed and administered by the Foundation. The tax benefit is received at the time of the gift to the Foundation, yet then over time donors can make

grant recommendations from the fund to nonprofit organizations that are then approved by the Foundation's Board—and yes, the Foundation itself can be a recipient of these funds through transfers.

Celebrity Night is more than an evening where people dress up, have a fancy meal and are entertained—it represents a sense of community belonging and giving. Thank you to all attendees, sponsors, donors and celebrity servers for making the 2007 event such a success.





*Photos from the make-shift mall store to help residents with their clean-up efforts.*

## THE FLOOD OF 2007

A stormy August night forever changed the lives of people across this region. This disaster brought us together as a community, and by helping each other and rebuilding it has allowed us all to begin healing from the scars it left behind. Coordinating these efforts continues to be a concern that our community has worked hard to address. Many groups came together to pool efforts and resources and WCF was proud to be part of that process.

Through the Emergency Assistance Fund at the Winona Community Foundation, the capacity was available to assist in immediate relief efforts and support on-going work by partner agencies on the frontline of helping victims in Fillmore, Houston and Winona County. One example of the impact this Fund allowed, was the provision of debit cards for distribution to victims through Winona Volunteer Services in the days immediately following the disaster, while national Red Cross services were being coordinated.

As time passed and further needs unfolded, the Foundation continued to collaborate with local agencies and assisted donors in directing gifts where help was needed. Marie's Book Fund, established in memory of teacher Marie Mahle (Deters/Johnson) of Eitzen, MN, was one effort that provided books to families affected by the flood. Other gifts were able to be made through donor advised funds and even through the Foundation's own Winona Fund, with grant assistance to replace lost daycare equipment in Rushford.

The social, financial, physical and emotional impact of this natural disaster will be felt for years as families attempt to rebuild their homes and their lives. Yet, it is reassuring to know that despite the length of time the recovery will take, the people of this area are committed to helping each other and the Foundation is proud to be a connector in these efforts.

## Community General Fund Donors

The Foundation's Community General Fund is the resource from which grants twice a year are allocated to organizations in the Winona area. Competitive grant applications are submitted and funding is based on a set of granting guidelines and criteria.

Kim & Mike Allen  
Mike Arnold Fund  
Muriel & Dave Arnold  
Muriel & David Arnold  
Family Fund  
Stacey & Chris Arnold  
Jeni & Dan Arnold  
Rebecca & Bud Baechler  
Jane & Robert Bartz  
Sandy & Bruce Bauer  
Denise & Michael Bernatz  
Jane & Scott Biesanz  
Kathy & Steve Biesanz  
Patti & Ted Biesanz Jr.  
Deb & Scott, Birdsall, M.D.

Ann & Steve Blue  
Judy Bodway  
Penelope & John Breitlow  
Colleen & Bernhard Brenner  
Drs. Laurie & Mathew  
Broghammer  
Loretta & Mark Bronson  
Jan & Paul Brosnahan  
Nancy & James Brown  
Sandra & Brian Burke  
Mary Burchichter & Robert Kierlin  
Dee & George Cipov  
Gayla Clemmons  
Karen & Dennis Cleveland  
Sue & Jack Cornwell

Judy & Bill Davis, M.D.  
Vicki & Dennis Decker  
Laura & Chuck Eddy  
Susan & John Eddy  
Ramona & Bud English, D.D.S.  
Dawn & Kent Erdman  
Andrea & David Essar, Ph.D  
Lisa Ramsey Fakler  
Karen & O.J. Fawcett  
Phil Feiten  
Therese & Phil Feiten Fund  
Laura & Raymond Feller III  
Sharon & Dick Flatten  
Jennie & Dan Florness  
Priscilla & Michael Flynn, D.D.S.

Joette & Michael Gostomski  
Lisa & Aaron Hanesworth, M.D.  
Shannon & Jim Hanzel  
Jean & Gary Hayes, DDS  
Carol Heyl & Donald Stone  
Susanne & Robert Hoodecheck, M.D.  
Dr. Sid Hughes  
Margaret Shaw & Bruce Johnson  
Ann & Brian Junker  
Dragana & Peter Jurkovic  
Bev & Jack Kieper  
Wendy & John Killen  
Lois & Tony Kochevar  
Bill Laehn  
Ann Lavin & Kevin Possin  
Cindy & John Leaf  
Deb & Bob Leaf  
Karen & Ed Littlejohn  
Dr. Laurel & Jeffrey Logas  
Laurie Lucas  
Jacqueline & David Mahlke  
Cecilia & Gabriel Manrique  
Dr. Thomas E. & Leone J. Mauszycki  
Leone J. & Thomas E.  
Mauszycki Family Fund  
Joan & Bill McNeil, M.D.  
Joan & Bill McNeil Family Fund  
Ramona & Roger Metz  
Mark Metzler  
Joyce Miesbauer  
Susan & Jerry Miller  
Vera & Hugh Miller  
Sally & Ken Mogren  
Marlene & John Mulrooney, M.D.  
Patricia & Gerald Neal  
Nancy & Rod Nelson  
Patricia & Dennis Nolan, M.D.  
Karen & Bud Nystrom  
Shirley & Will Oberton  
Sue & Kevin O'Reilly  
Carol Orlowski  
Pat & Jerry Papenfuss  
Liz & Todd Paulson  
Gabrielle & Brad Peterson  
Patricia & Duane Peterson  
Geri & Bob Quinlan  
Judy & Jack Richter  
Roehl Family Fund  
Rukavina Family Fund  
Fatima Said  
Wendy Sandvig  
Marilyn Schwab  
Juleanne & Cullen Schwemer, M.D.  
Judy & Charles Shepard, M.D.  
Gloria Siewert  
Barbara & Stephen Slaggie  
Judy & David Stoltman

Angela & Todd Thompson  
Bonnie & Allyn Thurley  
Cassy & Brian Thurow  
Brad Turner & Ellyn English  
Kathy & Scott Turner, M.D.  
Karen & Ed Urbick  
Sara & Graig Vanderleest  
Deborah Ward  
Deborah White  
Mary & Bill Wiczorek  
Debra Wildenborg  
Chris & Tom Wilmot, M.D.  
Sue & Brian Wolfe  
Bonnie Woodford  
Betty & John Woodworth  
Joyce & Pete Woodworth  
Joyce & Pete Woodworth Family

### ***Business***

Blooming Grounds Coffee House  
Brosnahan Law Firm, PA  
Cindy L Davis Law Office  
Downtown Dental  
Hal Leonard Corporation  
Hawkins, Ash, Baptie & Co., LLP  
Hiawatha Broadband  
Communications  
Holiday Inn & Suites  
HyVee  
Laehn's Hair Design & Spa  
McDonalds of Winona  
Merchants Bank  
Miller Felpax Corporation  
MCC  
National Chemicals, Inc.  
RTP  
Spalon 1161  
Duane Fakler -  
State Farm Insurance  
Water Systems Co  
Watkins, Inc.  
Watlow Winona, Inc.  
WinCraft, Inc.  
Winona Daily News  
Winona Golf & Dining  
Winona Lighting  
Winona National Bank  
Winona Post  
Winona Radio  
Wolter & Raak, Ltd

### ***Foundations***

Venables Foundation

### ***Founders' Fund***

Arlene & JC Peiffer  
Rukavina Family Fund  
Winona National Bank

### ***Thomas H. Laken Administrative Endowment Fund***

Thomas H. Laken Sr. Fund  
Muriel & David Arnold Family Fund

In 2006 the Thomas Laken Administrative Endowment Fund was established. This fund is under direction of the Winona Community Foundation and as it grows, will be used to help with overall operational expenses to ensure the longevity of the organization.

### ***In Memory Of***

Robert Bublitz  
Shirley & Will Oberton

Tim Burchill  
Ruth & Frank Bures, M.D.  
Sue & Jack Cornwall  
Dr. Thomas E. & Leone J.  
Mauszycki  
Karen & Bud Nystrom  
H.T. and Edna Mae  
Cleveland  
Karen & Dennis Cleveland

John Cross, DDS  
Judith & Angus Callendar  
Carole & Alan & Nelson

Margaret Cross  
RoseMarie & H.J. Andersen, M.D.  
Penelope & John Breitlow  
Susan & Dr. Robert Briggs, D.D.S.  
Ruth & Frank Bures, M.D.  
Kathy & Chris Carroll, D.M.D.  
Marilyn & George Cipov  
Carolyn & Renato DeMatta  
Judith Durley  
Shelly & Fred Fletcher

Robert Kohner  
Curtis Mihm  
Norma & Duane Plank  
Sue & Pete Roehl  
Judith Stark  
Sara & Graig Vanderleest  
Mary & James Wadden

Victor Erdmann  
Dawn & Kent Erdmann

Geoff Gardner  
Karen & Bud Nystrom

William Heise  
Judith & Angus Callender

Colleen Hughes  
Sid Hughes, M.D.

George Joyce  
Susan & Dr. Robert Briggs, D.D.S.

Fred King  
Robert Briggs, D.D.S.

Marie Mahlke  
Beth Heckman Nelson

Stuart Miller  
Sandy & Bruce Bauer

Donald Nelson  
Dawn & Kent Erdmann

David Peplinski  
Donna Peplinski

Paul Roney  
Karen & Dennis Cleveland

Dan Trainor II  
Dan & Shelley Trainor  
Joanne Trainor

Brianna Grace Vitek  
Janet & Bill Baker  
Jan & Andrew Blomsness  
Carol & Robert Brown  
Deb & Rick Christenson  
Linda & Robert Heath  
Kris & John Nett  
Judith & Gregory Novotnu  
Kathy & Steve Pederson  
Katy & Matt Smith  
Caer & John Vitek

Joan & David Bernard  
Frances & John Edstrom  
Marie & Keith Holmquist  
Jezewski Trust

Marcella Langowski  
Donna Helble  
Ellen Blondell

... to the many other donors who may have been missed...

Thank you

## *In Honor Of*

Sue Cornwell  
John Breittlow

Anniversary of Robert & Erika Gilbertson  
Mary Bergland  
Sue & Jack Cornwell  
Marilou & Carl Kiehnbaum

Marriage of Judy Baylon & Dave Stoltman  
Shirley & Will Oberton  
Gayle Goetzman

Doris Vculek  
Karen & Dennis Cleveland

### Additional Donors

Marlene & Robert Kohner in memory of Margaret Cross

## *Legacy Society*

Funds may be created to support philanthropic goals now, or to benefit the community in the future. The Legacy Society of the Winona Community Foundation recognizes people who have provided for future gifts to the community through bequests, charitable trusts, charitable gift annuities, life insurance. Those individuals who have qualified in the past or currently have agreed to be listed as members of the Legacy Society include:

Erika & Robert Gilbertson  
Nancy & Mark Kristensen  
Beverly Larson  
Helen Leaf Haun  
Dr. Thomas E. & Leone J. Mauszycki  
Jennie L. Pierce  
Judy & Charles Shepard, M.D.

*We thank these philanthropic-minded individuals for their gifts now that will benefit lives in the future. If you have provided for a future gift to the Winona Community Foundation and would like to be listed as a Legacy Society member, or if you would like further information, please contact the Foundation.*



*One vision. Many paths.*

**Exchange Building**

51 East 4th Street, Suite 314 Winona, MN 55987

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

preswcf@hbc.com [www.winonacommunityfoundation.org](http://www.winonacommunityfoundation.org)