

*One vision.  
Many paths.*



*2010 Annual Impact Report*



**WINONA  
COMMUNITY  
FOUNDATION**

# VISION & MISSION

## Mission

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



## 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.

## THROUGH THE LOOKING GLASS...

*Celebrating 23 years of serving the philanthropic needs of our region by connecting inspired donors with charitable passions.*

### **Dear Friends of the Winona Community Foundation,**

It has been my pleasure to serve as the chairperson of the Board of Directors of the Winona Community Foundation for the calendar year 2010. It always amazes me at the amount of time, talent, skill, and dedication these insightful individuals have provided to continue the growth and advancement of the Foundation. They have been assisted by our very capable, efficient, qualified and energetic professional staff. Tina Anderson recently completed her second year as President of the Winona Community Foundation where she assembled a wonderful staff. Jeni Arnold provides solid leadership as the Grant Program and Development Director. Bruce Kaiser, Finance Director, was instrumental in the smooth transition of a new software program to support the day-to-day management of the Foundation and provide more complete financial data for donors. The Board is grateful for their service.

In January 2010, the Board and professional staff held a retreat to develop goals for the Foundation for the next three to five years. After much thoughtful discussion, Four Strategic Initiatives were identified and selected to pursue during 2010. They include the following:

1. Continue to grow the base of contributions.
2. Tell our story so people see the value in our purpose.
3. Understand and identify the causes and needs in Winona.
4. Increase grants made by taking more risks, easing restrictions and improving the process for application.

For each of these initiatives, champions and committees were selected, conditions of satisfaction were established, launch activities were planned, in addition to the development of a three- year action plan. The Foundation has always been strong and these initiatives, I feel, will continue to help us to continue to grow and prosper in the 21st century.

The Winona Community Foundation continues to maintain a strong financial position. Fiscal year 2010 ended with net assets of over \$10.1 million, an increase of \$258,000 from fiscal year 2009. The total grants dispersed during 2010 were \$1,027,611. Of this total, \$984,071 came from the generosity of our wonderful donor-advised funds and \$43,040 from the coffers of the Winona Community Foundation. The Foundation board and donors saw the need in our community and were able to help new and existing programs flourish. Thank you!

Life in Winona and the surrounding area remains positive for the citizens because of the continuing success of the Winona Community Foundation. I look forward to 2011.

Sincerely,

A handwritten signature in dark ink that reads "Donna J. Helble". The signature is fluid and cursive.

Donna J. Helble, Ed.D  
2010 Chairperson, WCF Board

## 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.

## 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
- Community Granting Fund
- Founders Fund

## 2010 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.



(From Top Left) Chair: Donna Helble, PhD, Winona State University; Vice-Chair: Gabriel Manrique, PhD, Winona State University; Secretary: Sandra Burke, Winona Volunteer Services; Treasurer: Mike Allen, Winona Health; Past-Chair: Bob Bartz; Steve Blue, Miller Felpax; Laura Eddy, Crescendo Consulting, LLP; Dan Florness, Fastenal; Dan Trainor III, W & C Printing, Andy Blomness, Winona YMCA; Judy Davis, Educator, Shelley Milek, Civic Leader; Garry Watts, Winona Agency; Laurie Lucas, Civic Leader; Tom Wynn, Peerless Chain

# FINANCIAL SUMMARY

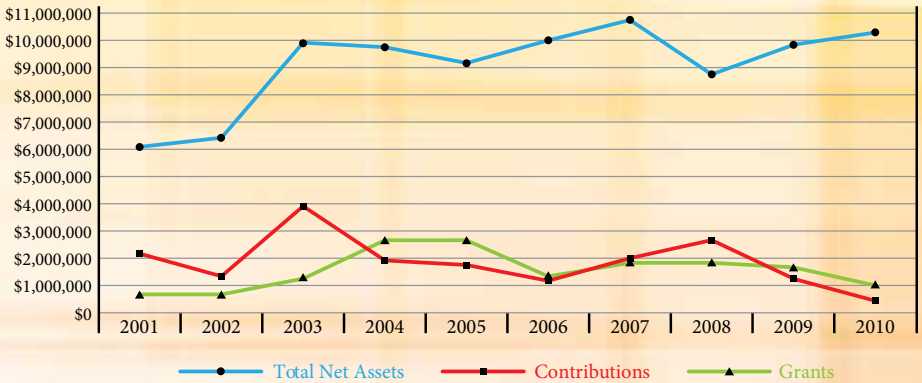
Statement of Financial Position as of December 31:	2010	2009
<b>ASSETS</b>		
Cash and other current assets	\$15,956	\$10,015
Remainder trusts receivables	308,981	293,440
Investments	9,826,593	9,612,834
Other assets	7,564	9,506
<b>Total assets</b>	<b>\$10,159,094</b>	<b>\$9,925,795</b>
<b>LIABILITIES</b>		
Accounts payable and accrued liabilities	\$12,017	\$19,048
Grants Payable		17,800
<b>Total Liabilities</b>	<b>\$12,017</b>	<b>\$36,848</b>
<b>NET ASSETS</b>		
General	\$563,878	\$590,881
Restricted or designated	9,583,199	9,298,066
<b>Total net assets</b>	<b>\$10,147,077</b>	<b>\$9,888,947</b>
<b>Total liabilities and net assets</b>	<b>\$10,159,094</b>	<b>\$9,925,795</b>
Support, revenue and expenditures Year Ended December 31:	2010	2009
<b>SUPPORT AND REVENUE</b>		
Contributions	\$499,922	\$1,272,497
Investment earnings (losses)	919,262	1,701,253
Other revenue	121,464	118,115
<b>Total support and revenue</b>	<b>\$1,540,648</b>	<b>\$3,091,865</b>
<b>EXPENDITURES</b>		
Community General Fund grants	\$43,540	\$57,934
Advised grants	984,071	1,689,731
<b>Total grants</b>	<b>\$1,027,611</b>	<b>\$1,747,665</b>
Operations and investment expense	254,907	216,572
<b>Total expenditures</b>	<b>\$1,282,518</b>	<b>\$1,964,237</b>
<b>Excess of revenue (expenditures)</b>	<b>\$258,130</b>	<b>\$1,127,628</b>
<b>Net assets at beginning of year</b>	<b>9,888,947</b>	<b>8,761,319</b>
<b>Net assets at end of year</b>	<b>\$10,147,077</b>	<b>\$9,888,947</b>

\*The above limited financial information is not audited.

Complete audited financial statements are available at the Foundation office.

## Putting it All Together – Historic Impact and Smart Growth

Winona Community Foundation looks to the future; it works to manage overall assets wisely and professionally, while still maintaining sufficient resources to supported a variety of community organizations. Working with the advisors, WCF maps out the future to ensure the growth of assets, as well as donor education about the value of using WCF as a vehicle for long-term community charitable goals.



	Total net assets	Contributions	Grants
2001	\$6,071,128	\$2,219,049	\$682,604
2002	\$6,453,154	\$1,353,666	\$670,310
2003	\$9,922,635	\$3,928,863	\$1,286,303
2004	\$9,801,103	\$1,967,801	\$2,703,093
2005	\$9,158,694	\$1,809,654	\$2,742,108
2006	\$9,970,447	\$1,152,190	\$1,292,953
2007	\$10,708,919	\$2,013,791	\$1,858,487
2008	\$8,761,319	\$2,638,109	\$1,872,786
2009	\$9,888,947	\$1,272,497	\$1,747,665
2010	\$10,147,077	\$499,922	\$1,027,611

# 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.

Dave & Muriel  
Arnold Family Fund

Michael Arnold &  
Retirement Navigators Fund

Jane and Bob  
Bartz Family Fund\*

Jan & Paul  
Brosnahan Family Fund

Gerry Cichanowski  
Family Fund

Mike & Linda  
Cichanowski Family Fund

Karen & Dennis Cleveland  
Family Fund

John & Margaret  
Cross Memorial Fund

Judith & William Davis Fund

Mark Deter Memorial Fund

Chuck and Laura  
Eddy Family Fund\*

John and Susan  
Eddy Family Fund\*

Phillip & Therese Feiten Fund

Robert & Erika  
Gilbertson Fund

Helen Leaf Haun Fund

Sue & Jack  
Cornwell Family Fund

Pauline & Harland  
Knight Family Fund

Linda & Dale  
Kukowski Family Fund

Leonard Lopez  
Memorial Fund

Joan & William  
McNeil Family Fund

Leone J. & Thomas E.  
Mauszycki Family Fund

Jeremy and Janel  
Miller Family Fund^

Mr. Morris Extra Chance

Patricia & Jerry  
Papenfuss Family Fund

Arlene & JC Pfeiffer Fund

Dan & Pat  
Rukavina Family Fund

Barb & Steve  
Slaggie Family Fund

Phyllis & Wayne  
Smith Family Fund

S. Marie & Charles R.  
Smith Family Fund

Technigraph Corporation  
Fund-

Shelley and Dan Trainor III  
Family Fund\*

Trainor Family Fund

Caer & John  
Vitek Family Fund

Wells Fargo Fund-

Pete & Joyce  
Woodworth Family Fund

Barbara and Tom  
Wynn Family Fund\*

## *Designated Funds*

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

Clara Barton Fund  
(Red Cross Winona County Chapter)

Friends & Deborah Miller Kanaber Library  
Rotary International Fund

Winona Area Hospice Endowment Fund  
Winona Area Track & Field Project

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## *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.

Maggie Lambert Scholarship Fund

Bruce McNally Family Scholarship Fund

Morrie Miller Memorial Scholarship Fund

John C. Pendelton Golf Scholarship Fund-

Gomez Montessori Scholarship Fund

Rotary Ambassadorial Visitor Fund

Brianna Grace Vitek Scholarship Fund

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## *Special Purpose Funds*

These Funds support a separate charitable organization that attaches itself to the Community Foundation and enjoys the favorable public charity status of the Foundation.

BK 5K Youth Fund

Dive and Rescue Fund\*

Emergency Response Team Fund\*

Hiawatha Valley Marines Fund\*

High Wagon Bridge Restoration Fund

Homer Civic Association Fund

Pete Kuklinski Jr. Golf Fund

Masonic Temple Restoration Fund\*

Midwest Music Fest Fund\*

Moline Historical Organ Fund

PHL Save-A-Life Fund

Rotary Bike Path Fund

Rotary Service Fund

Spirit of Winona Fund

Winona Park Development Fund

Winona Sister Cities Fund

Landon We-Noh-Na Fountain Fund

Women of Purpose Fund

Winona Area Tennis Association Fund-

Winona World Fair Fund

Winona Arts & History 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**  
**Marie's Book Fund**  
**Pfeiffer Land Fund**  
**Technology in the Classroom Fund\***

## *Agency Funds*

These Funds enable 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**  
**Bluffview Montessori Community General Fund**  
**Polish Cultural Institute & Museum Fund**  
**Margaret Simpson Home Fund dba Family & Children's Center**  
**St. Charles Area Hospice Endowment**  
**United Way of Greater Winona Fund**  
**Winona Volunteer Services Endowment Fund**

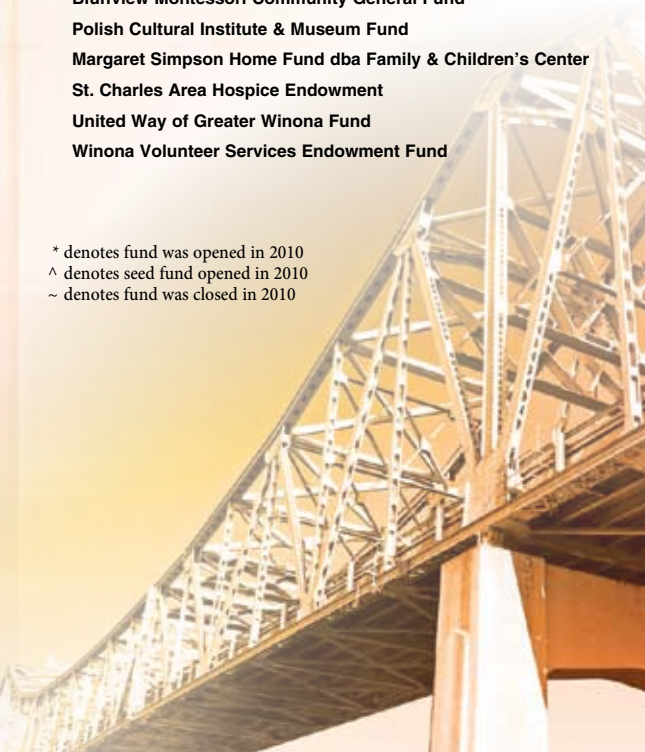
\* denotes fund was opened in 2010  
^ denotes seed fund opened in 2010  
~ denotes fund was closed in 2010

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

These funds may be pass-through or endowed.

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



# 2010 WCF ADVISED GRANTS

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.



35%.....	Education
27%.....	Human Services
13%.....	Arts
7%.....	Civic
6%.....	Health
6%.....	Religious
5%.....	Athletic
1%.....	Other
0%.....	Environment

## Arts

Fergus Falls Center for the Arts, Inc.  
 Fine Artist of Southeastern Minnesota  
 Great River Shakespeare Festival  
 Minnesota Beethoven Festival  
 Minnesota Maritime Art Museum  
 Pavak Museum of Broadcasting  
 Polish Cultural Institute of Winona  
 Theatre du Mississippi  
 Winona-Dakota Unity Alliance  
 Winona Oratorio Chorus

**Arts Grants Total** **\$131,950**

## Athletic

City of Goodview  
 Lewiston High School Activity Fund  
 MN. Youth Ski League  
 Morrie Miller Athletic Foundation  
 Ridgeway Community School  
 Winona Senior High School  
 Winona State University Foundation  
 Winona Family YMCA  
 YMCA Camp Olson

**Athletic Grants Total** **\$46,050**

## Civic

City of Winona  
 Homer Civic Association  
 Otter Trail-Wadena Community Action Council  
 The Salvation Army  
 Second Chance Jail Services  
 State Services for the Blind  
 Winona County Fair  
 Winona County Historical Society  
 Winona Steam Collopie Association

**Civic Grants Total** **\$70,126**

## Education

Bluffview Montessori School  
 Caledonia Library  
 The Carroll School  
 Catholic Schools Foundation of Winona  
 Cotter Schools  
 Hope Lutheran High School  
 Houston Public Library  
 Jefferson Elementary School  
 Junior Achievement  
 Marquette University  
 Minnesota Private College Fund  
 Minnesota State College-SE Tech Foundation  
 Myrick Hixon Ecopark  
 Orthodox Peace Fellowship of N.America  
 Phillips Exeter Academy  
 Ridgeway Community Association

Riverway Learning Community	
Saint Mary's University of Minnesota	
San Miguel Middle school of Minneapolis	
Sommers Alumni Association	
St. John's School of Theology	
St. Paul Academy & Summit School	
St. Mary's Catholic Church	
University of Minnesota Duluth	
University of St. Thomas	
University of Wisconsin-Madison	
Winona Area Public Schools Foundation	
Winona Area Public Schools-High School	
Winona Area Public Schools	
Winona Area Catholic Schools	
Winona Area Catholic Schools Foundation	
Winona County-Ready Set School	
Winona Public Library	
Winona State University Foundation	
<b>Education Grants Total</b>	<b>\$342,053</b>

### Environment

Mississippi River Revival	
Nature Conservancy	
Yosemite Conservancy	
Pfeiffer Land Fund	
<b>Environment Grants Total</b>	<b>\$1,730</b>

### Health

Alzheimers Disease & Related Disorders	
American Cancer Society	
Asperger's Association of New England	
Gundersen Lutheran Medical Foundation	
Mayo Foundation	
Sauer Memorial Home	
Saint Anne Foundation	
St. Charles Area Hospice	
Winona Health Foundation	
<b>Donor Advised Health Grants Total</b>	<b>\$63,910</b>

### Human Service

American Red Cross-Winona County Chapter	
Big Brothers/Big Sisters	
Birthright	
Bluff County Family Resources	
Boys Scouts of America	
Catholic Charities-Winona Diocese	
Catholic Relief Services	
Channel One, Inc.	
D.O.V.E. Fund	
Family and Children's Center	
Fillmore Family Resources, Inc.	
Food for the Poor, Inc.	
Girls Scouts MN & WI River Valleys	
Goodfellows Fund	
Habitat For Humanity	
Home and Community Options	
Lakeland Hospice and Home Care	
New Hope Village	
Reece's Rainbow	

Rock Solid Youth Center	
Rotary Foundation	
The Salvation Army	
SEMCAAC	
Southeast Minnesota Rural Education&Resource Ctr	
St. Elizabeth's Community Development Foundation	
United Way of Greater Winona Area	
United Way of Otter Tail County	
Winona County DAC	
Winona ORC Industries, Inc.	
Winona Volunteer Services	
Women's Resource Center of Winona	
<b>Human Service Grants Total</b>	<b>\$262,806</b>

### Religious

Brother Benno Foundation	
Cathedral of the Sacred Heart	
Diocese of Winona	
Diocese of Winona Foundation	
Goodview Trinity Lutheran Church	
Hermits of St. Mary of Carmel	
Immaculate Heart of Mary Seminary	
Our Lady Help of Christians Parish	
Redeemer Lutheran Church	
Sojourners	
St. Bernard Church	
St. Mary's Catholic Church	
St. Stanislaus Church	
St. Matthe's Ev. Lutheran School	
<b>Religious Grants Total</b>	<b>\$55,950</b>

### Other

Minnesota Elks Youth Camp	
Shelter Box USA	
Winona Area Humane Society	
Transfers to WCF General Fund	
<b>Other Grants Total</b>	<b>\$9,496</b>

2010 Advised Grants Total

**\$984,071**



*One vision. Many paths.*

# 2010 COMMUNITY GENERAL FUND GRANTS

The Winona Community Foundation Board makes grants from our General Fund in various ways throughout the year. This Community granting is done through a competitive process with awards going to area non-profit organizations for projects meeting community needs. Applications are reviewed based on established criteria, by our volunteer Grants Committee. Other granting from this pool of assets (General Fund) is through our Winona Fund, which awards modest grants responding to current community unforeseen needs that may not fit within the competitive granting process. In 2010 Youth in Philanthropy grants were also awarded from the General Fund.

79%.....	Human Services
12%.....	Health
7%.....	Education
2%.....	Religion



## 2010 WINONA FUND AND YOUTH IN PHILANTHOPY (YIP) GRANTS

### Health

Winona Health Foundation  
**Winona Fund and YiP Health Grants Total \$164**

### Education

Winona County-Ready Set School  
 Winona Area Public Schools  
**Winona Fund and YiP Education Grants Total \$436**

### Human Service

Big Brothers/Big Sisters  
 Home and Community Options  
 Habitat for Humanity  
 Winona County DAC  
**Winona Fund and YiP Human Service Grants Total \$1,444**

### Civic

Winona County Historical Society  
**Winona Fund and YiP Civic Grants Total \$100**

### Other

Emergency Response Team  
**Winona Fund and YiP Other Grants Total \$456**

2010 Winona Fund and  
 YIP Grants Total  
**\$2,600**

### Education

Winona Area Public Schools  
**General Fund Education Grants Total \$2,940**

### Health

Hiawatha Valley Mental Health Center  
**General Fund Health Grants Total \$5,000**

### Human Service

Big Brothers/Big Sisters  
 Home and Community Options  
 Project FINE  
 Semcac  
 Winona Volunteer Services  
 Womens Resource Center  
 Winona County DAC  
 Winona ORC Industries, Inc  
**General Human Service Grants Total \$32,000**

### Religion

Central Lutheran Church  
**General Fund Religion Grants Total \$1,000**

2010 Community General  
 Fund Grants Total  
**\$40,940**

# 2010 FOUNDERS FUND AWARD

The Winona Community Foundation Board of Directors and Staff are excited to announce the Winona Hims as the 2010 Founders Award recipient.

This Award recognizes individuals & groups who:

- have demonstrated an extraordinary commitment to improving life in the Winona area community through the use of their time, talent and treasure;
- have recognized unmet needs and untapped opportunities to better our community;
- have collaborated with others to create a vision of what could be, then motivated others within the community to take action towards pursuit of that vision;
- serve as role models for others related to charitable activities & community projects;
- advance philanthropic activities in the Winona area community.

The recipients have the privilege to grant the \$2000 award to the charity of their choice, or split between charities they may choose in their name. Congratulations and thank you, for your community spirit, involvement and philanthropy. To read more about The Hims visit [www.winonahims.org](http://www.winonahims.org)



*Donna Helble announces Home and Community Options as the recipient of the \$4000 People's Choice Grant Award.*

## FOUNDATION NIGHT 2010

The Winona Community Foundation celebrated Foundation Night on April 16th, 2010 with a gala event at the Visions Event Center. Attendees and supporters voted on their RSVP cards for the recipients of the People's Choice Grant Awards. Donated by Winona Radio, Winona Volunteer Services was granted \$5,000; an anonymous donor contributed \$4,000 which was granted to Home and Community Options; HBCL donated \$2,000 which was granted to Big Brothers/Big Sisters; and Winona National Bank contributed \$1,000 which was granted to The Feast, Central Lutheran Church. \$12,000 was donated and granted that night!

The evening was also an opportunity to thank the Winona area community for their generosity in supporting the many deserving nonprofits and the people who benefit from their services.



*One vision. Many paths.*

# PLANNED GIVING

Everyone should have an estate plan to ensure that their hard-earned assets reach loved ones and organizations held dear. Part of planning your estate intelligently may include maximizing the taxes you save by increasing the dollars you give. Proper estate planning could reduce or potentially eliminate estate taxes through planned giving, unless of course, the government falls into the category of organizations you would like to give to.

If your estate is quite large and contains highly appreciated property it may be possible to gift to charity while passing more to your heirs than otherwise would be possible without the charitable gift.

Giving strategies may span the range from simple to very complex. They may include giving during one's lifetime, by bequest, or both. This article will focus on giving after death.

## PLANNED GIVING - WHAT IS IT?

A "planned gift" is a gift that will be distributed at some point in the future. The easiest way to make a planned gift is by designating the charitable organization as a beneficiary in your Last Will and Testament or in your Trust. The charitable organization can also be named as a beneficiary of a life insurance policy, annuity contract, and retirement account.

### *Avoid Taxes!*

Making a charity the beneficiary of your IRA, 401(k) or other qualified plan allows you to escape income and estate tax levied on these plans on the Federal and State levels. This means that, in most situations, your donation is worth more to the charity than to your heirs.

### *Be Smart.*

Typically it is smart to give the most-taxed asset in your estate to charity and leave the more favorably taxed property to your heirs. Making a planned gift assures that when you are gone your resources will keep giving to the future of that charity.

### *Current Limits.*

The 2011 Estate Tax Exemptions are \$1,000,000 in Minnesota and (currently) unlimited Federally. This means that you can pass \$1,000,000 Estate tax free to the person or place of your choosing.

Effective estate planning usually takes time, effort and a good attorney. Proper planning allows your family to avoid the delay, dissension and needless expense that often occurs when a loved one dies intestate. Also, I recommend that you talk with your family about what your intentions are and why you made the choices you have made thereby potentially minimizing disputes and/or disappointment after you pass.

*Editors Note: Special thanks to Jennifer Knapp for providing the above information*

# WISE GIVING THROUGH THE EYES OF CHILDREN

*Youth in Philanthropy...nature versus nurture...expanding the work of your Winona Community Foundation*

Winona Community Foundation (WCF) believes nature can be nurtured through our program, Youth in Philanthropy (YiP)! At this time it is a small but growing program that goes into the classroom and provides real-life experiences on the realities of need and the benefits of giving.

In 2010, Matt Smith's 7th and 8th grade classes were the evaluators of applications for the YiP Grant Awards. Each class was introduced to how a community foundation operates by supporting the needs in their areas. They learned how to evaluate an application by using a scoring system based on focus, need, collaboration, sustainability, and the ability to provide matching funds.



The students had nine applications from non-profits in Winona with requests for over eleven thousand dollars. Small groups were created to use the scoring system; next they came together as a class to submit their reconditions to all 7th & 8th grade classes; and finally, they had to agree on who would receive the funding and at what level. The hardest problem the students had to face was working with only two thousand dollars when they knew it wasn't enough to help meet real needs.

In addition to providing YiP, we support philanthropy at other levels through advised funds, fiscal sponsors, agencies and countless other ways. It was once said "The great thing about community foundations is they can be something to everyone, and the bad thing is they can be something to everyone," Author unknown. We are a small office but we meet our challenges by working together to improve this community and the people who live here.

To learn more on how you can be involved in expanding the YiP program please contact the Foundation office.

## ***Founders Fund***

The Founders Fund was created to honor all of the individuals who planted the seed for the start of Winona Community Foundation in the 1980's. This endowed fund awards dollars to a local non-profit chosen in the name of an individual who has clearly touched community life for all time. Past recipients of this award include:

**Louis De Thomasis, Saint Mary's University**  
president

**Dr. Darrell Krueger, Winona State University**  
president

**Ms. Gloria Ames, Community volunteer**

**Tim Burchill, Development program at**  
Saint Mary's University of Minnesota

**Sue Cornwell, Community Leader and first**  
president of WCF

## ***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 or 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.**

# COMMUNITY GENERAL FUND DONORS

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

## *General Donors*

The General Fund is the resource from which grants are allocated to organizations in the Winona Community Foundation area.

Kim & Mike Allen  
Tina & Mark Anderson  
Muriel & Dave Arnold  
Chris Arnold and Stacey  
Mounce Arnold, DDS  
Jeni & Dan Arnold  
Jan and Paul Brosnahan  
Jane & Robert Bartz  
Denise & Michael Bernatz  
Ann & Steve Blue  
Nancy & James Brown  
Sandra & Brian Burke  
Mary Burrichter & Robert  
Kierlin  
Gerry Cichanowski  
Linda & Mike Cichanowski  
Charlotte Clark  
Gayla Clemons  
Karen & Dennis Cleveland  
Sue & Jack Cornwell  
Cindy and Andy Davis  
Judy & Bill Davis MD  
Laura & Chuck Eddy  
Susan & John Eddy  
James and Mary Eddy  
Karen & O.J. Fawcett  
Laura & Raymond  
Feller III  
Jennie & Dan Florness  
Gayle Goetzman  
Joette & Michael Gostomski  
Wyatt Hammell  
Mike & Sue Hauser  
Donna Helble  
Ann & Brian Junker  
Wendy & John Killen  
Jennifer Knapp  
Darlene & Peter Kuklinski  
Ann Lavine & Kevin Possin

Deb & Robert Leaf  
Beverly and Richard Lindseth  
Laurie Lucas  
Jackie & Dave Mahlke  
Cecilia & Gabriel Manrique  
Leone & Thomas Mauszycki  
Kathryn & Dennis McGuire  
Dorothy McGuire  
Joan & Bill McNeil MD  
Vera & Hugh Miller  
Janel & Jeremy Miller  
Susan & Jerry Miller  
Sheryl Miller  
Marlene & John Mulrooney MD  
Rod and Nancy Nelson  
Karen and Bud Nystrom  
Arvie & Corwin Osterloh  
Pat & Jerry Papenfuss  
Gabrielle & Brad Peterson  
Arlene & JC Pfeiffer  
Judy & Jack Richter  
Susan & Pete Roehl  
Pat & Dan Rukavina  
Fatima and Abdel Said  
Marilyn Schwab  
Julianne & Cullen  
Schwemer MD  
Judy & Charles Shepard MD  
Gloria Siewert  
Barbara & Stephen Slaggie  
Lonna & Dennis Theede  
Dan and Shelley Trainor  
Kathy & Scott Turner MD  
Caer & John Vitek  
Mary & William Wiczorek  
Debra Wildenborg  
Barb and Tom Wynn

## *Businesses*

City of Winona  
Dahl Automotive  
HBCI – Hiawatha Broadband  
Communications  
HyVee  
Merchants Bank  
Miller Felpax  
RTP  
St. Marys University  
Vision Design  
W & C Printing  
Winona Daily News  
Winona Golf & Dining  
Winona National Bank  
Winona Post  
Winona Radio

## *Foundations/Other*

Delta Sigma Pi Kappa Upsilon  
Venables Foundation  
Winona Elks

## *Donor Advised Funds To General Fund*

Karen and Dennis Cleveland  
Papenfuss Family Fund

## *Pfeiffer Land Fund*

Arlene and JC Pfeiffer

## *Thomas H. Laken Administrative Endowment*

Mark and Tina Anderson  
Jane and Bob Bartz  
Barb Burchill  
Michael Bernatz  
Mary Burrichter and Robert  
Kierlin

Jack and Sue Cornwell  
Dennis Decker  
James and Mary Eddy  
OJ Fawcett  
Fred Fletcher  
Raymond Feller III  
Phil Feiten  
Michael Hauser  
Thom and Robyn Kieffer  
Laurie Lucas  
Thomas and Leone Mauszycki  
Hugh Miller  
Alan Nelson  
Carol Orłowski  
Patricia Peterson  
Charles Shepard, MD  
Slaggie Family Foundation  
Jerry Whetstone

## *In Memory Of*

***Craig Nelson***  
Alan and Carole Nelson

***Judge Duane Peterson***  
Patricia Peterson

***H.T & Edna Mae  
Cleveland***  
Karen & Dennis Cleveland

***Paul Roney***  
Karen & Dennis Cleveland

***Brianna Vitek***  
Caer & John Vitek

## *In Honor Of*

***Doris Vculek***  
Karen & Dennis Cleveland

***Donna Helble Birthday***  
Mr. and Mrs. Andrew Modjeski  
WCF Staff

***Jacqueline Mahlke***  
George Hroch

***Birthday of  
Dan Florness***  
Mary Burrichter and Robert  
Kierlin

## PLANTING SEEDS FOR THE FUTURE

This year we will plant a seed; it is the newest tool in our tool belt of philanthropy. These Seed Funds offers individuals and charities an option to build charitable assets over several years. Rather than requiring \$5,000 immediately to begin a fund, Seed fund holders agree to a minimum initial contribution of \$500 to build their Seed. Once \$5,000 is accumulated via gifts and interest, the Seed Fund matures to a regular fund from which the donor can advise annual distributions. These Seed Funds will be an avenue for everyone to get involved in the Winona Community Foundation.

Donors interested in beginning such a fund will meet with the WCF staff to review specific details, which will then go to the Foundation's Board for approval prior to and beginning the fund.

### A FLEXIBLE WAY TO GIVE

Starting a Seed Fund can be an individual or family endeavor. The paperwork is quick and easy.

- Gifts to an Seed Fund account can be made using cash, credit card, stocks or mutual funds
- A minimum of \$500 is required to open an Seed Fund
- A minimum annual contribution commitment of at least \$250 is requested, \$500 suggested, until the fund reaches \$5000, with the target of reaching this ten (10) years from the date of opening the Seed Fund
- Gifts are tax-deductible
- Once the \$5,000 mark is reached, the fund may be endowed or a noted as a pass-through fund that can operate as one of several different types such as donor advised, designated, field of interest or scholarship fund. The possibilities are limitless!

Minimal fees are charged while the fund grows (currently \$25 a year) and the normal start-up fee is waived when the fund reaches full size of \$5000 for being a component fund of the Foundation

The Foundation staff will be happy to discuss this fund with anyone that is interested. It is the easiest way to start you on your way to being a Philanthropist.

## *Top Ten Reasons to Join the Winona Community Foundation*

- Maximize tax benefits
- Preserve financial assets to support your community
- Invest in the future of your passion
- Make your wishes known, plan your legacy
- Demonstrate your philanthropy and be part of the solution by creating long-lasting, positive change
- Ensure that the Winona Community Foundation has a secure basis of funding in the years ahead
- Boost your effectiveness with access to resources and tools in line with philanthropy
- You want to join a group of Friends of the Foundation that share your passion of philanthropy
- You want to honor a loved one by making a gift in his or her name
- You want to give now and don't know where to start



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FOUNDATION

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