



ST. CROIX VALLEY FOUNDATION

Annual Report

Annual Report



Cover photograph by Matt Thuesen

St. Croix Valley Foundation Board of Directors



Back row, from left: Jeff Heegaard, Afton; Chuck Arnason, Marine on St. Croix; Todd Gillingham, Hudson; Board Chair Steve Wilcox, Hudson; Ann Brookman, Lake Elmo. Front row, from left: Jim Lutiger, Hudson, Dr. Gretchen Stein, Grant; Dr. David Wettergren, Grant; Marty Harding, St. Croix Falls; Andy Kass, Stillwater; Suzann Brown, Stillwater; Shannon Hooley Enright, Stillwater; Katrina Larsen, Hudson.



Proofreading credit and many thanks to Rita Lawson

What is the St. Croix Valley Foundation?

The St. Croix Valley Foundation is a locally governed public trust that enables community members, regardless of their means, to make a lasting difference in the St. Croix Valley. The Foundation's central purpose is to assist donors in accomplishing their philanthropic goals to enhance this community of communities, now and in the future. As a tax-exempt charitable organization, the Foundation provides flexible, efficient, and tax-effective ways to ensure that each donor's charitable giving achieves the greatest possible impact.

The St. Croix Valley Foundation is a unique institution available to assist anyone who lives, works, or has roots in the Valley and wants to make charitable contributions that will benefit this area or other geographic areas. Founded in 1995 by a group of forward-thinking Valley residents, the Foundation provides a way for donors to leave a legacy of their values and beliefs to future generations, to take full advantage of the tax benefits of an estate, and to advance the quality of life in the beautiful St. Croix Valley.

The mission of the St. Croix Valley 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. •

Making an Impact – Providing Community Dividends



SCVF Board Chair, Steve Wilcox

As I start my fifth year as a Board member of the SCVF and my second year as Board Chair, I've seen many changes advancing our St. Croix Valley Foundation.

We have finished the Fiscal Year 2011 with a 20% investment performance and we are celebrating making over \$31 million in grants to Valley communities since our inception in 1995. Our Board members have worked hard this year at solidifying branding, speaking to community groups and telling the SCVF story, and nurturing our donors.

Internally there have also been changes. CPA Emily Lownsbury is now our accountant and she and the rest of the professional team have tightened up procedures creating staff efficiency while ensuring quality delivery.

Through SCVF Scorecarding and committee specific Plans of Operation, your volunteer leadership continues to advance the Foundation's philanthropic scope with strategic execution.

Over 120 volunteers actively serve you, our donors, on their respective boards and committees, thus assuring program strength, investment performance, fiscal accountability and donor care.

Our Legacy Society celebration in June was a resounding success, with speaker Steve Gunderson, former Western Wisconsin Congressman and CEO of the national Council on Foundations in Washington, DC. Steve reflected that "charity is an activity of the heart, while philanthropy is an activity of the mind," urging us to think of our work as a deep investment in the communities we serve.

Coupling all of that with all the good work that our six affiliate community foundations have accomplished, I can say with assurance that we have provided our communities with philanthropic leadership and a strong vision celebrating the uniqueness of each community served.

Quality of life through diverse programs, strong returns on our funds under management, confidence in volunteer leaders investing in our future.... Community dividends come in all forms....

TRULY making an IMPACT.

Steve Wilcox Board Chair ◆

The Heritage Initiative –

Many Waters, Many Stories, One Special Place

For those of us who live and work within the St. Croix River basin, we know our region has significant stories, historic sites, cultural traditions, and rich natural resources. Imagine the possibilities of working regionally – from Prescott to Cable in Wisconsin, from Hastings to Sandstone in Minnesota, and in all areas between – to leverage our cultural, historic and natural assets to promote future economic development, historic preservation, tourism, and conservation strategies.

Across the United States people have joined together to protect and share the places they cherish by securing Congressional designation as a National Heritage Area. Over the last year, SCVF convened a task force to explore the idea of heritage designation for our region, especially its potential for generating economic activity through heritage tourism, enhancing regional identity and branding, and increasing cooperation among government, businesses and residents. This multi-sector task force includes representatives from ArtReach St. Croix, Chisago Lakes Chamber of Commerce, the City of Sandstone, Department of Natural Resources (Wisconsin), Folsom House, Freedom Park, Friends of the St. Croix Headwaters, Gammelgarden, The National Park Service, Rotary, St. Croix Scenic Byway, St. Croix River Association and St. Croix Festival Theater.

With the endorsement of 120 community leaders SCVF is about to launch *The Heritage Initiative*, a broad community engagement process that will ask residents, cultural groups non-profits and businesses throughout the St. Croix River watershed if heritage designation is right for their communities, for their future. Contact Jill Shannon at jshannon@scvfoundation.org if you would like more information as this initiative unfolds. •

Nate Jackson:

A Leading Philanthropist of River Falls

Nate came by his philanthropy honestly. He learned it from his family. His grandmother placed her home in a life estate with Concordia College – Moorhead, and when she passed away the extended family established a scholarship fund at Concordia (Nate's alma mater) and they have supported it ever since.

"I was raised by parents that taught this lesson, not so much outright, but by example," says Nate. "In the 1970s our family sponsored a young Black girl from the ghettos of Chicago, IL. Winnie would spend summers with us in small town Madison, MN, where some people had literally never seen a black person before. We provided her an escape from the tough life in the projects of Chicago and considered her another member of the family, supporting her until she was in her 20s and married."

"In December of 1975 when I was 12-years-old our family left Madison to spend a year in Papua, New Guinea. We were not missionaries, per se, but the trip was arranged by World Brotherhood Exchange. My father, a grocer by trade, worked in New Guinea with a company called Native Marketing and Supply, or "Namasu," helping the native employees of two different stores improve their management, sales, marketing and other skills. It was quite a shock to leave the luxuries of the United States and immerse ourselves in a third-world country. Goodbye big house, air conditioning, TV, friends! During this time our family learned to get by on so much less than most of us in the U.S. take for granted every day. The people we met in New Guinea had little in terms of material things, but had a huge influence on all of us. My experiences in New Guinea continue to be part of my psyche. To this day I recall prior to our departure for stateside, giving my used bike, a tee shirt and pair of shorts to a young New Guinean I had befriended. His material possessions that day doubled!"

"Linda and I are trying to educate our children on the importance of giving back. And more than just educate them, we are hoping they eventually find joy in sharing. Like many American families we have been fortunate, and have much more than we really need. Linda and I are getting the children involved in how to donate the annual distribution from our endowed fund, giving each member of the family one quarter of the grant to give out per their wishes. At some point we will suggest they each start contributing to the family fund."

In fact, the Jackson family is a three-generation-philanthropy family. Not only do he and his wife Linda have two Donor-Advised Funds, but his parents, Richard and Carolyn have one, too. His son, Nicholas, has provided for a fund in his estate plan.



Larissa, Linda, Nate and Nicholas Jackson

Nate and Linda use a short-term donor-advised fund for their annual giving, and occasionally contribute to an endowed fund they have established, The Nate & Linda Jackson Future Fund. Their estate plan calls for a bequest to the endowed fund when the first of them passes, then again upon the passing of the surviving spouse.

Likewise, their son Nicholas has already made provisions in his estate plan to leave a gift to the Jackson family's endowed fund, making him one of the youngest members of the Foundation's Legacy Society.

"Personally, I have always felt it important to "give back," said Nate, "be it time and/or talent on a committee or board, or monetarily."

Nate has given back in more than just money. He helped to launch the River Falls Community Fund (RFCF) in 1999. This fund is an affiliate of the St. Croix Valley Foundation. He was one of the original donors, as was his company, Edward Jones & Co. He served on RFCF's Board for ten years and was the chair of its Finance Committee.

He has served on the SCVF Board since 2005, and chaired the Donor Services Committee. He is leaving the Board this year. Nate has been a tireless advocate for philanthropy in the Valley. It was he who suggested that Ezekiel Lutheran Church establish a fund at SCVF, and has introduced many other River Falls area residents to the Foundation and the Community Fund. •

DAVID AND MARILYN PALMER



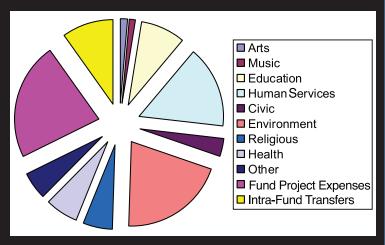
Marilyn and Dr. Dave Palmer

Dr. David Palmer is well known throughout the Valley for his success in helping people with their orthopaedic surgeries, and for his dry wit. But he's just as well known for his and his wife, Marilyn's philanthropic spirit. David's interest in the welfare of the larger community came from his father, who was a solo family doctor for 35 years in Blackduck, MN, back when there was no Medicare or Medicaid. Back then, when David was growing up, his family gave to Blackduck's Trinity Lutheran Church, but mostly they gave free medical care to people who couldn't afford to pay for it.

When David went to the University of Minnesota for both undergraduate and medical degrees, he was active in many student associations, setting the stage for the active participation in community life that he enjoys today. The day after he graduated from medical school he married Marilyn.

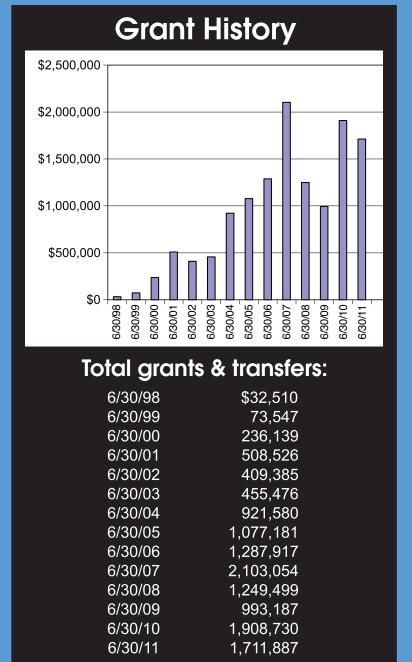
They moved to the St. Croix Valley in 1977 and David started St. Croix Orthopaedics with Dr. Bob Meisterling. Both he and Marilyn dived into the community life of the St. Croix Valley while raising two daughters. They have been members of Stillwater's Trinity Lutheran Church since 1979 and David was on the Church Council when Trinity entered upon their capital

Current Year Grants



July 1, 2010 - June 30, 2011 grants & transfers:

Arts	\$23,475	1%
Music	20,150	1%
Education	146,667	1%
Human Services	268,741	16%
Civic	59,347	3%
Environment	346,257	20%
Religious	96,157	6%
Health	107,640	6%
Other	90,503	5%
Fund Project Expenses	384,378	22%
Intra-Fund Transfers	168,572	10%
Total	1,711,887	



campaign. They have also been generous donors to public media, museums and have served on the Board of the United Way Washington County East and its Pillars Club and David has been on the Board of Directors of the St. Croix Valley Foundation since 2006.

Perhaps what David is best known for in the Valley is his medical volunteerism, which started in 1994 when he spent a month in Bhutan with his physician's assistant. In 1995 he went to Jalalabad, Afghanistan, where he cared for casualties caused by the war, usually victims of land mines and gunshot wounds, perpetrated by the Taliban. In 1996 he went to Tanzania for the first time, to help Stillwater native Dr. Mark Jacobson at the Selian Lutheran Hospital in Arusha, Tanzania. Since then David has remarked

how greatly the clinic and hospital have grown and improved over the years, especially in technology and training in the areas of arthroscopy and total knee replacement. David travels to Arusha each year in January or February for two to three weeks. Each time, he and his physician's assistant, Russ McGill, take in as many supplies as they can physically carry.

In about 1996, David and Marilyn established a medical scholarship at the St. Paul Foundation with David's elderly aunt, Laura Rathert, who wanted to leave a legacy in her home state. Two students each year from Stillwater are chosen to receive the scholarship because David and Marilyn know first-hand how difficult it is to pay for medical school. In 2011 they moved the scholarship to the St. Croix Valley Foundation so that the fund would be closer to home.

David has received many honors for his leadership, including an award for being Volunteer of the Year from the Minnesota Orthopaedic Society, where he served as president in 1995. But David and Marilyn believe it's important to walk the talk, and have always stepped up to the task, whether it's helping with the Stillwater Library capital campaign, serving as members of the United Way's Pillars Club, or helping to fund the new Heritage Initiative at the St. Croix Valley Foundation. They have both given time and treasure to their community, and much wisdom to the organizations they care about. •

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Endowment Fund United Way St. Croix Valley Long-Term Fund

Valley Senior Services Alliance Fund Washington County Historical Society Fund

West CAP Endowment Fund West CAP Fund

West Wisconsin Land Trust Fund

White Pine Festival Fund

Youth Service Bureau Fund

SCHOLARSHIP

Evelyn Elizabeth & Russell Karl Anderson Fund Paul L. Anderson Tennis Scholarship Fund Baytown Student Aid Fund Ranger Jeremy Bird Memorial Scholarship

Sadie & John Burman Memorial Art Scholarship Cemstone Companies Scholarship Fund* Frank Chaney Memorial Scholarship Fund*

Boake Christenson Memorial Scholarship

Calvin Djam Scholarship Fund Claire & Betty Erickson Family

Scholarship Fund* James & Patricia Foy Memorial Scholarship Doris Fuka Scholarship Fund

Janet M. Hansen Scholarship Fund Peter Haugen Memorial Scholarship

Dr. Val Kremser Medical Scholarship Fund Daryl K & Lois Lien Scholarship

Karl D. Ludvigson Memorial Scholarship James McLaughlin Scholarship Fund

Mooney Scholarship

Bradley W. Nordstrand Scholarship Fund

Eddie H. & Donald L. Olson Scholarship Palmer-Rathert Medical Scholarship Fund*

SCVF Young Life/ReaLife Scholarship Fund

St. Croix Valley Harley Owner's Group Scholarship

Speaks Family Scholarship for Drama

Stower Community Scholarship

Volga Scholarship

Waterman Scholarship

Wears Scholarship Fund

Henry Yetter Wrestling Scholarship

Paul & Fern Yocum Scholarship Foundation Fund*

FISCAL SPONSORSHIPS

Fishin' For Parkinson's Fund*

Hudson Vintage Neighborhood Association Fund

NBAEF Perfect 10 Fund

Our Neighbors' Place Fund

A Place of Grace Fund

Prior Lake Rotary Jazz Fund

River Croix Fund

Thomas J. Scheurman Youth Fund

Serving the 32nd Fund

St. Croix Valley Rotaract Fund

The Sharing Tree Fund The SOURCE

ARTS & MUSIC

Arts Field of Interest Fund Music Education Endowment Fund SCVF Art Survey Fund Valley Arts Initiative Project

CIVIC PROJECTS AND ISSUES

Amery Building Murals Amery Pool Fund

Amery Riverfront Development Gift Jorgenson Field

ENVIRONMENT NPS Powerline Removal Short-Term Agency Fund

River Partnership Fund of SCVCF St. Croix National Scenic Riverway Fund

St. Croix National Scenic Riverway Research & Support Fund

Robert Uppgren Fund for Sustainable Communities

HEALTH & WELLNESS

Golden Age Memorials Hoel Stewart Family Fund LADDA Endowed Fund LADDA Long Term Activities Fund

*NEW THIS YEAR

Grants

HUMANE - ANIMAL

Animal Humane Society

Arnell Memorial Humane Society, Inc.

Boone Area Humane Society

Brown County Humane Society

Can Do Assistance Dogs

Clinton Humane Society

Coulee Region Humane Society

Door County Humane Society

Elephant Sanctuary

Fond Du Lac Humane Society

Forest County Humane Society

Friends of Animals Humane Society

Friends of the Shelter Inc.

Grant County Humane Society

Green Lake Area Animal Shelter, Inc.

Humane Society of Barron County

Humane Society of Doualas County

Humane Society of Freeborn County

Humane Society of Jefferson County, Inc.

Humane Society of Kandiyohi County

Humane Society of Marathon County, Inc.

Humane Society of Northwest Iowa

Humane Society of Otter Tail County

Jackson County Humane Society

Jasper County Animal Rescue League & Humane Society

Lakes Area Humane Society

Loess Hills Humane Society

Marion County Humane Society

Martin County Humane Society

Mesabi Humane Society

Northwoods Humane Society

Oconto Area Humane Society & Animal Shelter

Ocooch Mountain Humane Society

PAWS & More Animal Shelter

Pepin County Humane Society

Pope County Humane Society

Prairie's Edge Humane Society

Shawano County Humane Society

South Wood County Humane Society

TLC Animal Shelter - Canine Center

Tri-County Humane Society

Washburn County Area Humane Society

Washington County Humane Society

ARTS AND MUSIC

Cottonwood Group Homes, Inc.

Flynn Center for the Performing Arts

Forcast Public Art Works Twin Cities

Franconia Sculpture Park

Greensboro Historical Society

Guthrie Theater Foundation

Hudson Area Chamber of Commerce

Hudson High School

Lamar - A Historic Center for Community

Loft Literary Center

North Branch Music Booster Club

River Falls Community Arts Base, Inc.

River Falls Public Library

Sheboyaan Arts Foundation dba John Michael Kohler Arts Center

St. Croix Valley Chamber Chorale

St. Croix Valley Chapter of the Barbershop Harmony Society

St. Croix Valley Orchestra

St. Croix Valley Symphony Orchestra

Summer Music from Greensboro

The Phipps Center for the Arts

Twin Cities Public Television

Vail Valley Foundation

Vermont Public Television

VocalEssence

Youth in Harmony

CIVIC

AARP

American Red Cross

American Red Cross of Vermont & New Hampshire Valley

Amery Centennial Hall & Senior Center

Amy's House

Assistance and Resource Center Inc

Christian Community Campus Foundation

City of Lindstrom

City of Taylors Falls Parks & Recreation Commission

Community Thread

Craftsbury Community Care Center, Inc.

Croixdale

Faith's Lodge

Friendship Ventures

Good Samaritan Society

Grace Place

Habitat For Humanity International Headquarters

Heifer International

Help Our Wounded

Heritage Foundation

HSI, Human Services Inc.

Hudson Area Senior Center

Hudson Daybreak Rotary

Hudson Fire Dept./Lions Golf Scramble

Hudson Police Department

Hudson S.A.F.E

Hudson Sidekicks Booster Club Inc

Interfaith Caregivers of Polk County, Inc.

Joshua Charitable Foundation

LADDA Activities Fund

Minnesota Historical Society

Minnesota Public Radio

Minnesota Real Estate Foundation

Minnesota Twins Community Fund

National Trust for Historic Preservation

New Richmond Area Community Foundation, Inc.

Northern Star Council/BSA

Northwoods Homeless Shelters

Operation H.E.L.P.

Pierce County Historical Association

River Falls Community Food Pantry

River Falls Food Shelf

River Falls Lions Club

Rotary District 5960

Salvation Army Burlington Corps

Salvation Army Headquarters

Shepherd of the Valley Lutheran Church of Afton

St. Croix County Government Center

St Croix FMS

St. Croix Valley Habitat for Humanity, Inc.

St. Croix Valley Rotoract

St. Croix Valley YMCA

Stillwater Rotary Club

Stillwater/Bayport Voiture 791

Sustain Hudson

The Salvation Army

the SOURCE

Town of Alden Charitable Fund

Turningpoint for Victims of Domestic and

Sexual Violence Inc.

Twin Cities Habitat for Humanity

United Way of Chittenden County, Inc.

United Way of Washington County - East

United Way St. Croix Valley

USO World Headquarters Valley Outreach

Vermont Foodbank

Wake Robin Corporation

Webb Lake Volunteer Fire Department

White Bear Lake Area YMCA

Wild Rivers Habitat for Humanity

Windhorse Foundation

Women's Foundation of Minnesota

WPCA Radio

YMCA Camp St. Croix

Yonso Project

Youth Action Hudson

EDUCATION

AAUW Afton Lakeland Elementary School

Afton Lakeland Elementary School PTA

Amery High School Student Council

Argosy University

BRIDGE for Hudson Youth, Inc.

Century College

Clayton Middle School

Concordia College

Dakota County Technical College

Education Foundation of Hudson Family Resource Center St. Croix Valley, Inc.

Friends of St. Paul Public Library

Friends of the Hudson Library

George Fox University

Greensboro Free Library

Greensboro Wonder & Wisdom

Gustavus Adolphus College

Hansen International Student Emergency Fund

Heritage Foundation

Hill Murray School

Hillsdale College

Hillside Elementary

Hope Academy **Hudson Hospital Foundation**

Janet Hansen Scholarship Fund

Junior Achievement of Hudson

Lakeview Foundation

Meyer Middle School Midwest Archives Conference

Minnesota Historical Society Mount Holyoke College

North Branch Area Public Schools

Northern State University Northwestern College Off the Beaten Path

Partnership Plan for Stillwater Area Schools

Salvation Army/St. Paul Citadel Corps

Renaissance Chartered Alternative Academy River Falls High School

River Falls Public Library

Shelburne Museum

Skits Outreach Services, Inc.

Somerset High School

St. Catherine's University

St. Croix Catholic School

St. Croix Central Middle School St. Croix Central Panther Parent Group

St. Croix Valley Restorative Justice Program, Inc.

St. Patrick School

St. Paul College Sterling College Trinity Academy

Twin Cities Public Television

University of Minnesota Twin Cities University of Illinois, Roger Adams Fund

University of Iowa

University of Minnesota -Duluth

University of Nebraska Foundation

University of North Dakota

University of St. Thomas

University of Tampa

University of Wisconsin - LaCrosse

University of Wisconsin - Madison

University of Wisconsin - Milwaukee University of Wisconsin - Platteville

University of Wisconsin - River Falls University of Wisconsin - River Falls

University of Wiscsonin - River Falls Foundation

University of Wisconsin - Stout University of Wyoming, Laramie

Washington County Historical Society

Wilderness Inquiry Winona State University

WITC Foundation - New Richmond

Woodbury High School

Young Life North Star Region Young Life St. Paul Youth Advantage

ENVIRONMENT Arcola Mills Historic Foundation

Carpenter St. Croix Valley Nature Center **Environmental Defense Fund**

Friends of CREX

Friends of the Stower Seven Lakes State Trail

Funders Network for Smart Growth

& Liveable Communities Great River Greening

Greensboro Land Trust

Kinnickinnic River Land Trust

Minnesota Center for Environmental Advocacy Minnesota Environmental Partnership

Minnesota Land Trust Prairie Enthusiasts Inc.

Shelburne Farms St. Croix River Association

St. Croix Scenic Coalition, Inc.

Standing Cedars Community Land Conservancy The Nature Conservancy of MN Tree Trust U. S. Geological Survey

Willow River OWLs Inc.

West Wisconsin Land Trust

Xcel Energy

HEALTH AND HUMAN SERVICES Abbott Northwestern Hospital Foundation

Alzheimer's Association Minnesota -North Dakota

Amazon Project

American Cancer Society

Grants continued...

American Lung Association Anu Family Services Inc Avanti Challenge Camp

Center for Spiritual Transformation

City of Hope (National Cancer Institute)

Copley Hospital

Courage Center St. Croix

Ellsworth Community School District

Epilepsy Foundation of Minnesota

Family Resource Center

St. Croix Valley, Inc. FamilyMeans

Gillette Children's Foundation

Girl Scout Council of St. Croix Valley

HSI Development Office

Hudson Health Foundation, Inc.

Hudson Hospital

LADDA Activities Fund

Lakeview Foundation

Lakeview Hospital

Lutheran Braille Evangelism Assoc March of Dimes - Greater Twin Cities Div. Mayo Clinic

MDA

Monica Jensen Foundation

Movember Foundation

National Federation of the Blind National Transplant Assistance Fund Peta Wakan Tipi

Philadelphia Community Farm, Inc.

Philippine Minnesotan Medical Association

Planned Parenthood of Minnesota, North Dakota and South Dakota

River Falls Ambulance

River Falls Area Hospital Foundation

Sanneh Foundation

Special Olympics MN

St. Patrick Catholic Parish

Surreia's Place, Inc.

Susan G. Komen 3-Day for the Cure

The Mayhew Program - New Found Lake

The Retreat

The Smile Train

Wayside House

YMCA Camp St. Croix

Young Life St. Croix Valley

Young Life White Bear Lake/Mahtomedi #25

Youth Action Hudson

RELIGIOUS

Ascension Episcopal Church Church of

St. Joan of Arc

Church of St. Michael

Ezekiel Lutheran Church

First Church of Christ Scientist

First Congregational United Church of Christ

First Presbyterian Church

Hope Lutheran Church

Luther Point Bible Camp

Lutheran Braille Evangelism Assoc

Networks Youth Ministries, Inc.

Open Hands Ministry Inc

Peace Lutheran Church

Plymouth Congregational Church

Plymouth Congregational Church

Neighborhood Foundation

Prison Fellowship

Race Track Chaplaincy of America, Inc. National Office

Shepherd of the Valley Lutheran Church of Afton

St. Andrew's Lutheran Church

St. Bridget's Catholic Church

St. Francis of Assisi Parish

St. Paul Lutheran Church

St. Paul's Episcopal Church

St. Peter's Lutheran Church

Trinity Lutheran Church

United Church of Christ

Memorial Gifts

Mary Ann Anderson

Nancy Baird

Fletcher Baker

Dorothy Brown

Stanford (Bob) Clausen

Gladys J. Diethert

David Erickson Jerry Forsythe

Floyd Firsch

Catherine A. Giske

Annabelle Hauth

Margaret Holmberg

William Kees

David Knott

Geoffrey Miller

Rick Muenich

Daryl Neisse

Faye Nelson

Ella O'Connell

Harold & Marie Ostendorf

Donald Page

Gladys Timmerman Peters

Beatrice Richard

Don Scholl

Laurice Sterba **Bob Thiers**

Diane Thompson

Jack Thorsen George Timmerman

Fern Yocum

Gifts in Honor of

Joan Beaver Susan Beck

Carol Daly Amy Hamborg

Dean & Linda Henderson

Marc Otto

Sue E. Watters Paul Weiler

Former Board Members

Sarah Andersen

John Baird

Lurline Baker-Kent

Gretchen Bell

James Bradshaw David Brandt

John Coughlin

Kathleen Doar

Lou Fuller Molly Galewyrick

Jim Gillespie* C. R. Hackworthy

Jim Hankes

Karen C. Hansen

George Hauser Rod Hofland Larry Horsch

Orv Johnson Peter Kilde

Barbara Klemme* Rita Lawson

Daniel Lien

Marilyn McCarty

Dan McGuiness **Erv Neff**

JC Pfeiffer

Thomas Scheuerman*

Lawrence Severson

Lynn Shafer

Heidi Smith-Erspamer

John Tunheim

Kathy Tunheim

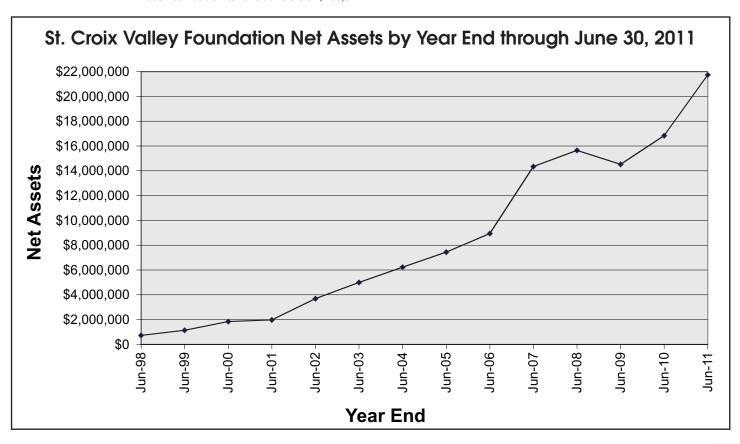
Dan Willius *DECEASED

Asset Comparison Chart

	June 30, 2011	June 30, 2010
Net Assets	\$21,736,613	\$16,832,730
Revenue & Support		
Contributions	3,824,108	2,687,457
Earnings Realized gains Unrealized Other Fees Total Revenue	461,472 2,613,640 18,470 297,085 7,214,775	392,938 1,245,714 25,252 258,968 4,610,329
Grants* Fund Expense Operating Expense Total Expenses	1,543,315 303,124 464,453 2,310,892	1,549,136 300,271 449,968 2,299,375
Net Assets (June 30) Investments Cash and other assets Liabilities	21,736,613 21,737,773 33,413 (34,573)	16,832,730 16,833,257 34,604 (35,131)

The amounts listed above are unaudited. An audit report and 990 tax return are available on request.

^{*} Does not include interfund transfers of \$168,572.



Affiliate Foundations

The St. Croix Valley Foundation is pleased and proud to have as our partners six wonderful affiliated community foundations within our region. Affiliate community foundations are groups of citizens active within individual communities who have an abiding love and dedication to their home town and surrounding areas. These individuals come together in Advisory Boards to plan for the well-being of their own towns. They raise funds locally, and they make grants locally, thus taking care of local needs. We thank them and congratulate them for the good work they do!

Amery Area Community Foundation

The Amery Community Foundation was founded in 1984 by the City of Amery, local organizations and concerned citizens as a community trust. Its purpose was to afford individuals the opportunity to make lasting, flexible gifts to meet the needs of residents in the Amery area. It affiliated with the St. Croix Valley Foundation in 2008, and its goals have remained steadfast: to assure donors that gifts made today will be professionally managed and used wisely and effectively to enhance the community's future well-being.

During this last year the board of advisors completed a Strategic Action Plan for 2011-2013. As a result the name was changed to the Amery Area Community Foundation and implemented a new mission statement as follows: We build permanent endowments and provide philanthropic leadership, enabling donors to make lasting investments in the community.

The Amery Community Foundation currently holds over \$1 million in assets. During the last fiscal year, grants were made to the following organizations: Amery Centennial Hall, Arnell Memorial Humane Society, Cottonwood Group Homes, Family Resource Center, Friends of the Stower Seven Lakes State Trail, Interfaith Caregivers, Northwoods Homeless Shelters, Indianhead Chorus and Wild Rivers Habitat for Humanity. Donor designated funds were also given for Amery School scholarships, Jorgenson Field and United Way St. Croix Valley. The Amery Area Community Foundation recently made a \$25,000 pledge toward the construction of the Amery Pavilion.



Left to right: Margo Rosen, board chair; Sally Klevgard; Karen Krupa; Dan Draxler, treasurer; Joyle Anderson; Paige Williams; Ray Siggens, immediate past chair; Jerry Tessman; Sue Johnson; David Erspamer. Missing: Kari Fladwood and Mary Lou Stanley

Ray Siggens, President Kari Fladwood, Vice President Margo Rosen, Treasurer Paige Williams, Secretary Joyle Anderson

Bruce Johnson, deceased

Dan Draxler David Erspamer Sue Johnson Sally Klevgard Karen Krupa Margee Lien Larry Riemenschneider Mary Lou Stanley Jerry Tessman Dan Lien, Advisor

For more information, contact:

Margo Rosen 608 Harriman Avenue South, Amery, WI 54001 www.amerywisconsin.org ◆

Chisago Lakes Area Community Foundation

The mission of the Chisago Lakes Area Community Foundation is to establish permanently endowed funds for the Chisago Lakes area that will provide perpetual resources to enhance the quality of life and encourage charitable giving in the Chisago Lakes Area, which includes Almelund, Center City, Chisago City, Chisago Lakes Township, Franconia Township, Lent Township, Lindstrom, Shafer, Shafer Township and Taylors Falls.

The interest from these endowed funds will benefit: Education, the Arts, Music, Health, Civic Needs, Human Resources and the Environment.

For more information, contact:
Tom Hallberg at 651-257-2937 ◆



Left to right: Jim Stein, Jim McCarville, Dave Dobosenski, Noel Stensrud, Dan Hoolihan, Lou Ann Mattson, Christopher Eng, Brenda Palmquist, Tom Hallberg, Don Bungum, Loretta Anderson

Tom Hallberg, Chair Dave Dobosenski, Vice Chair Noel Stensrud, Secretary Loretta Anderson

Karen Brohaugh Don Bungum Christopher Eng Jim McCarville Dan Hoolihan Lou Ann Mattson Brenda Palmquist Jim Stein



Front row, from left: ppast president Jay Griggs, Annette Cook, president Dick Whitcomb, John Schommer and vice president Tricia Christensen; Back row, from left: Mike Leverty, Jodie Bakken, Ryan Cari, new member Meg Heaton, Al Kiecker, new member Mary Claire Potter, treasurer Dewey Swanson and new member Brenda Bredahl. Not pictured: board members Paul Bourget, secretary Kim Burns, John Malmberg, Barry Lundeen, Bill Wanner and Ernie Wallin.

Hudson Community Foundation

Hudson is a community noted for its high quality of life and its citizens' willingness to seek innovative ways to maintain and further enhance their community's livability. The Hudson Community Fund (HCF) is a charitable organization, which seeks to attract and develop community and philanthropic assets to enhance the quality of life of individuals and families in the Hudson, Wisconsin area.

The Hudson Community Foundation has assets of over \$1 million, and has made grants to local nonprofits of over \$100,000 in its ten years of existence.

Dick Whitcomb, President	Brenda Bredahl	Barry Lundeen
Tricia Christiansen, Vice President	Ryan Cari	John Malmberg
Dewey Swanson, Treasurer	Annette Cook	Mary Clare Potter
Ryan Cari, Secretary	Stew Erickson	John Schommer
Iay Griggs, Immediate Past President	Meg Heaton	Joel Skinner
Elliot Anderson	Alan Kiecker	Ernie Wallin
Iodie Bakken-Young	Mike Leverty	Bill Wanner

For more information, contact:

Paul Bourget

Dick Whitcomb, President at 715-386-1185 www.HudsonCommunityFund.org ◆



The Afton Community Foundation has been a long-time affiliate of the Saint Paul Foundation but decided several years ago that as a river city on the banks of the St. Croix, that it most properly fit best as an affiliate of the St. Croix Valley Foundation. It serves the communities of Afton, Lakeland, Lakeland Shores, Lake St. Croix Beach and St.

Lakeland, Lakeland Shores, Lake St. Croix Beach and St. Mary's Point. This year has been very busy for the Board as they made several grants to the Lakeland Afton Elementary School, went through a planning process and began to build a base of supporters in the community.

The mission of the Afton Community Foundation is to act as a catalyst for improving the wellbeing of our Valley's residents, safeguarding our natural resources and promoting common interests through proactive citizenry involvement, care and compassion.

Its vision is to interweave the unique attributes of each Lower St. Croix Valley city into one fabric of community interaction, care and compassion.

Todd Streeter, Chair Tom Hobert

Jeff Heegaard, Secretary Peter Quinn

Pat Riley, Treasurer Rick Meierotto,

Debbie Erickson Kari Rominski, Advisor

David Nelson Heidi Hubbard

Maggie Arzdorf-Schubbe Andy Kubiak

Bob Craggs

For more information, contact:

Todd Streeter at 651-439-4001 http://lscvcf.com/ ◆



Left to right: Sandra Wurm, Steve Leitch, Linda Jacobson, Byron Dopkins, Nate Jackson, Dan Davison, Jeff McCardle, Leo Beskar, Bonnie Carroll, Judy Rommel

River Falls Community Fund

The River Falls Community Fund has the purpose of serving the greater River Falls, Wisconsin area as a community fund which seeks to attract and develop community and philanthropic assets which will enhance the quality of life for individuals and families in the areas.

The fund accomplishes its mission by:

- Building a community of donors encouraging residents and others to invest in the community by contributing towards and establishing endowment funds;
- Offering donors simplicity and flexibility in charitable giving, maximum tax advantages and the knowledge that their gift will benefit our community in perpetuity;
- Accumulating, managing and growing the endowed funds wisely;
- Initiating, promoting and supporting ways that stimulate the further development of our community's livability; and
- Directing the income from the endowments to fund effective programs which maintain and enhance the community's quality of life.

Steve Leitch, Chair Bonnie Carroll Steve Schroeder
Bill Montgomery, Vice Chair Tim Ericson Judy Wiff
Byron Dopkins, Treasurer Jeff Johnson Jim Williamson
Judy Rommel, Secretary John Levi
Leo Beskar Dean Rohde

For more information, contact:

Bill Montgomery at 715-425-5426 www.riverfallscommunityfund.org •



Stillwater Area Foundation

The Stillwater Area Foundation is the newest affiliate foundation in the St. Croix Valley, and was established in May 2010. Its mission is "To create an endowment fund for the greater Stillwater area that provides resources to enhance the quality of life and encourage philanthropic activities." SAF has made its first grants this year and is currently going through a planning process.

 Tom Weidner, Chair
 Dr. Kevin Bjork
 Jill Greenhalgh

 Alex Neff, Vice Chair
 Dwight Cummins
 Maria Reamer

 Peter Clements, Treasurer
 Shannon Hooley Enright
 Eric St. Martin

Joni Polehna, Secretary Curt Geissler

For more information, contact:

Tom Weidner, Tweidner@eckberglammers.com ◆

STORIES OF GRANTS & PARTNERSHIPS

Health and Wellness Grants

Grants to Address Childhood Obesity

This year the SCVF launched a new grant program designed to address changing health needs. To start, the Health and Wellness grants focused on childhood obesity – a key health priority identified by five county public health departments along the lower St. Croix River. Growing evidence shows that many young people are increasingly sedentary, gravitating to a virtual indoor reality. For this reason SCVF awarded grants to six programs that each explored the interactions between physical activity and healthy eating while encouraging children and families to experience the abundant natural resources our region has to offer.. our parks, farms & gardens, open spaces, forests, trails, lakes and rivers.

When donors gave to SCVF's Health and Wellness fund they did so knowing the fund would address changing health needs – issues they might not have considered when they made their gift. This is a dynamic grant program that will evolve over time as health needs change. Some examples of the programs funded this year:



Family Resource Center, St. Croix Valley took their ten week play and learn groups outdoors, helping young parents learn parenting skills along with nutritious eating. For the kids it was about the birds, scavenger hunts and animal tracks.



Philadelphia Farms provides gardening experiences giving city kids an opportunity to pick beans, dig carrots and learn where their food comes from. And at the end of the day they take a bushel of fresh foods back to the city.



Which way is North? This year eighth graders at **Ellsworth School District** will embark on nature hikes – on dry ground or in snow shoes – using their new skills reading a compass.



FamilyMeans created outdoor experiences to get young people active, exploring the Valley by foot, canoe and by bike. **Hudson School District** did much the same – nature hikes, snowshoeing – giving students K-6 a chance to be active in a non-competitive environment. ◆



Annual Legacy Celebration

In June SCVF hosted its annual Legacy Celebration to honor and thank Legacy Donors. It was held at the Washington County Historic Courthouse in Stillwater. The speaker was Steve Gunderson, former Congressman from Western Wisconsin and current CEO of the national Council on Foundations in Washington, DC. ◆





The St. Croix River Fund -

Doing more together

The St. Croix River. Whether you paddle, boat, fish or swim, for many the St. Croix River is a source of memorable experiences and lasting memories. And it defines our sense of place, providing a scenic backdrop for our river communities.

The St. Croix River Fund is a new fundraising partnership joining the St. Croix Valley Foundation, the St. Croix River Association and St. Croix National Scenic Riverway. Through this strategic effort we have joined to create a single source for river giving. Rather than each of us developing separate approaches, we are collaborating. **One River, One Fund.** We are combining resources and ideas to do **more together than we can do alone.**

Why do you love the St. Croix River? By giving to the *St. Croix River Fund* donors can give to the river first knowing their funds will be used efficiently and effectively to promote a place they love − both today and tomorrow. And you have many choices − give to support shared river projects or designate your gift to an organization directly. For more information contact Tracy Maki at 612-991-6327. ◆

Discover

Meaningful connections, experiences for young and old

Protect

Clean water, diverse habitats

Enjoy

Shared use of scenic and historic places



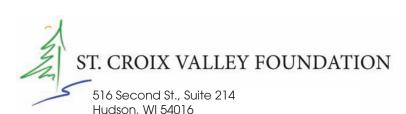


ST. CROIX NATIONAL SCENIC RIVERWAY



The Sharing Tree

Each year the Sharing Tree provides school supplies and backpacks to students in need enrolled in the Hudson school district. What began as a family commitment for Ken and Cindy Corbett and sons Bryan, Nicholas and Drew has now evolved into a larger voluntary effort. This year 21 volunteers filled 170 backpacks, helping students get a solid start on the school year. For some, a backpack full of supplies is a highlight of the year.



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715-386-9490 www.scvfoundation.org info@scvfoundation.org

LEGACY SOCIETY * DECEASED

Anonymous John & Nancy* Baird Jon & Metta Belisle Jim & Jayne Bradshaw David and Sandy Brandt Gloria & Stephen Carlson Robert C. Collins*

Shannon Hooley Enright & Michael Enright Tim & Vallie Ericson Jim * & Marv R. Gillespie David H. Griffith C. R. & Cynthia Hackworthy, II Craig Hansen & Karen Ciegler Hansen

Nate & Linda Jackson Nicholas Jackson Michael & Janet Johnson Orv & Kathy Johnson Barbara Klemme* Rita & Bill Lawson Robert & Janet Meisterling Marie L. Olsen

Thyra S. Ostrand David H. & Marilyn A. Palmer Ivine Post* Gretchen M. Stein Ph.D. John F.* & Shirley L. Turek Steve & Terri Wilcox Dan & Ruth Willius

FOUNDERS SOCIETY* NEW THIS YEAR

3M Center* Andersen Corporation

The Andersen Foundation

Fred C. and Katherine B. Andersen Foundation

Hugh J. Andersen Foundation

Sarah J. Andersen

Anonymous Donors

Charles & Peggy Arnason

John & Nancy Baird

Bayport Foundation of the Andersen Corporation

BNA Properties LLC

Jim & Jayne Bradshaw David and Sandy Brandt Otto Bremer Foundation

Ann & David Brookman

Loren & Ruby Croone

The Dietz Family Fund of

The Saint Paul Foundation

Kathleen Doar & Alan Sinaiko First National Bank of Hudson

First State Bank and Trust of Bayport

Chris & Connie Galvin

Jim & Mary R. Gillespie

David & Katherine Griffith

C. R. & Cynthia Hackworthy

Craig Hansen & Karen Ciegler Hansen Hardenbergh Foundation

Jeff & Lucy Heegaard

Gerald & Yvonne Hoel

Jack and Joyce Hooley

HRK Foundation

Hudson Community

Needs Fund of SCVF

Nate & Linda Jackson Michael & Jan Johnson

Orv & Kathy Johnson

Joyful Women Fund Rita & Bill Lawson

Margaret Rivers Fund

McKnight Foundation

David H. & Marilyn A. Palmer

S&C Bank

Gretchen M. Stein Ph.D.

W. Patrick & Jeanne Riley

Tozer Foundation

Jack & Kathryn Tunheim

William Voedisch &

Laurie Carlson

Archie D. & Bertha H. Walker

Foundation

Steve & Terri Wilcox &

Resultants for Business

William H. Phipps Foundation

Wipfli CPAs

Wisconsin Humanities Council