



*Celebrating 10 Years of Helping You Share*  
2005 Annual Report

# Celebrating 10 Years

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Cover: Many thanks to nationally recognized artist Mary Pettis, Taylors Falls, MN, for permission to use her painting, "Across the River", on this year's annual report cover. Her work is available locally at the Up North Fine Art Gallery in Lindstrom, MN and on her website at: [www.marypettis.com](http://www.marypettis.com)

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## Our mission

The Mission of the St. Croix Valley Community Foundation is to enhance the quality of life in the St. Croix Valley by:

*Encouraging* charitable giving in the valley.

Building permanent funds that will provide resources for the needs of today and tomorrow.

*Connecting* people and programs. Bringing together people's charitable interests and the funding needs of programs and organizations.

*Facilitating* progressive approaches. Forming partnerships and providing servant leadership through programs that enhance the quality of life in our region's distinct communities.

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# of Helping You Share

## Letter from the Board Chair and President

This year was one of notable achievements for the Foundation. Grants from funds at the foundation and support for fiscal sponsorships passed the \$1 million mark. Over 350 staff and board members of local nonprofit organizations attended workshops sponsored by the Community Partnerships Initiative during this vital program's first full year. These skill building programs and grants are designed to help strengthen nonprofits' capacities to carry out their missions. Conversations of the Valley completed a second, highly popular season of monthly public affairs programs. Public forums and programs presented with the Phipps Center for the Arts and University of Wisconsin-River Falls explored possible solutions for preserving community character. Affiliated community funds and funds associated with them (created by families and businesses) passed the \$1 million mark in new charitable investments in those 7 communities. Our assets increased by 20% as we closed the fiscal year at nearly \$7.5 million.

The true impact of these numbers is measured by the growing presence of social capital in our region's towns and cities. Are we putting our charitable financial assets to work helping social capital flourish through cooperation, collaboration, partnerships and the funding of programs that benefit our citizens? We believe that is the case.

During an epoch when our region is undergoing unprecedented growth and many worry about the retreat of people into cocoons, we see people contributing their time and resources to the many nonprofit organizations that are such a key part of the fabric of our communities. Businesses, our United Ways and private foundations have joined the efforts to strengthen nonprofits by co-sponsoring the Community Partnership Initiative. At the foundation we are keenly interested in the character of our historic communities and have welcomed opportunities to collaborate with the University of Wisconsin – River Falls, the Phipps Center for the Arts, service clubs and others to explore and support aspects of community and civic life. And above all, we embrace the opportunity to help people give back to their communities, a few of whom are profiled in this annual report.

Our challenges are matched by our opportunities, and we look forward to an even fuller engagement as the community foundation of the St. Croix Valley begins its second decade of service to the region.

Peter H. Kilde, chair

David H. Griffith, president



Peter H. Kilde  
Chair, Board of Directors



David H. Griffith  
President

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# Celebrating 10 Years

## Board of Directors July 2004 to June 2005

Charles Arnason, Marine, MN

John Baird, Stillwater, MN

James Bradshaw, Stillwater, MN

William Campbell, River Falls, WI

John Coughlin, New Richmond, WI

Karen Hansen, Stillwater, MN

Nate Jackson, River Falls, WI

Michael Johnson, Stillwater, MN

Peter Kilde, Glenwood City, WI,  
*Board Chair*

Barbara Klemme, Stillwater, MN

Rita Lawson, Somerset, WI

Marilyn McCarty, New Richmond, WI

Erv Neff, Stillwater, MN

Lynn Shafer, Stillwater, MN

Heidi Smith Erspamer, Amery, WI

Gretchen Stein, Osceola, WI

John Tunheim, Stillwater, MN

Dan Willius, Scandia, MN

### Former SCVCF Board Members

Sarah Andersen, Lurline Baker-Kent,

David Brandt, Kathleen Doar, Lou

Fuller (deceased), Molly Gale-Wyrick,

C. R. Hackworthy, Jim Hanks, George Hauser,

Rod Hofland, Orv Johnson, Daniel Lien,

Dan McGuinness, JC Pfeiffer, Thomas

Scheurman (deceased), Lawrence Severson

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## 10 Years of Helping You Share

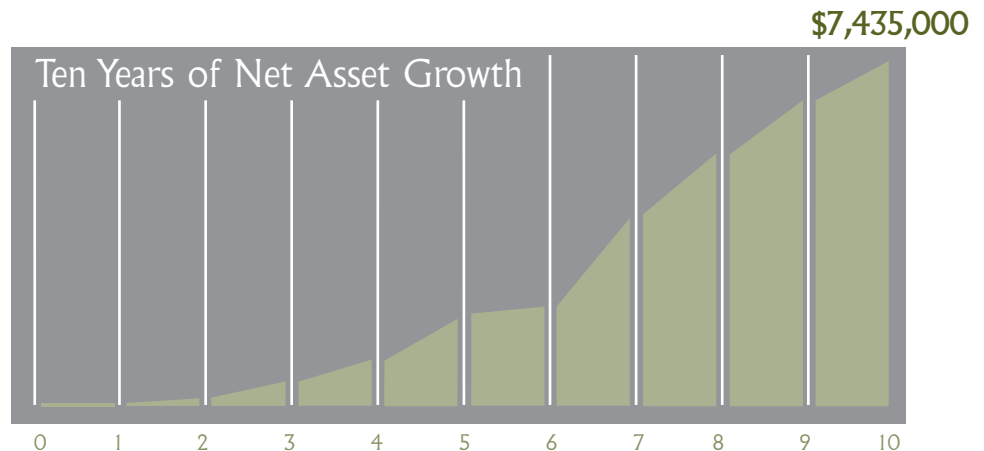
Ten Years Old! The St. Croix Valley Community Foundation is celebrating ten years of growth and service to the St. Croix Valley's five counties of Washington, Chisago, Polk, St. Croix and Pierce. We are young, yet we are strong, thanks to the support of many!

It has been ten years since the vision of our founders helped residents create their own Community Foundation in the valley.

In just ten years your Foundation has received \$11,878,300 in total donations. Every gift, large and small, adds to our ability to serve the area. Over 1,228 grants totaling more than \$3,665,370 have been distributed, and assets under management grew to \$7,435,000 in 2005.

But we're about a whole lot more than numbers. We are about people — people engaged in doing something for others. We have worked with hundreds of donors and grantees, who are the reasons for your Community Foundation's success.

A gift to the St. Croix Valley Community Foundation is a gift of hope, promise and confidence. It is a gift of permanence. Our vision for the future includes more of the same: Helping You Share your gifts.



## SCVCF Management

The Foundation is governed by a Board of Directors who live and work or have their roots in the region where the Foundation focuses its efforts—the counties of Polk, St. Croix and Pierce in Wisconsin and Washington and Chisago in Minnesota. It's assets are managed by the Foundation's Investment Committee, composed of Board members and other professionals with expertise in the legal, financial and public accounting fields, along with the investment advisor from First State Bank and Trust of Bayport, MN.

# of Helping You Share

## Founders' Society

Building a community foundation is a long-term venture. Since its founding in 1995, a number of individuals, businesses and private foundations have provided program and operating support to SCVCF. We are pleased to recognize those who have contributed and pledged \$5,000 or more to further the mission of the Foundation during its formative years. Please contact us for further information on becoming a member of the Founders' Society. The following list includes all members through June 30, 2005.

Fred C. & Katherine B.  
Andersen Foundation  
Hugh J. Andersen Foundation  
Sarah Andersen  
Anonymous Donors  
John & Nancy Baird  
Bayport Foundation of  
Andersen Corporation  
James & Jayne Bradshaw  
David & Sandy Brandt  
Otto Bremer Foundation  
Loren & Ruby Croone  
The Dietz Family Fund of  
the St. Paul Foundation  
Kathleen Doar & Alan Sinaiko  
First National Bank of Hudson  
James & Mary Gillespie  
David & Katherine Griffith  
C.R. & Cynthia Hackworthy II  
Karen & Craig Hansen  
Gerald & Yvonne Hoel

Jack & Joyce Hooley  
Lawrence & Kay Horsch  
Hudson Community Fund  
Michael & Jan Johnson  
Orville & Kathleen Johnson  
Joyful Women Fund  
Rita & Bill Lawson  
MAHADH Fund of HRK  
Foundation  
McKnight Foundation  
Margaret Rivers Fund  
St. Croix Foundation  
S & C Bank  
Tozer Foundation  
John & Kathryn Tunheim  
William Voedisch &  
Laurie Carlson  
Archie & Bertha Walker  
Foundation  
Wisconsin Arts Board

## 10 Reasons People Choose to Give Through Community Foundations

- 1 We are a local organization with deep roots in the community.
- 2 Our professional program staff has broad expertise regarding community issues and needs.
- 3 We provide highly personalized service tailored to each individual's charitable and financial interests.
- 4 Our Donor Advised Funds help people invest in the causes they care about most.
- 5 We accept a wide variety of assets and can facilitate even the most complex forms of giving.
- 6 We partner with professional advisors to create highly effective approaches to charitable giving.
- 7 We offer maximum tax advantages under state and federal law.
- 8 We multiply the impact of gift dollars by pooling them with other gifts and grants.
- 9 We build endowment funds that benefit the community forever and help create personal legacies.
- 10 We are a community leader, convening agencies and coordinating resources to create positive change.

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*Celebrating 10 years of Helping You Share/5*

# Inspired Giving

At the St. Croix Valley Community Foundation our purpose is to help you give to the issues or organizations you are most committed to—whether it is vital support for immediate needs or by creating a legacy for future generations.

Like you, other donors who give to the foundation share one important value—they care. Some want to determine which nonprofits will benefit from their fund. Others look to the foundation for personalized assistance in identifying specific agencies that address the causes they care most about.

## St. Croix Valley Community Foundation Funds

The following funds support the programs and grant-making of the SCVCF:

**Unrestricted Endowment Fund** – Donations provide the directors of the foundation with the flexibility to respond to the changing needs of the community over time. The funds are entrusted to the board to use the Foundation’s knowledge of the community when investing in programs and responding to opportunities for philanthropic support.

**Administrative Endowment Fund** – Earnings from this fund support Foundation operations, the professional staff and programs. As the Foundation’s ongoing source of operating capital, a strong administrative endowment keeps fees low while providing perpetual support for operations.

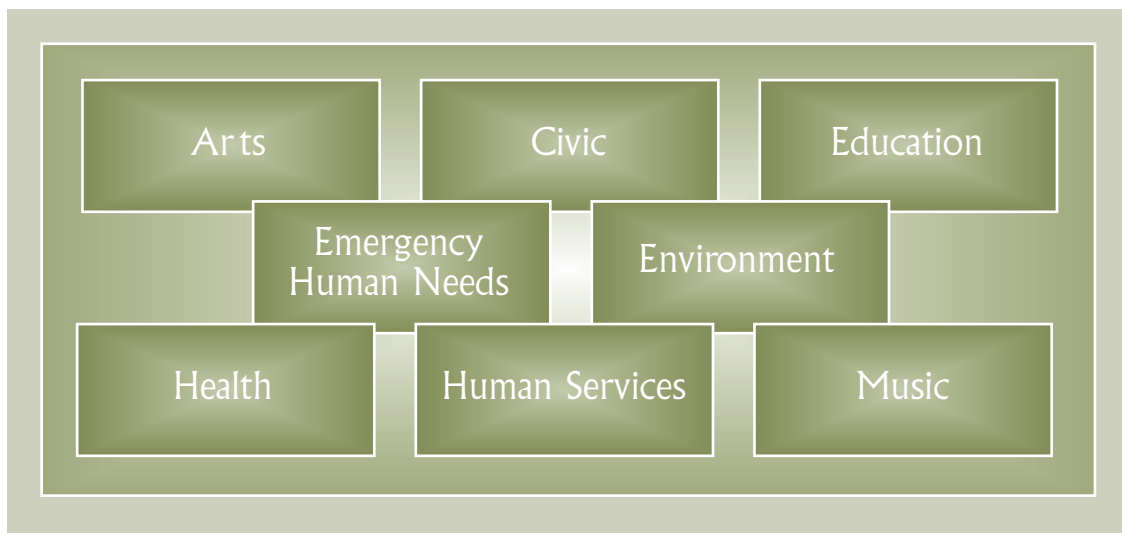
**Board Fund** – enables the Board of Directors to respond to current community needs with modest grants.

**General Operating Fund** – Contributions to this fund represent the single largest source of annual operating support, along with fees and earnings from the Administrative Endowment. With the growth of the Foundation’s assets over time, fees and endowment earnings will cover most of the basic annual operations.

**Field of Interest Funds** – These funds provide donors an opportunity to contribute to an area of interest without specifying a particular charity or organization. The Foundation’s directors award grants from these funds to support appropriate projects within that prescribed field of interest.

Please consider giving a gift to any of these funds:

### Fields of Interest Funds



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## A Gift to Minnesota Parks & Trails

*On a balmy summer afternoon you can find Don Anderson at William O'Brien State Park monitoring one of over 200 Bluebird nesting boxes, assisting a family at one of the campsites, or taking a walk on one of the trails meandering through native prairie grasses and wild flowers.*

*The Park has long held a special place in Don's heart. Anderson, who is from Grantsburg, Wisconsin, spent many summers camping at O'Brien with his wife. In the 1990's he served as a member of the Park's advisory council, and later he helped establish Friends of O'Brien, a group of about 35 volunteers who contribute many hours of their time to support the work and activities of O'Brien.*

*Up until the last few years, when Don wasn't at the park, you could find him at Andersen Windows where he worked as a quality control analyst for 33 years. When he retired*

*in 1999, he began looking for a way to do something more for O'Brien. He discovered an Andersen Windows stock options program that the St. Croix Valley Community Foundation had helped put in place just a few months before. The arrangement between Andersen Windows and the Foundation gave Don the opportunity to make a substantial gift to William O'Brien State Park through the Parks & Trails Council of Minnesota. With this option he was able to receive a full tax deduction for the amount donated rather than pay a sizeable capital gains tax on stock dividends that had accumulated over the years.*

*Dorian Grilley, Executive Director of the Parks & Trail Council, said that Anderson's gift has been deposited in the Council's Land Acquisition Fund & will be used to purchase additional acreage for William O'Brien when the land eventually comes up for sale. Land acquisition is important to*

*the parks for several reasons. "The parks are designed to reserve a little part of the natural landscape of Minnesota," explains Grilley, "and to do that, you need a critical mass to preserve a functioning ecosystem. In addition, William O'Brien is a popular and heavily used park and at times its resources are heavily stretched. Additional land acquisition will provide more recreational, resource management, and interpretation opportunities for William O'Brien."*

*"Don's quiet commitment to the future of William O'Brien and our state park system is a wonderful example and inspiration for others working hard to support Minnesota's State Parks," says Grilley. Don Anderson's gift to the Parks is just one illustration of the St. Croix Valley Community Foundation's belief that everyone can be a philanthropist, helping to enhance the quality of life in the St. Croix Valley.*

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## Donor Advised Funds benefit the charitable interests of the donors.

*Don Anderson Family Fund* \*\*\*  
*Paul L. Anderson Fund*  
*Paul L. Anderson Short Term Fund*  
*Charles & Peggy Arnason Fund*  
*Baird Family Fund* \*\*\*  
*Jon & Metta Belisle Donor Advised Endowment Fund*  
*Bradshaw Celebration of Life Endowed Fund*  
*Bradshaw Celebration of Life Fund*  
*Jim & Jayne Bradshaw Family Fund*  
*David & Sandy Brandt Short-term Fund*  
*David & Sandy Brandt Family Fund*  
*John & Mary Cameron Fund* \*\*\*  
*Loren & Ruby Croone Fund*  
*Ezekiel Lutheran Church LACE Fund*  
*Forest Lake Rotary Schumacher Field Fund*  
*Mark and Maeta Gherty Family Fund*  
*C.R Hackworthy II Family Fund*  
*Janet M. Hansen Fund* \*\*\*  
*Karen Ciegler Hansen & Craig J. Hansen Family Fund*  
*Heiser Family Fund*  
*Glen O. & Elizabeth I. Helmen Mem. Fund* \*\*\*  
*Allison Helmen Memorial Fund*  
*Gerald & Yvonne Hoel Fund*  
*Gerald & Yvonne Hoel Family Fund* \*\*\*  
*HomeShare St. Croix Fund* \*\*\*  
*Hudson Physicians Fund* \*\*\*  
*Jack & Joyce Hooley Endowment Fund*  
*Jack & Joyce Hooley Fund*  
*Hudson Daybreak Rotary Long Term Fund*  
*Nate & Linda Jackson Future Fund*

*Nate & Linda Jackson Fund*  
*Michael O. Johnson Short Term Fund*  
*Orville & Kathleen Johnson Family Fund*  
*Orville & Kathy Johnson Short-Term Fund*  
*Ingrid & Marie Kilde Fund*  
*The Kren Fund* \*\*\*  
*Krueger Family Fund* \*\*\*  
*Kathleen Lindahl Fund*  
*Tim Linehan Memorial Fund* \*\*\*  
*Margaret B. Mattlin Fund*  
*Allen & Corinne Metcalf Fund*  
*G. and J. Museus Family Fund*  
*George and Dorothy Nelson Fund*  
*O'Connell/Ellison Crime Reward Fund*  
*Physicians' Fund*  
*Keith & Jody Radtke Fund*  
*Rotary District 5960 Foundation-Cambridge*  
*Rotary District 5960 Foundation-Hudson*  
*Sandy Hills Fund*  
*Thomas J. Scheuerman Youth Fund* \*\*\*  
*Thomas J. Scheuerman Memorial Fund*  
*Dean and Lynn Shafer Fund*  
*Simonet Family Fund*  
*Stine Donor Advised Fund* \*\*\*  
*Stillwater Sunrise Rotary Charity Fund*  
*Tom & Suki Thomsen Donor Advised Fund*  
*Kevin & Rita Vance Current Fund*  
*Kevin & Rita Vance Family Fund*  
*Ronald & Susan Weiler Family Fund*  
*White Pine Fund*

## Donor Designated Funds

benefit specific charitable organizations or named projects.

*Jonathan Patrick Erspamer Fund*  
Benefits children in the region with special needs

*Friends of Perch Lake Fund*  
Is for the development of Homestead Parklands on Perch Lake in St. Croix County

*Charlotte K. Kirby Fund*  
Supports the Humane Society for Companion Animals in Woodbury, MN

*LADDA Long Term Activities Fund*  
Supports bowling, dances and other activities for special needs adults

*LADDA Endowed Fund*  
Supports the long term care of special needs adults

*Lake St Croix Beach Community Playground Fund* \*\*\*  
Supports the design and construction of playground equipment

*Lifeline Fund*  
Supports emergency human needs in the region

*Memorial to Veterans of Stillwater Area High School Fund*  
Supports design and construction of the memorial

*Dan O'Connell Peace Garden Fund*  
Supports design, construction and maintenance of the memorial garden

*Peace House Fund*  
Supports the renovation of a house in Stillwater to be used for transitional housing

*Nelle Johnson Potts Fund*  
Benefits Young Life in Stillwater and White Bear Lake, MN

*Riverway Park Partnership Fund*  
Supports the renovation of Veterans Park in River Falls, WI

*SAHS On Campus Stadium Fund*  
Supports the construction of the stadium on the campus of the Stillwater Area High School

### CONNECTING PEOPLE & PROGRAMS

The Foundation connects donors and programs in two different ways. We provide personalized assistance or arrange site visits to help donors identify organizations that address the causes they care most about.

The Foundation also screens proposals from local nonprofit organizations and shares this information with interested donors giving them an opportunity to learn about specific requests that match their interests. This process also alerts donors of grant making opportunities they might not have been aware of. Please contact the foundation if you are interested in receiving this list of granting opportunities.

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\*\*\*New funds established this fiscal year



# A "LADDA" Fun

*It's 6:15 pm on a Friday night at the Eagles Club & people are lined up outside waiting for the dance to begin. The doors won't open for another 45 minutes, but these evenings have become so popular the crowd is starting to outgrow the facility. And so they wait, to make sure they'll get in and have a chance to share in the fun.*

*When the doors open at last, the music starts & the dance floor quickly fills. But this is no ordinary dance. And these are no ordinary young people. They are unique individuals, all with developmental disabilities, who have been given a special opportunity to enjoy an evening of music and entertainment together with family members and friends.*



Wayne Richert, Brian Schneider, Paul Belair, Joel Loer



Shelly Chandler, Connie Borson, Nancy Wallen, Jane Parent

*Living with a developmental disability can be an isolating experience. But these young adults are fortunate. Five years ago, a group of enterprising parents from Stillwater and Lake Elmo joined together in an effort to make sure their sons and daughters had a chance to have as full a social life as possible. The result was LADDA, Leisure Activities for Developmentally Disabled Adults. In addition to the dances, which are held four times a year, LADDA provides scholarships to individuals with special needs to attend summer camps such as Friendship Ventures, Off the Beaten Path, and Wilderness Inquiry trips. LADDA also sponsors a bowling league that meets every other Saturday from September to April.*

*Joan Loer, the bowling league coordinator and a member of LADDA's advisory committee, said the organization was fortunate to have formed a relationship early on with the St. Croix Valley Community Foundation. The Foundation handles the financial and legal paperwork for the organization and is the vehicle through which individuals and community organizations, such as the Eagles Club and Knights of Columbus, can make their tax-deductible gifts to the program. The LADDA Activities Fund & the LADDA Endowment Fund, which were established with the assistance of experienced Foundation staff, will help to ensure that the dances on Friday nights and bowling on Saturdays will continue for years to come.*

## Agency Funds

enable an organization to establish its own long-term endowment fund at the Foundation. The Foundation handles the investment and management of the assets, distributing the earnings to the agency.

Community Volunteer Services Fund

Courage St. Croix Fund

Croixdale Mission Benevolence Fund

Ezekiel Lutheran Church Fund

FamilyMeans Facilities Fund

FamilyMeans Fund

HSI Endowment Fund

Land Stewardship Project Fund

Lucy Winton Bell Athletic Fields

Northern Star Boy Scout Fund \*\*\*

Partnership Plan Endowment for Excellence

Partnership Plan Futures Fund

Ruth Geary Arts Fund \*\*\*

Dr. Tom F. Linde Fund \*\*\*

Lundquist Endowment for the Sciences \*\*\*

Orchestra Legacy Fund

Weingarten "What's Best For Kids" Fund

Pierce County Historical Association Fund

Somerset Public Library Endowment Fund

St. Croix Area United Way Endowment Fund

Standing Cedars Endowment Fund

Stillwater Public Library Athena Fund

United Way of St. Croix County

Long-Term Fund

Valley Senior Services Alliance Fund

Washington County Historical Society's Fund

West CAP Endowment Fund

Youth Service Bureau

\*\*\*New funds established this fiscal year

## SCVCF

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# Affiliated Community Funds help benefit their communities for generations to come.

These communities use their funds to make grants for local ballparks, beautification projects or human service needs. On June 30, 2005, seven Affiliated Community Funds and their related Scholarship, Donor Advised, and Donor Designated Funds totaled \$1,066,769.00.

Please contact the Board Chair of your community fund for more information.

<i>Amery Community Foundation Fund</i>	Lou Williamson	715-268-9149
<i>Baldwin Area Community Foundation Fund</i>	Claire Stein	715-684-3290
<i>Dresser Area Community Fund</i>	David Griffith	715-386-9490
<i>Hudson Community Fund</i>	Susan Gilbert	715-386-5511
<i>New Richmond Community Fund</i>	James Craig	715-246-3999
<i>Prescott Community Fund</i>	Neil Durhman	715-262-3806
<i>River Falls Community Fund</i>	Linda Jacobson	715-425-3190
<i>Stillwater and Other Communities</i>	David Griffith	715-386-9490

## Riverway Park Renewed & Revitalized

Riverway Park in River Falls, Wisconsin had fallen into disrepair. The park had been situated on Main Street for decades in a beautiful spot right off the Kinnickinnic River. But in recent years it had begun to show its age. Park benches were disintegrating, trees required trimming, and the grounds were in want of fresh landscaping. Seeing the need, a handful of committed River Falls residents formed the Riverway Park Partnership to take on the challenge of renovating the park. In 2001, they put together a volunteer committee, developed a vision and strategy for the renovation project, and then appealed to the River Falls Community Fund, an affiliated fund of the St. Croix Valley Community Foundation, to help manage the tax deductible donations that would be solicited for the project. Tom Garfin, chair of the Steering committee, said that partnering with the River Falls Community Fund was instrumental in making the project a success. The Fund provided the Riverway Park project with the tax-deductible status and fiduciary controls that were needed to inspire confidence in the fundraising side of project. Once that was established, the donations began to flow. What had begun with the efforts of a few grew into a community-wide effort involving the city, service clubs, and area businesses. The project received \$123,000 in cash and pledges and \$80,000 in donations of in-kind plumbing, electrical and contracting services. Today, four years later, the park features newly planted trees, brick walking paths, a tot lot, a performance stage, and a river overlook. Linda Jacobson, chair of the River Falls Community Fund, says this is just one example of the way in which the Fund is able to help people give back to the community they love. Whether it's establishing a memorial, setting up a scholarship fund, or contributing to a major project like the Riverway Park project, Linda and her fellow board members want the residents of River Falls to know that the Community Fund can help individuals who have a passion for their community and a philanthropic spirit reach their goals.



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# Scholarship Funds

*Paul L. Anderson Scholarship Fund* — established December, 2003, awards two scholarships to graduates of Hudson High School entering post secondary education who have participated on the tennis team.

*Anne Cernohous Borchardt Music Scholarship Fund* was established June 2000 to provide scholarships for the study of voice and/or piano for students from the St. Croix River Valley or East Metro area of St. Paul.

*"Coach" Wes Windmiller Memorial Scholarship Fund* was established in April, 2004. The fund awards a scholarship to a senior boy basketball player who is a member of the Stillwater Area High School basketball team.

*Doris Fuka Scholarship Fund* was established July, 1999 to provide scholarships to River Falls High School graduates entering college who have excelled in speech activities.

*Janet Hansen Scholarship Fund* was established June, 2000 to provide college scholarships to River Falls High School graduates entering the field of elementary education.

*Dr. Val Kremser Medical Scholarship Fund* was established December, 1999 to provide a scholarship annually to an Amery High School graduate entering study in a medical field.

*Karl D. Ludvigson Memorial Scholarship Fund* was established December, 1999 to provide scholarships for students graduating from Osceola High School and attending post-secondary education programs.

*James McLaughlin Scholarship Fund*, established in December, 2002, provides scholarships to students at Stillwater Area High School who have been selected by other students as Most Valuable Players in a sport.

*Bradley W. Nordstrand Scholarship Fund* was established June, 2001 to provide scholarships for graduating seniors who participated in the Phipps Center for the Arts Children's Theater Program.

*SCVCF Young Life/Realife Scholarship Fund* - This scholarship is awarded to a Stillwater Area High School graduate attending post-secondary education who has participated in faith-based opportunities.

*St. Croix Valley Harley Owner's Group Scholarship Fund* was established December, 1999 to provide scholarships to high school graduates from Polk, St. Croix and Pierce counties in Wisconsin and Chisago and Washington counties in Minnesota for post secondary education.

## Dr. Val Kremser Medical Scholarship Fund

*In the late 90's, Ethyl Simonstad was searching for a meaningful way to honor her first husband, a general practitioner who served for many years in the community of Amery, Wisconsin. After contacting the St. Croix Valley Community Foundation, Foundation staff helped Ethyl establish the Dr. Val Kremser Medical Scholarship Fund.*

*The scholarship, which is awarded annually, goes to an Amery High School graduate intending to study in the field of medicine. "Val was a very popular doctor," says Ethyl. "Patients would come from many miles away to see him, even though there might be clinics available in their own towns." Unfortunately, he died of a heart attack at the age of 49. "He died so young and was so well-liked," says Ethyl, "that I felt something should be done to perpetuate his name and honor the work he did in the area of medicine."*

*Seven young people have received the scholarship to date. One of the recipients is Ariannah Braatz, a student in child development and social welfare at the University of Wisconsin, Madison. After graduation, Ariannah hopes to work in a hospital setting in child life therapy, a program designed to help kids prepare for surgery by alleviating fears and educating children and parents about new and sometimes frightening surgical procedures.*

\*\*\*New funds established this fiscal year

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# Celebrating 10 Years

*Certified in 2004 for meeting the Council of Foundations National Standards for Community Foundations*

*The Valley Arts Initiative launched in 1998 has resulted in over \$85,000 in arts grants to date.*



*"Celebrate life, create a legacy,  
and make a difference"*  
—Jim Bradshaw

Country Messenger, 1997. (Back row) John Baird, Marty Lawson, Rita Lawson (front row) Brian Simonet, Larry Severson, Bill Lawson, Jerry Beedle and J. C. Pfeiffer helped move office equipment to the new offices of the SCVCF, located in the S & C Bank in Somerset, Wisconsin.



Stillwater Gazette, 1997. John and Nancy Baird, May Township, presented the first check drawn from the SCVCF's donor advised funds to Superintendent David Wettergren for the Partnership Plan for Stillwater Area Schools.



Country Messenger, 1998. Lynn Shafer and St. Croix Valley Community Foundation President Ron Kroese accept a \$100,000 check from HSI Board Member Gary Schmidt and HSI CEO Robert T. Butler.

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# of Helping You Share



April, 1999. Orville Johnson and Chuck Fullmer establish the Valley Senior Service Alliance Fund of the SCVCF.

*The first donor advised grant was made in 1997 to the Partnership Plan of Stillwater School District by John and Nancy Baird.*

*"Every dollar, every dream counts. We all share in shaping the future,"*

*—John Baird from Senior Living Showcase, May, 1998.*

*Since 1997 SCVCF has helped seven communities in the St. Croix Valley establish their own community funds that together passed the \$1 million milestone in 2005.*

*The first agency endowment fund was established by Human Services, Inc.*

*"Many of us want to share, and it's a way to leave a legacy."*

*—David Brandt in St. Paul Pioneer Press, August 1997*

## **Board Chairs to date:**

*John Baird  
Jim Bradshaw  
David Brandt  
Sarah Andersen  
Orv Johnson  
Peter Kilde*



The opening of the new offices in Somerset, WI in the S&C Bank building was celebrated with a cake, as shown by board member Lynn Shafer.

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# Partners in Our Community

## Community Partnership Initiative

In 2005 SCVCF launched our Community Partnership Initiative, and stepped forward to take a more active role in the Valley in partnership with other nonprofits, funders and community leaders. Here are some of the things we have done:

### Strong and Effective Nonprofits



Just as for-profit businesses require a level of reinvestment to grow, nonprofits must also invest in their own development. SCVCF supports this progress by providing training and grants to local nonprofit organizations to help them focus their vision, deal with change or strengthen their operations. In 2004 we received an overwhelming response—over 400 individuals attended workshops to build their skills in fund raising, strategic planning, marketing or board development. And 12 organizations received a total of \$25,000 in grants to enhance their management and leadership. Together this response demonstrates how many nonprofit leaders seek to run effective and responsive organizations.

These workshops are a collaborative endeavor, involving a partnership among local United Ways, UW-Extension and Bremer Bank. And, as a funding partner, the Hugh J. Andersen Foundation has granted an additional \$20,000, extending our reach to an additional 9 nonprofit organizations.



Knowledgeable about community building, Lew Feldstein spoke to SCVCF and affiliated funds Board Members about the role of community foundations as community catalysts.

### Better Together: An Experience of Place

Work, commuting, high-tech communication. These are some of the things that keep us from volunteering or connecting with our neighbors. This topic was the focus of *Experience of Place*, a community forum co-sponsored by SCVCF, The Phipps Center for the Arts and University of Wisconsin River Falls. Lew Feldstein, co-author of *Better Together: Restoring the American Community*, explained how we can revitalize a sense of connection, belonging and community—our social capital—in the face of the rapid growth transforming the cities and small towns in the St. Croix Valley.

In addition, the forum featured over ninety artists who explored what community and place meant to them through performance and visual art. Facilitated by the Phipps, these expressions were the product of several artist conversations funded by SCVCF and the Wisconsin Arts Board.

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## Grants to the Community

### Music Education Fund

A lasting resource to enrich music education programs in St. Croix Valley schools

Each year local schools enrich their music education programs by replacing old instruments, enhancing their sound equipment, providing guest performances or adding computers to give more students time to practice or compose. The Music Education Fund is an endowed field of interest fund that was created by an anonymous donor. Awards this year totaled \$31,265.

### Nonprofit Management Assistance Grants

Supporting a vital nonprofit sector

This year we launched a new grant program which helps nonprofits be more effective. Grants are given to organizations that want to develop their leadership, expand their fundraising abilities or take on new marketing strategies. The Otto Bremer Foundation is key supporter of this grant program. In 2005 SCVCF awarded \$25,000.

### Valley Arts Initiative

Bringing a wide audience to local arts programs

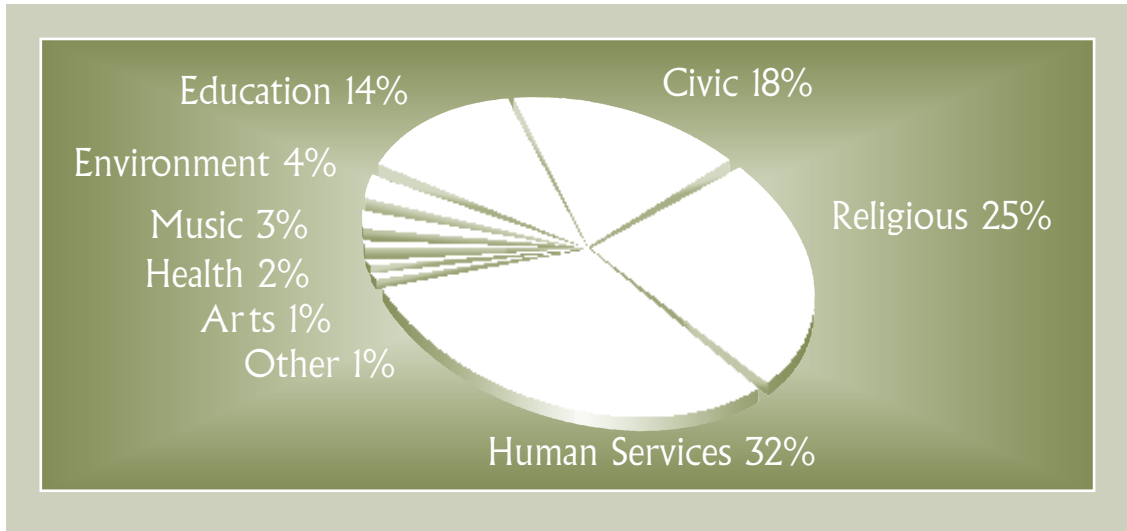
For eight years SCVCF has partnered with the Wisconsin Arts Board, foundations and individual contributors to bring funds to theater, music, dance and visual arts organizations in the Valley. Overall, our goal is to increase public understanding of, and access to the rich array of artistic activities through out the region. The total amount awarded was \$10,000.



St. Croix ArtBarn Art Camp, 2005

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## Grant Recipients

Total FY 2005 Grants: \$1,077,181<sup>00</sup>

### Arts

ArtReach Alliance  
 Franconia Sculpture Park  
 Hammond Arts Alliance, Inc.  
 Minnesota Orchestral Association  
 Music St. Croix  
 Osceola Main Street Promotions Committee  
 St. Croix ArtBarn Theatre  
 The Heritage Center  
 The Phipps Center for the Arts  
 Valley Arts Initiative Fund of SCVCF  
 Valley Chamber Chorale

### Civic

Arcola Mills Retreat Center  
 Blessing Way Family Services  
 Episcopal Mission to Children & Families  
 Friends of St. Paul Public Library  
 Hudson Community Fund of SCVCF  
 Hunger Prevention Council of Pierce County  
 Kinship of Polk County  
 Memorial to Veterans of Stillwater Area Schools  
 Minnesota League of Conservation  
 Voters Education Fund  
 New Richmond Community Foundation  
 Polk County Area Literacy Council  
 Riverway Park Partnership Fund of SCVCF

### Education

SciTAC  
 St. Croix Area United Way  
 St. Croix Valley Habitat for Humanity, Inc.  
 St. Croix Valley Sexual Assault Response Team  
 Standing Cedars Community Land Conservancy  
 Star Prairie Land Preservation Trust, Inc.  
 Stillwater Public Library  
 Two Rivers Community Land Trust  
 UW Eau Claire  
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### Education

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## Health

American Cancer Society  
Epilepsy Foundation of Minnesota  
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Gillette Children's Foundation  
Hudson Health Foundation  
Hudson Hospital  
Lakeview Hospital  
Lutheran Braille Evangelism Assoc  
Mayo Foundation  
The Smile Train

## Human Services

American Red Cross  
Autism Society of Minnesota & John Blackford  
Avanti Challenge Camp  
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Bridge for Hudson Youth, Inc.  
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Friendship Ventures & Joshua Ous  
Friendship Ventures & Karen Shogren  
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# "Opera for the Young"



Elementary kids in the play "the Pirates of Penzance", a Music Education Grant awarded for "Opera for the Young"

*"We would like to thank your foundation and board for its generosity in awarding us a grant for "Opera for the Young". "The children who attend Willow River Elementary, St. Patrick's School and Trinity Lutheran School experienced a performance by "ORY" of the classic Gilbert and Sullivan opera "The Pirates of Penzance" in the Fall of 2004. Our students benefited from a month of study about the opera, met the actors in an informal question and answer session and participated as "pirates" in the performance. Our whole school, including our staff and families, got into the spirit of the day by dressing in costume. It was an unforgettable experience for all of us and will be remembered for years to come!! Thanks again! "*

— a "Thank You" note written by the teachers of the schools

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# Baby Grand Debut

*On December 12, 2004, the Kawai RX 3C made its public debut at the Baldwin-Woodville High School Christmas Concert. The arrival of this outstanding piano had been long awaited & its presence on stage was testament to a lot of hard work & commitment on the part of the Baldwin-Woodville community in St. Croix County, Wisconsin. According to Janet Hanson, the high school's choral director, the new piano was badly needed. "The district had four upright pianos," she said, "with the newest one being fifteen years old. The technician who last tuned them said they were the worst he had come across in many years of tuning."*

*Paying for a piano like this one required some creative fund-raising. The initial grant of \$5,000 came from the St. Croix Valley Community Foundation through the Music Education grant program. The remaining funds were raised through a range of fundraising events, including pie and ice cream socials, bake sales, free-will donations at concerts, a spaghetti supper before the home football game, generous donations from local businesses, and a program offering family members, friends, business & community organizations the opportunity to sponsor a piano key. One of the more amusing fundraising moments took place during a basketball game when Janet played Christmas Carols at half-time while people filed past to donate their spare change. "Even people from the visiting team made donations," Janet recounts with a chuckle.*

*"The piano is all paid off now," she says. "We had fundraising ideas we didn't even have to use. But it wouldn't have been possible without the \$5,000 jump-start from the Foundation. That really got the ball rolling."*



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Hudson Hockey Association  
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YMCA Camp St. Croix  
YMCA of River Falls  
Young Life St. Croix Valley  
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Youth Service Bureau, Inc.

## Music

Crosswinds Middle School  
Ellsworth Middle School  
Elmwood Schools  
Grey Cloud Elementary  
Hudson Youth Experiencing the Arts  
Lakeside Intermediate School  
Luck Community Schools  
New Richmond High School  
Park High School  
School District #834  
Somerset Middle & High Schools  
Spring Valley Middle and High School  
St. Croix Falls Schools  
St. Croix Family Resource Center

Competitive grants are awarded by the Foundation's board of directors for the Music Education Program, the Valley Arts Initiative and other special projects.

Grants are limited to organizations located in Washington and Chisago counties in Minnesota and Polk, Pierce and St. Croix counties in Wisconsin. Unless otherwise specified, organizations must have 501 (c) (3) status from the IRS. Other limitations may apply.

Details regarding grant guidelines and application processes can be found on the foundation's website at [www.scvcf.org](http://www.scvcf.org) or by contacting the foundation offices at 715-386-9490. We welcome questions from interested applicants.

Grantmaking is an important role for the Foundation. Presently SCVCF oversees three granting programs and takes on special projects.

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Archdiocese of St. Paul  
Ascension Episcopal Church  
Bethlehem Lutheran Church  
Christ Lutheran Church  
Church of St. Michael  
Como Park Lutheran Church  
Ezekiel Lutheran Church  
First Congregational Church  
United Church of Christ  
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 Gloria Vorwald  
 Gordon Weber  
 Bill Zimmerman

## Honorariums

Mary Greene  
 Dan Lien  
 Vicki Olson  
 Harry Peterson

River Falls Community Theatre  
 River Falls Community Fund of SCVCF  
 River Falls Kiwanis  
 River Falls Lodge No. 109  
 River Falls Main St. 2000 Project, Inc.  
 River Falls Medical Clinic  
 River Falls Peace & Justice  
 River Falls Rotary  
 River Falls Tire Company  
 Ruth M. Roach  
 David & Babette Robb  
 Albert & Carol Roettger  
 Katherine & John Rogness  
 Karen E. Rose  
 Conway Rosell  
 Joseph & Barbara Rosell  
 Kathleen Ross  
 Thomas & Lucille Rowland  
 Stephen & Patricia Rowley  
 Robert & Matilda G. Rupp  
 Edna M. Russell  
 David Rusterholz

**S** S&C Bank  
 Bob Safe  
 Eleanor M. Samuelson  
 Sandy Hills Fund of SCVCF  
 Dr. Andrea Saterbak & Matt McGuire  
 Richard & Diane Sawyer  
 John J. Scanlon III  
 Jean Schad  
 D.R. & D.T. Schelander  
 Sharm W. Scheuerman  
 Luke & Barbara Schlosser  
 Joseph Schmidt  
 Michael Schmiesing  
 Sandi Lyn Schmiesing  
 Christopher Schmitt  
 Lowell & Marilyn Schmoeckel  
 Dr. William & Lauren Schneider  
 Lorna Schrade  
 Richard & Laverne Schultz  
 Terrence & Beverly Scully  
 Bradley A. Seim  
 Donna Mae Seim  
 John & Ann Selleck  
 Tim & Carrie Sellner  
 Chris Sendlak  
 Semple Building Movers, Inc  
 Semple Excavating & Trucking, Inc  
 David & Shantel Senn  
 Dean & Lynn Shafer Fund of SCVCF  
 Lynn & Dean Shafer  
 Daniel J. Shapiro  
 Gertrude R. Shiely Charitable Trust  
 Short Elliott Hendrickson, Inc.

John F. Shrake  
 SHS 94 Class Reunion  
 Simonet's Home Furnishings  
 Mr. & Mrs. William Bronson Simonet  
 Michael & Janet Simonson  
 Roy & Lana Sjoberg  
 Lorraine Skyberg  
 John Slowey  
 D.A. Smith  
 Donna M. Smith  
 Ellen & Clyde Smith  
 James & Jeanne Smith  
 Marlay & Margaret Smith  
 Roger & Carmen Smith  
 William & Paula Snyder  
 Hendryk & Valerie Sowa  
 Donna Blair Spencer  
 Robert & Charleen Sprague  
 Jan & Julia Spreeman  
 Kurt Sroka & Susan Tonjes Sroka  
 St. Croix Area United Way  
 St. Croix Valley Natural Gas Company  
 Afton Foundation Fund of  
 The Saint Paul Foundation  
 Allen & Amy Standaert  
 Norman Steere  
 Vern & Peg Steinmetz  
 Steven W. Schroeder & Assoc.  
 James R. Stevensen  
 John J. Scanlon III  
 Stillwater Sunrise Rotary Club  
 Cynthia & Donald Stoltz  
 Harvey Stoltz  
 Beverly O. Stoltzman  
 Joy & David Stoltzmann  
 Richard & Ann Stout  
 Dale M. Stull  
 David & Barbara Sullivan  
 Gary & Sue Sumner  
 Ellen M. Sutton  
 PT Swanson Consulting, Inc.  
 James & Laurie Swanson  
 Bradley Sweet

**T** Taking Charge, Inc.  
 Kelly & Jason Taverna  
 Rebecca M. Taylor  
 Sara Taylor-Niemann  
 Sharon Teat  
 Bruce & Mary Thalacker  
 David & Linda Therkelsen  
 The 13 Warriors  
 Joyce A. Thole  
 R.J. & E.J. Thomas  
 Linda Thompson & Mike Carpenter  
 Michael & Helen Thompson  
 Tom & Suki Thomsen

John & Mary Thoreen  
 3M Foundation, Inc.  
 Tim Linehan Memorial Fund of SCVCF  
 Timber Ridge Construction  
 Todd Tingblad & Christine Canino  
 Kathleen M. Torning  
 Tozer Foundation  
 Bruce A. Trouten  
 Nancy Q. Truax  
 John & Kathryn Tunheim  
 Tyler Painting, Inc.  
 William R. Tyra Jr

**U** Stephen & Nicolle Uban  
 UBS Fdn. Matching Gift Program  
 The UFE, Inc. Fund of the  
 Saint Paul Fdn.  
 Peter & Jean Marie Ulland  
 John & Lorraine Ulrich  
 United Way of Dunn County, Inc  
 United Way of River Falls  
 United Way of St. Croix County  
 Unrestricted Endowment Fund of SCVCF  
 John & Mary Ursu  
 J. David Utecht

**V** Andrew & Amy Vagle  
 Robert Valit  
 Patricia & Lee Valsvik  
 Jan & Ruth Vanden Bergh  
 Henry Vangurp  
 Robert & Carol Vermillion  
 Mr. & Mrs. David B. Vesall  
 Paul R. Vielhaber  
 Chris & Viki Viertel  
 Suzanne & George Vogt  
 Voiture 904 Pierce County  
 Brian & Michelle Wagner  
 John & Nancy Wald  
 Archie D. & Bertha H. Walker  
 Foundation

Gary J. Wallin  
 Virginia Weaver  
 Thomas & Mary Weber  
 Mr. & Mrs. Ronald T. Weiler  
 Thomas & Sally Weingarten  
 Donald C. Weinke  
 Wells Fargo Bank Minnesota  
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 David & Janet Wettergren  
 Kathy L. Wheat  
 Charles E. White Family Trust  
 Gregory & Gretchen Wickenhauser  
 Thomas & Mary Wihren  
 Mary E. Zorn & Troy Wilhelmson  
 Jane Rae Wilkens  
 Bruce & Dona Wilkerson  
 Rodney & Lisa Williams

Dan & Ruth Willis  
 Windmill Marina Association, Inc.  
 Dr. Ned & Christine Windmiller  
 Gary Winter  
 Wipfli CPAs  
 Rick & Rosemarie Wippler  
 Caroline & Donald Wirth  
 Wisconsin Arts Board  
 Frances Wohlwend  
 Steve & Ann Wolff  
 Tim Wong  
 Gary & Joan Wright  
 Sandra Wurm

**X** Xcel Energy Foundation  
**Y** Dennis Yon  
**Z** Robert & Deanna Zaczkowski  
 Jim Zappa

We have made every effort to accurately list all donors. Please inform us of any omissions or inaccuracies.

# Service on Committees

The St. Croix Valley Community Foundation is gratefully indebted to those members who have generously donated their time and energy by serving on and/or chairing the following committees this fiscal year. We sincerely *thank you* for the effort you have put forth on behalf of the Foundation.

Charles Arnason (bd, bda*, ds, exe, fin,)	Ginny Kass (mus)
John Baird (bd, ds, pr)	Peter Kilde (bd*, ds, cpi, exe )
Pat Benson (cov)	Barbara Klemme (bd, ds*, exe)
James Bradshaw (bd, ds, fin)	Rita Lawson (bd, exe, pr, cpi)
William Campbell (bd, cpi*, mus, art)	Marilyn McCarty (bd, bda, cpi)
John Coughlin (bd, cpi, pr)	Erv Neff, (bd, cov, aud, bda, cpi)
Patty Draxler (npm)	Patrick Pesek-Herriges (npm)
Judy Duffy (cov)	Lisa Rinde (fin)
Chris Galvin (bd, fin)	Lynn Shafer (bd, cpi, bda, mus, art)
Sally Giese (npm)	Anastasia Shartin (art)
Joanne Gustafson (cov)	Heidi Smith Erspamer (bd, bda, cpi, pr)
Ronda Haley (mus)	Gretchen Stein (bd, ds)
Janna Haug (cov)	Kris Tjornehoj (mus)
Karen Hansen (bd, ds, pro)	John Tunheim (bd, bda, aud, cpi)
Mitzi Hobot (npm)	Mark Vanasse (bd, cpi)
Nate Jackson (bd, fin, ds, pro)	Marjorie Wade (art)
Michael Johnson (bd, exe, ds, fin)	Nancy Whipkey (mus)
Andy Kass (mus)	Dan Willius (bd, ds, pr)
	Lori Zierl (npm)

## COMMITTEE MEMBERSHIP CODES

aud Audit Committee	mus Music Education Grants Committee
bda Board Affairs Committee	
bd Board of Directors	npm Nonprofit Management Assistance Grants Committee
cpi Community Partnership Initiative Committee	pro Professional Advisors Committee
cov Conversations of the Valley Committee	pr Public Relations Committee
ds Donor Services Committee	art Valley Arts Initiative Grants Committee
exe Executive Committee	* chair
fin Finance and Investment Committee	

## FOUNDATION STAFF

David H. Griffith, President  
 Peg Leutele, Executive Assistant & Office Manager  
 Jill Shannon, Director of Community Partnerships  
 Sally Hermann, Administrative Assistant

# Asset Growth Chart

2004 – 2005 Asset Comparison		
	2004	2005
<b>NET ASSETS</b>	<b>\$6,221,646</b>	<b>\$7,434,966</b>
<b>REVENUE &amp; SUPPORT</b>		
Contributions*	1,832,564	2,016,051
<b>Earnings</b>		
Realized Gains	129,279	185,341
Unrealized	400,119	262,205
Other	3,652	11,829
Fees	85,295	107,567
<b>Total Revenue</b>	<b>2,450,909</b>	<b>2,582,993</b>
<b>Grants*</b>	<b>868,922</b>	<b>934,631</b>
Fund Expense	86,648	107,602
Operating Exp.	263,424	327,440
<b>Total Expenses</b>	<b>1,218,994</b>	<b>1,369,673</b>
<small>*Does not include Intra Fund gifts and grants of \$52,658 and \$142,550 respectively from SCVCF funds transferred to other funds at the Foundation.</small>		
<b>Net Assets (6/30)</b>	<b>6,221,646</b>	<b>7,434,966</b>
Investments	6,196,628	7,426,374
Cash & other	243,326	133,835
Liabilities	-218,307	-125,243

During 2005 the Foundation found it necessary to present information in a different format. 2004 was changed for comparable purposes. An Audit Report and our 990 tax returns are available upon request.

# Leave a Legacy

A convenient and lasting way to perpetuate your support of the St. Croix valley region is to include a bequest to the Foundation in your will. The options are many, from an outright gift, to the establishment of a designated fund that would provide permanent support for the named organizations or their successors

**SCVCF**

*Celebrating 10 years of Helping You Share/ 23*