



Catholic Community
FOUNDATION
OF MINNESOTA

of one heart

SOLIDARITY INSPIRING GENEROSITY

ANNUAL REPORT **2019**

of one heart

SOLIDARITY INSPIRING GENEROSITY

ACTS 4:32

The community of believers was of one heart and mind, and no one claimed that any of his possessions was his own, but they had everything in common.

Like the early community of believers we read about in the Acts of the Apostles, our Minnesota Catholic community is passionate and bold in its shared faith. And we, too, strive to be “of one heart” — to place solidarity above self. We demonstrate this commitment through inspired generosity that seeks to steward our faith and strengthen our entire community now and forever.



Dear Friends,

What is a community if it doesn't hold beliefs in common and come together to act on those beliefs? Isn't that what we celebrate at Mass? When our shepherd holds the host before our eyes and says, "The Body of Christ," we affirm our belief with a simple "amen" — it is so. Then, we take and eat. We *believe*, and so we *do*.

Since its founding, the Catholic Community Foundation of Minnesota (CCF) has been a place for Catholics of all charisms to gather and express gratitude for their blessings. While giving priorities vary, our donors are united by a profound belief that they are temporary custodians of resources which they are called to share with others. They believe, and so they do.

CCF facilitates this important work, and the more we share the stories of our donors, the more eager faithful Catholics are to join us. This year, the number of new funds opened rose 20 percent, and assets have grown to \$378 million. Donor-directed grants totaled \$15.3 million, and CCF awarded \$1.3 million to our Catholic community.

Though numbers are important, they never tell the whole story. Like the relief a family feels when they receive tuition assistance, making it possible to send their child to a Catholic school. Or when the humanity of a homeless person is recognized, and they receive shelter and culturally responsive services. Whether it's acting on the Church's commitment to justice, or laying the groundwork for the future of the Church, CCF donors work in solidarity to build a better community.

Entrusted with the generosity of our donors, we also continue to evolve as a Catholic investor. Where once we simply screened investments in order to align with Catholic teaching, now we also leverage our influence as a shareholder and invest funds in ways that explicitly promote the common good.

I am always humbled by the sacred trust our community has given us to steward their generous faith in action. To our donors, community partners, and board members, thank you. You have shown, once again, that we are always better when we work together with one Catholic heart.

Sincerely,

A handwritten signature in dark ink, appearing to read "Anne".

Anne Cullen Miller, MBA
President

OUR MISSION

The Catholic Community Foundation was founded in 1992 with the mission to support financially the spiritual, educational, and social needs of our Catholic community.

OUR GUIDING PRINCIPLES

CATHOLIC IDENTITY — *We reflect our Catholic faith in all we do; embrace the breadth, diversity, and commonality of Catholic interests; and assure that investments and grant recipients are in alignment with Catholic values.*

SERVICE — *We respond to the financial needs of the Catholic community and contribute to effective solutions; collaborate with other nonprofit organizations when consistent with our mission; and provide for the needs of future generations.*

PUBLIC ACCOUNTABILITY — *We recognize and act on the understanding that community foundations are sustained by public trust, which is earned by full, open, and public disclosure.*

of one heart

SOLIDARITY INSPIRING GENEROSITY

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SNAPSHOT 2019

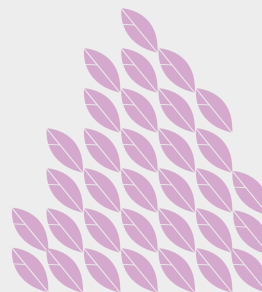
59
NEW FUNDS
OPENED



13 – Agency



4 – Endowed



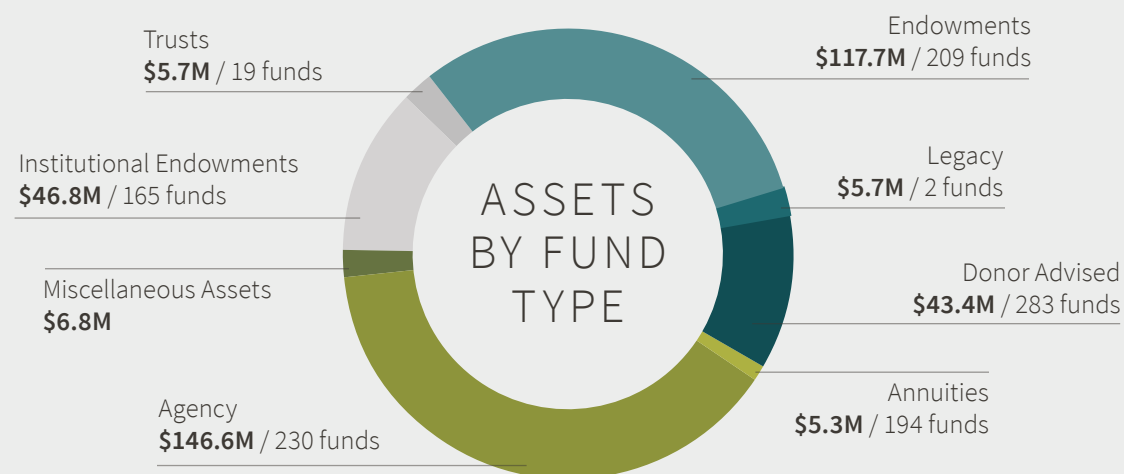
33 – Donor Advised



9 – Institutional Endowed

\$378 Million

ASSETS HELD BY CCF

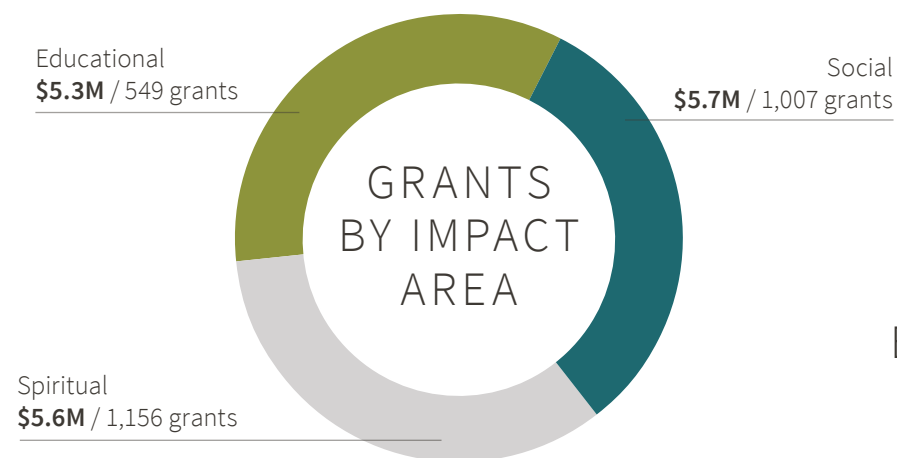


\$19.6 Million

ASSET GROWTH

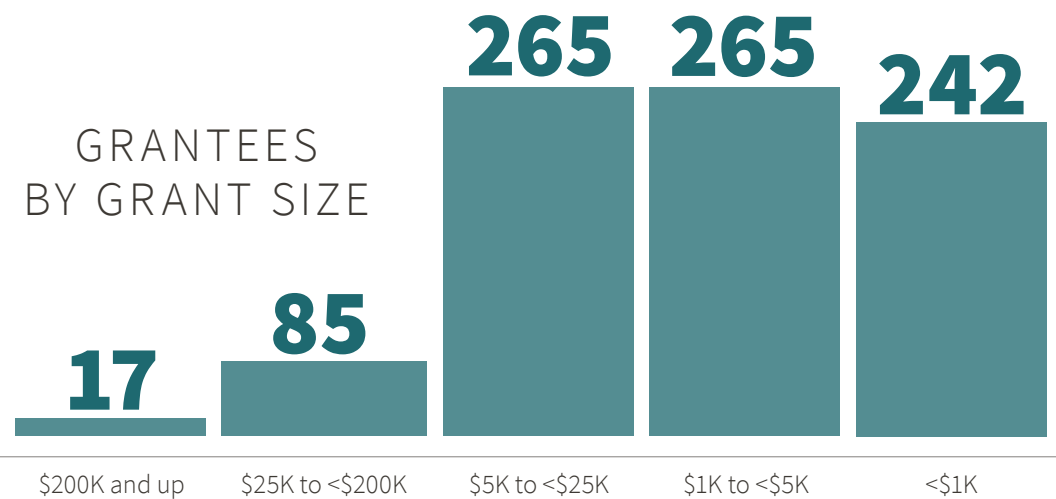
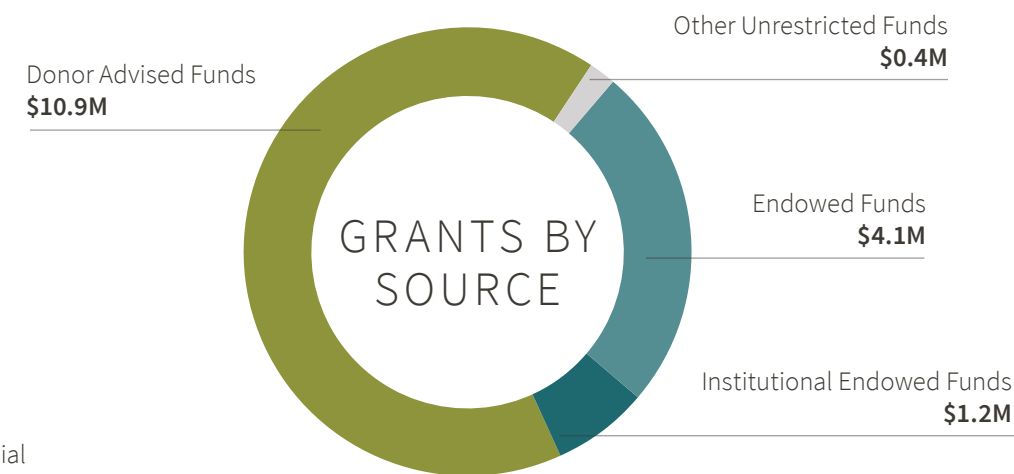
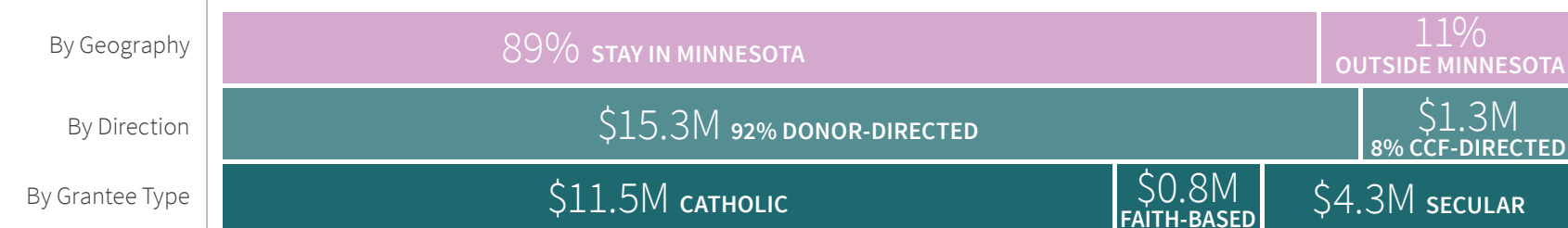
\$16.6 Million

GRANTS DISTRIBUTED



\$171M+ DISTRIBUTED
SINCE 1992

FY2019
GRANTS



2,712

GRANTS DISTRIBUTED TO

874

NONPROFITS

STATEMENTS OF ACTIVITIES

For the years ending June 30	2019	2018
Revenue		
Total Contributions	\$23,582,467	\$ 28,748,536
Less: Amounts Received for Beneficial Endowments	5,146,214	3,160,152
Net Contributions	18,436,253	25,588,384
Management Fee Income	1,100,770	1,078,333
Investment Income, Net of Investment Expenses	7,806,783	12,000,123
Change in Value of Split Interest Agreements	(105,128)	(241,206)
Total Revenue	27,238,678	38,425,634
Program Grants		
Total Grants	16,625,756	13,641,903
Less: Grants Made on Beneficial Endowments	1,211,118	1,068,900
Net Grants	15,414,638	12,573,003
Operating Expenses		
Donor Relations & Development	1,358,285	1,315,340
Management & General	914,446	907,873
Grant Services	319,014	295,367
Total Operating Expenses	2,591,745	2,518,580
Change in Net Assets	9,232,295	23,334,051
Beginning Net Assets	166,809,182	143,475,131
Ending Net Assets	\$176,041,477	\$ 166,809,182

STATEMENTS OF FINANCIAL POSITION

As of June 30	2019	2018
Assets		
Cash & Cash Equivalents	\$11,474,196	\$ 9,905,619
Investments	359,420,898	340,324,720
Beneficial Interest in Trusts	506,135	681,297
Cash Surrender Value of Insurance Policies	3,799,934	3,668,878
Pledges & Bequests Receivable	1,825,791	3,072,728
Other Assets	888,378	654,570
Total Assets	\$377,915,332	\$ 358,307,812
Liabilities		
Accounts Payable & Accrued Liabilities	\$1,393,755	\$ 1,303,732
Agency Obligations	148,069,573	142,691,106
Beneficiary Endowments	46,759,767	41,027,780
Charitable Trust & Gift Annuity Obligations	5,650,760	6,476,012
Total Liabilities	201,873,855	191,498,630
Net Assets	176,041,477	166,809,182
Total Liabilities & Net Assets	\$377,915,332	\$ 358,307,812

Audited financial statements containing all required disclosures and IRS Form 990 are available at www.ccf-mn.org



Photo credit: Michael Haug

Navigating Aid to the Homeless with Compassion, Purpose, and Solidarity

In the fall of 2018, a Catholic Community Foundation of Minnesota (CCF) donor became increasingly concerned about an encampment of people experiencing homelessness that had developed on Hiawatha Avenue. As he passed it each day on his way to and from work, he wondered what would happen to those living in tents when temperatures would eventually plummet. Having grown up in Minneapolis, he felt this was his home and these were his neighbors.

From press reports, he knew that Native American organizations and other nonprofits serving the homeless were developing a plan to move residents from the encampment to a “Navigation Center” that would combine temporary shelter with wrap-around social services.

City officials were openly acknowledging they’d have difficulty raising the \$1.5 million needed to build a temporary shelter — much less an additional \$1.5 million to fund operations.

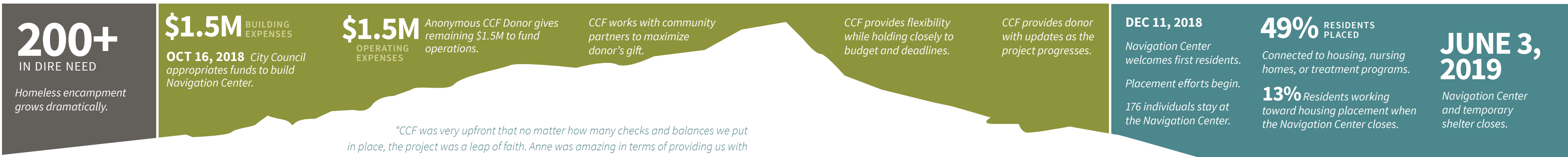
A STRONG CALLING TO SERVE

Knowing he had the funds to make a difference, the donor met with his family to discuss his desire to make a one-time donation to serve as a catalyst for community action in addressing the humanitarian crisis. With their full support, he took action.

“I knew we would need a partner to assist us with anonymously supporting the project,” says the donor. “Being Catholic and knowing about the great work done in our community by the Catholic Community Foundation, I phoned Anne Cullen Miller and told her about our family’s calling to support the Navigation Center.”

“I believe the timing of the call was providential,” says CCF President Anne Cullen Miller. She had driven by the encampment the day before and also worried what would happen when the weather changed. “It was an enormous challenge and not something CCF had ever done at that scale — but who could refuse to facilitate such generosity?”

AN EIGHT-WEEK MIRACLE



A COALITION OF THE MORE-THAN-WILLING

While CCF didn't have the internal resources to construct or manage a facility designed to house, feed, and provide services to nearly 200 people in dire need, Anne had a network of community partners who gladly agreed to help CCF maximize the impact of the donor's generosity.

Her first call was Catholic Charities of St. Paul and Minneapolis. "At the time of the encampment, all of the shelters in the Twin Cities were already full," says Tim Marx, president and chief executive officer of Catholic Charities. He was immediately on board to provide whatever assistance he could.

AN EIGHT-WEEK MIRACLE

A team of government and nonprofit agencies moved heaven and earth to erect the temporary Navigation Center, where encampment residents could not only survive the winter but find paths to permanent housing and more stable lives.

While the City of Minneapolis bore the cost of building the center, the operational costs were funded almost entirely through the generosity of CCF's anonymous donor.

"The Catholic Community Foundation was definitely at the table as we were figuring out logistics like how to pay for everything from snow removal and security to laundry and temporary toilet facilities," says Steve Horsfield, executive director of Simpson Housing Services, the organization responsible for operating the Navigation Center.

"CCF gave us a great deal of flexibility which was important

given the short time frame," says Steve. "On the other hand, they expected us to be accountable for budgets and timelines."

"In my 25 years in public service, I don't think I've ever seen a project come together so quickly," says Margaret King, who served as project coordinator for the Navigation Center and who had previously worked as director of housing programs at Seattle's Downtown Emergency Service Center.

"This was a public/private partnership of unprecedented speed, scale, and intensity. I don't know if it would have been possible without CCF's anonymous donor."
— Tim Marx, President & CEO, Catholic Charities

SPIRITUALITY IN ACTION

Catholic teachings encourage sensitivity and respect for other cultures and their traditions. For this CCF donor, honoring Native American culture and spirituality was as essential as providing food and shelter. He was happy to provide financial support for the Native American "navigators" who connected residents with resources for stable housing, medical care, mental health, and chemical dependency services.

Mike Goze, president of the American Indian Community Development Corporation (AICDC) worked with the Minnesota Indian Women's Resource Center (MIWRC) to recruit and manage the Native American navigators who helped ensure that traditional Native practices, prayers, and ceremonies were part of daily life.

"The funds provided by the Catholic Community Foundation paid for those services," says Mike. "It really made a difference, particularly to individuals who were suffering from homelessness or substance abuse."

"The funds provided by the Catholic Community Foundation paid for those services. It really made a difference, particularly to individuals who were suffering from homelessness or substance abuse."
— Mike Goze, President, AICDC

SIX MONTHS LATER

By the time the Navigation Center closed in June, 2019, 49 percent of the encampment residents who moved there had been connected to housing, nursing homes, or treatment programs — many more than the typical 15 percent of adult shelter guests who move into permanent housing.

Margaret believes the leadership provided by the Metro Urban Indian Directors, a consortium of Native nonprofits, was key to the unprecedented success of the Navigation Center, "Going forward, this project will change the way public agencies interact with Native American nonprofits."

The anonymous donor is grateful for having had the opportunity to serve, "Our family felt incredibly blessed to have been part of such a unique response to a crisis in our community. We feel a great debt of gratitude to CCF for providing such committed leadership throughout the journey." ●

Legacy Society Members

The Legacy Society honors individuals and families who have entrusted their charitable legacy to the perpetual and faith-consistent stewardship of the Catholic Community Foundation. We are deeply grateful for their dedication and charitable vision. This list reflects membership in the Legacy Society as of June 30, 2019.

Bolded names denote members inducted into the Legacy Society in fiscal year 2019.

The † symbol denotes Legacy Society members who have passed. Please hold them in your thoughts and prayers.

A	William Altenhofen † Bernadette Amerongen Charles and Viola † Amundsen John and Elsie Andraschko Walter Andrychowicz † John and Kim Arens Filemon † and Shirley Asuncion James Audette		Dr. Paul and Ann Dickinson Drs. Mark Diekmann and Deborah Pryor-Diekmann Thomas and Betty Nell Dolan James and Christine Doody Dr. George and Patricia Dorsey † Most Rev. Paul Dudley, D.D. † Thomas and Hannah Dzik
B	David and Rita Baden Patrick and Sandy Baldwin Severne Banack Donald † and Marjorie Bartho William L. Belkengren Robert and Mary Belongie Karl Berndt † Mary Bettenburg Richard and Carol Biniek Earl and Lorraine Blaylock † Dolores Blenkush † Warren and Marilyn Blomquist † Harold and Patricia Boerboom † Patricia Borre Daniel and Mary Jane † Borrell Ellen Cull Bouslough † Dr. R. Michael and Sharon Bowen Harold Brady Milton and Adeline Brecke † Jerome Brown † John and Betty Bruender Rev. John Brunner † Frank Bruns, Jr. Raymond and Helen Brya † Leona Burke † J. Donald Burns † Thomas Busch Vivian Byers † Rev. Albert Byrne †	E	Alfred and Mary † Elder Marilou and Donald Eldred Thomas and Patricia Emmer Larry and Janet Enerson Theodore and Mary Estrem †
		F	Raymond and Genevieve Feltl † Susanna Fleischhacker † Rev. Martin Fleming † Richard and Margaret Fleming † Paula Flück † Most Rev. Harry Flynn, D.D. † James and Elizabeth Foley Lyle † and Barbara Franke Francis † and Jean Franta Joleen Franta † Eugene and Mary Frey Rev. Francis Fried Clara Fulton
		G	Thomas Gainor and Jan Nolan G Elizabeth Gardner Rev. Msgr. Francis Garvey † Ronald and Brenda Gieneart Philip † and JoAnn Gitter Rev. Robert Goblirsch Richard and Delphine Goldstranc Edward † and Barb Gorski Thomas and Joleen Greene John and Patricia Gries Julie Grill Dr. Joseph and Clarice Gryskiewi Robert † and June Gust
C	Frances Callaghan † Francis and Ruth Callaghan † William and Connie Carroll † Joseph and Fern Check † Donald and Oma Christle † Robert and Judith Claflin Alfred Colling Clement and Molly Commers Dr. Joseph and Louise Connolly † Norb and Mary Ellen Cenzemius William and Marilyn Dejarlais Rev. Dennis Dempsey	H	Rev. Paul Hadusek † Edward and Margaret Hagerty † Raymond and Sally Haik † Mary Ellen Halverson Mimi and John Harrigan Hazel Heim † Quentin † and Sally Heimerman George and Katherine Henrich Julia Herl † Lawrence and Barbara Hessburg
D			

	Rev. Msgr. Patrick Hessian † Eugene and Barbara Hickok Rev. Mr. Gary and Jacqueline Hoffman Thomas and Patricia Holloran Marjorie Horst † Marjory Hougher † Rev. Leo Huber † Patricia Huber and Jerry Cawley Thomas and Julie Hurley Carolyn Huston Clarence and Bernice Hynes Shaun Irwin Richard and Ruth Ann † Jacobs Len and Bea Japs † Donald and Marian Jardine † Leo and Arlene Jarombek † Ray † and Cleorie Johnson Warren Johnson † Clarence and Clara Jorgensen † Paulette Joyer Thomas and Shirley Jungels Mary Kading † Charlotte Kangas † Anne Keller Barbara Keller † Bernice Kelly † Gerald † and Charlotte Kelly Clarence and Dorothy Kelzer Lorraine Kelzer Mary Kay Kennedy Robert and Margaret † Keppel Adella Kerber † Edwin Kerber † Elizabeth J. Keyes Ralph and Bette Keyes † Margaret M. King † Harry and Audrey Kirby † Rev. Francis Kittock James and Mary Klein † Rosann and Kenneth Klutzke Jan Kohler and Kenneth † Schwalbach John and Kathleen † Kokesh John and Rajah Kolb † Allen † and Elaine Kolles Richard and Karen Koppy Joan Korkowski Richard † and Mary Anne Kramer Dr. Stephen and Marla Kramer Vivian Kratz †	
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L	Norbert and Teresa Krenik Thomas and Janet Krocheski Rev. Alphonse Kubat † Kathryn Kubinski Eunice Kuehn Kathryne Kuhns Suzanne Laddusire Joseph and Teresa Lahti Stewart † and Kathleen Laird Carlo and Virginia LaManna Louis and Loretta Langer Phyllis Langfield Robert † and Maureen Lannan James and Barbara Larkin † Robert and Florence Larkin † Peter and Mary Larsen Philip LaVelle † Maurice and Alice Leuthner Diane Liemandt-Reimann and Ron Reimann James and Eleanor Lyons † Daniel † and Jean MacDonald Sheila MacDonald † Daniel and Penny Malecha Catherine Marien † Barbara Martin John and Dorothy Matschi † Lawrence † and Barbara Matthews Francis and Mary Louise Mayer † Marian McCarty Ebert and Eugene † Ebert Darrel and Glenda McDonald † Rev. Kevin McDonough Hugh McElroy Rosemarie McGiffin Jay McGivern Lawrence and Andrea † McGough Michael and Janet McGough Timothy McGough Dorothy A. McGuire Peter † and Mary McKenna Mary Cullen McKeown and Tom McKeown Michael McNamara and Mary Beth † O'Reilly Richard and Carol McNamara John and Jane McNeill Aida Mendez and Raul Andruet Susan Meneely	M	Norbert and Teresa Krenik Thomas and Janet Krocheski Rev. Alphonse Kubat † Kathryn Kubinski Eunice Kuehn Kathryne Kuhns Suzanne Laddusire Joseph and Teresa Lahti Stewart † and Kathleen Laird Carlo and Virginia LaManna Louis and Loretta Langer Phyllis Langfield Robert † and Maureen Lannan James and Barbara Larkin † Robert and Florence Larkin † Peter and Mary Larsen Philip LaVelle † Maurice and Alice Leuthner Diane Liemandt-Reimann and Ron Reimann James and Eleanor Lyons † Daniel † and Jean MacDonald Sheila MacDonald † Daniel and Penny Malecha Catherine Marien † Barbara Martin John and Dorothy Matschi † Lawrence † and Barbara Matthews Francis and Mary Louise Mayer † Marian McCarty Ebert and Eugene † Ebert Darrel and Glenda McDonald † Rev. Kevin McDonough Hugh McElroy Rosemarie McGiffin Jay McGivern Lawrence and Andrea † McGough Michael and Janet McGough Timothy McGough Dorothy A. McGuire Peter † and Mary McKenna Mary Cullen McKeown and Tom McKeown Michael McNamara and Mary Beth † O'Reilly Richard and Carol McNamara John and Jane McNeill Aida Mendez and Raul Andruet Susan Meneely
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S	Gerald and Kathleen Meyer Doug and Sandy Milroy Luther and Gertrude Moen † Kathryn Doyle Mooney Sally Moran and Raymond Wey Rodger † and Marjorie Mountain Barbara Mulcahy Harold and Bernice Mullen James and Franchelle Mullin Sr. Katherine Mullin, VHM Richard Mullin and Mary Joanne Henry William † and Chouhei Min Mullin Catherine Grace Murphy † William Murphy Martin Newell † Timothy Nichols Mickey Nickelson Robert † and Helen Nicklaus F. Gerald and Monica Nilles Gregory and Kunthida Novak Rev. Robert C. Nygaard Kay O'Brien Bunker † Richard and Suzanne Opitz Phil and Connie Paquette Rev. William Paron Harold and Wendy Parsons Robert and Rita Peichel Wayne and Patricia Pelzel Warren † and Rachel Pennig Valeria Pezzani † Henry and Dorothy Piché † LeRoy † and Cecilia Piché Mildred Pike † Ron Plante Terrance Plante † Arthur Popehn Rev. Francis Pouliot Robert † and Dorothy Prax Alexander † and Caroline Puzak George † and Anne Raiche Fred Ranallo † Arnold † and Deanna Rasmussen John and Eleanor † Steichen William and Joanne Reiling Drs. James † and Christine Renier John and Eleanor Reusch † Richard and Dorothy Revord † Br. William Rhody, F.S.C. † Gerald and Diane Riebel	S	Gerald and Kathleen Meyer Doug and Sandy Milroy Luther and Gertrude Moen † Kathryn Doyle Mooney Sally Moran and Raymond Wey Rodger † and Marjorie Mountain Barbara Mulcahy Harold and Bernice Mullen James and Franchelle Mullin Sr. Katherine Mullin, VHM Richard Mullin and Mary Joanne Henry William † and Chouhei Min Mullin Catherine Grace Murphy † William Murphy Martin Newell † Timothy Nichols Mickey Nickelson Robert † and Helen Nicklaus F. Gerald and Monica Nilles Gregory and Kunthida Novak Rev. Robert C. Nygaard Kay O'Brien Bunker † Richard and Suzanne Opitz Phil and Connie Paquette Rev. William Paron Harold and Wendy Parsons Robert and Rita Peichel Wayne and Patricia Pelzel Warren † and Rachel Pennig Valeria Pezzani † Henry and Dorothy Piché † LeRoy † and Cecilia Piché Mildred Pike † Ron Plante Terrance Plante † Arthur Popehn Rev. Francis Pouliot Robert † and Dorothy Prax Alexander † and Caroline Puzak George † and Anne Raiche Fred Ranallo † Arnold † and Deanna Rasmussen John and Eleanor † Steichen William and Joanne Reiling Drs. James † and Christine Renier John and Eleanor Reusch † Richard and Dorothy Revord † Br. William Rhody, F.S.C. † Gerald and Diane Riebel
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T	Most Rev. John Roach, D.D. † Dorothy and Robert Roth John † and Carol Rueb Margaret Ryan † Rev. Patrick Ryan Robert and Mary † Sahli Robert † and Kathleen Sather M. Scott and Ellen Sayer James and Mary Schacker Roger and Irma Scherer Bernadine Schmidt Rev. George Schmit, Jr. Ronald and Nadine Schoenborn Robert and Marianne Schoenecker Marguerite Schoengart Ranee and William Schouviller Elizabeth Schreiner † Mary Schubert Ed and Mary † Schumacher Steven Schuster Peter † and Ann Schweitzer Kenneth Scully † Thomas and Janice Segar James and Lucia Seidel Greg and Sara Seifert David and Patricia Serreyn Dr. Gregory M. Sheehan John Shrake † Mark Shrake Rev. Leonard Siebenaler Nicholas and Susan † Simons Rev. Robert Sipe Brien Slawik and Monika Strom Harold and Sharon Slawik Jerome and Delores Slawik Rev. Stanley V. Sledz George and Jeanne Slipka † Ronald and Mary Smith Stanley and Gladys Sommers † Robert and Lucille Speeter † Rev. Msgr. Stanley Srncac † John and Nan Steger John and Eleanor † Steichen Agnes Stensby Florian Sterner Mark and Lee Ann Sticha William † and Anne Stocks Gertrude Stoltz † Clara Storms †	T	Most Rev. John Roach, D.D. † Dorothy and Robert Roth John † and Carol Rueb Margaret Ryan † Rev. Patrick Ryan Robert and Mary † Sahli Robert † and Kathleen Sather M. Scott and Ellen Sayer James and Mary Schacker Roger and Irma Scherer Bernadine Schmidt Rev. George Schmit, Jr. Ronald and Nadine Schoenborn Robert and Marianne Schoenecker Marguerite Schoengart Ranee and William Schouviller Elizabeth Schreiner † Mary Schubert Ed and Mary † Schumacher Steven Schuster Peter † and Ann Schweitzer Kenneth Scully † Thomas and Janice Segar James and Lucia Seidel Greg and Sara Seifert David and Patricia Serreyn Dr. Gregory M. Sheehan John Shrake † Mark Shrake Rev. Leonard Siebenaler Nicholas and Susan † Simons Rev. Robert Sipe Brien Slawik and Monika Strom Harold and Sharon Slawik Jerome and Delores Slawik Rev. Stanley V. Sledz George and Jeanne Slipka † Ronald and Mary Smith Stanley and Gladys Sommers † Robert and Lucille Speeter † Rev. Msgr. Stanley Srncac † John and Nan Steger John and Eleanor † Steichen Agnes Stensby Florian Sterner Mark and Lee Ann Sticha William † and Anne Stocks Gertrude Stoltz † Clara Storms †
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V	Robert and Anne Strachota JoAnne Streich † Marilyn and Michael Sullivan Carol Swanson Steven Szarke Gerald † and Bernice Tacheny Dr. Joseph † and Mary Thul Rev. Michael Tix Leonard and Lois Tracy † Michael and Michele Traeger Margaret Turner † Donald and Jolene Twombly Bernard and Kathleen Vagnoni † Lawrence and Suzanne Vanden Plas Roger and Lynn Vasko Pete Vestol † Nancy Villwock William † and Barbara Wagner Yvonne Wagner † Charles and Denise Waletzko Donald and Mary Waletzko Rev. Msgr. John Ward † Marlys Weber Rob and Mary Weber William Wegscheider † Jerome † and Mary Ann Weigenant Don † and Arlene Welbes Gene and Ivalea † Wendlandt Albert and Mildred Wesely † Thomas and Gloria Wesely Robert and Mary Wesslund † Carol Whaley Judith Whitacre George and Dorothy White † Kathleen Wichmann Richard † and Sunny Wicka Angela Widi † Martha Wiggins † Theresa Wilkes Rose Williams Steven and Lynn Wolf Daniel Wolfe and Carol Frey Wolfe Rev. Richard Wolter † Genevieve Woods † Rev. Msgr. Robert Wyffels † Alma Young † Richard Zarneke Germaine Zeglin † Leonard † and Irene Zvanovec	V	Robert and Anne Strachota JoAnne Streich † Marilyn and Michael Sullivan Carol Swanson Steven Szarke Gerald † and Bernice Tacheny Dr. Joseph † and Mary Thul Rev. Michael Tix Leonard and Lois Tracy † Michael and Michele Traeger Margaret Turner † Donald and Jolene Twombly Bernard and Kathleen Vagnoni † Lawrence and Suzanne Vanden Plas Roger and Lynn Vasko Pete Vestol † Nancy Villwock William † and Barbara Wagner Yvonne Wagner † Charles and Denise Waletzko Donald and Mary Waletzko Rev. Msgr. John Ward † Marlys Weber Rob and Mary Weber William Wegscheider † Jerome † and Mary Ann Weigenant Don † and Arlene Welbes Gene and Ivalea † Wendlandt Albert and Mildred Wesely † Thomas and Gloria Wesely Robert and Mary Wesslund † Carol Whaley Judith Whitacre George and Dorothy White † Kathleen Wichmann Richard † and Sunny Wicka Angela Widi † Martha Wiggins † Theresa Wilkes Rose Williams Steven and Lynn Wolf Daniel Wolfe and Carol Frey Wolfe Rev. Richard Wolter † Genevieve Woods † Rev. Msgr. Robert Wyffels † Alma Young † Richard Zarneke Germaine Zeglin † Leonard † and Irene Zvanovec
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THE LESSON

“Everything we have is a blessing. Understanding that leads to gratitude.”

Passing Along Faith and Blessings with a Grateful Heart

“I’ve lived many places and done many things,” is Jay Ward’s answer when asked where he’s from. It’s an accurate response. At the age of seven, Jay was adopted by loving parents who raised him in Florida. After graduating from the U.S. Naval Academy, he took part in Operation Desert Storm in Iraq. Jay left the military as a lieutenant and parlayed his engineering degree into a business career that has spanned nearly 30 years, taking him around the world as he climbed the ranks from plant manager to his current position as CEO at Quadion LLC., better known as Minnesota Rubber and Plastics.

Jay is also a family man. Two years after he and his wife Lisa married, they adopted five brothers from Siberia, ages 4 to 14, then went on to have five more children. Now Jay and Lisa live in Prior Lake with their three youngest. On top of his work and family commitments, Jay makes time to serve on the board of directors for St. Paul’s Outreach, which ministers to college students, and he’s the board chair at Chesterton Academy where his children attend high school.

FAITH AND TRUST LEAD TO GIVING

While Jay is constantly on the move, he is firmly grounded by his faith, for which he credits his parents. “Both passed away when I was in college, but they were truly incredible people,” Jay recalls. “My father was one of the first permanent deacons in Florida and was very active in prison ministry. He was an amazing example for me.”

Jay and Lisa have endeavored to instill in their children a love of faith and a commitment to generosity. And as parents, they have been inspired by their children’s generous hearts. “Our goal was to convey to our children that God loves them and that everything we have is a blessing,” Jay explains. “Understanding that leads to gratitude.”

Jay is nothing if not grateful. “It’s almost comical, some of the blessings we’ve had,” he muses. As a business executive, Jay has experienced the rollercoaster-type rewards of the private equity world. “I’ve been lucky,” he admits. “Although, I know it’s not luck — it’s a God thing.”

Opening a donor advised fund at the Catholic Community Foundation of Minnesota (CCF) enabled Jay and Lisa to more closely align giving with their Catholic identity. “Anything that supports the Holy Church is great,” Jay says. Through the fund, Jay and Lisa support the organizations and causes most important to them, such as Catholic education at Chesterton Academy, the evangelical work done by St. Paul’s Outreach, several organizations that promote pro-life activities, Pro Ecclesia Sancta, and their parish, Holy Family in St. Louis Park.

In addition to being informed by the Gospel, Jay says that Lisa taught him a simple theme: be generous and trust God. “Do I want to save up and have everything in the silos for all the things that might happen, or am I willing to trust in God?” he asks. “I’m not always great at that so I don’t want to sound like I’m preaching,” he adds. “But, really, the ultimate goal is to give everything away.” ●

Endowed Funds

An endowed fund is a permanent gift that will provide a perpetual source of funding to designated charities or charitable causes. With an endowed fund, charitable giving lives on for countless generations. Anyone can create an endowed fund at the Catholic Community Foundation to support causes near to their heart.

Bolded fund names indicate funds established in fiscal year 2019.

A	Annunciation Parish Endowment Fund, Minneapolis		Friends of Catholic Urban Schools Endowment Fund		Lyons Family Tuition Assistance Endowment Fund		Donald and Veronica Poquette Charitable Endowment Fund	
	Archdiocesan Venezuelan Mission Endowment Fund		Robert F. and Clara M. Fulton Foundation Endowment Fund		Catherine O'Connor Marien Legacy Endowment Fund		Preaching and Presiding Institute Endowment Fund	T
B	Severne M. Banack Endowment Fund	G	Gainor Endowment Fund		Mary Mother of God Endowment Fund, Duluth		Priests Continuing Education Endowment Fund	
	Benilde-St. Margaret School Endowment Fund, St. Louis Park		Msgr. Francis J. Garvey Endowment Fund		Burt and Patricia McGlynn Family Scholarship		Priests Retirement Endowment Fund	
	Blessed Virgin Mary Charitable Endowment Fund		Richard and Delphine Goldstrand Charitable Endowment Fund		Endowment Fund	R	Rauenhorst Family Scholarship Endowment Fund	
	Harold and Patricia Boerboom Priests Retirement Endowment Fund		Good Shepherd School Education Endowment Fund, Golden Valley		O. Bernard and Dorothy Ann McGuire Tuition Assistance		William and Joanne Reiling Endowment Fund	V
	Jerome J. Brown Endowment Fund		Tom and Joleen Greene Family Endowment Fund		Endowment Fund for St. Mark School, St. Paul		Carl J. Remick Jr. Endowment Fund	
	Brown-Mountain Family Advised Endowment Fund		John and Patricia Gries Endowment Fund		Donald and Bernice Messerich Family Charitable		Jim and Chriss Renier Scholarship Endowment Fund	W
	Rev. John H. Brunner Charitable Endowment Fund		Growing in Faith Endowment Fund		Endowment Fund		Respect Life Program Endowment Fund	
	Brya Family Endowment Fund		Guest House Endowment Fund		Milroy Family Designated Endowment Fund		Richard G. and Dorothy E. Revord Family Charitable	
	Robert and Dolores Buril Endowment Fund		Guild of Catholic Women Endowment Fund		Phillip and Barbara Milroy Cathedral School Scholarship		Endowment Funds	
	Burns Family Charitable Endowment Fund	H	Haug Family Endowment Fund for Catholic Teachers and		Endowment Fund, Superior, WI		Cole Richardson Endowment Fund	
	Vivian M. Byers Endowment Funds for Education		Religious Education Directors		Ministerial Enrichment Endowment Fund		Most Rev. John R. Roach Endowment Fund	
C	Carondelet Life Care Ministries Endowment Fund		Haug Family Endowment Fund for Tuition Support of		Missionary Sisters of St. Peter Claver Endowment Fund	S	Sacred Heart Fraternity of Secular Franciscan	
	Connie D. and William C. Carroll Scholarship Endowment Fund		Elementary Schools		Molz Family Endowment Fund		Endowment Fund	
	Cathedral Foundation Endowment Fund		Hazel C. Heim Endowment Fund		Kathryn Mooney Endowment Fund for		George and Evelyn Sayer Scholarship Endowment Fund for	
	Catholic Youth Camp Endowment Fund		Jack and Barbara Hessburg Charitable Endowment Fund		Annunciation Church, Minneapolis		St. John the Baptist, Excelsior	
	Center for Mission Endowment Fund		Msgr. Patrick J. Hessian Endowment Fund		Kathryn Mooney Endowment Fund for		Ronald and Nadine Schoenborn Endowment Fund	
	Cerenity-Marian Center of St. Paul Catholic Service to the		Earl and Kathy Hoagland Sacred Manoomin Endowment Fund		Basilica of St. Mary, Minneapolis		Kenneth W. Scully Endowment Fund	
	Elderly Endowment Fund		Dcn. Gary and Jacqui Hoffman Scholarship Endowment Fund for		Kathryn Mooney Endowment Fund for Catholic Charities		Seifert Family Endowment Funds	
	Joseph and Fern Check Legacy Endowment Fund		Chesterton Academy, Edina		Kathryn Mooney Endowment Fund for		David and Patricia Serreyn Endowment Fund	
	Community Priorities Endowment Fund		Dcn. Gary and Jacqui Hoffman Scholarship Endowment Fund for		St. John Vianney Seminary		Dr. Gregory Sheehan Scholarship Endowment Fund	
	Conzemius Endowment Fund for Cretin-Derham Hall		St. John the Baptist, Excelsior		Kathryn Mooney Endowment Fund for		Sisters of the Good Shepherd Endowment Fund	
	Mary Ellen Priebe Conzemius Endowment Fund		Thomas and Patricia Holloran Catholic Charities Endowment Fund		St. Olaf Catholic Church, Minneapolis		Skipper Slawik Endowment Fund	
	Cora Cooty Endowment Fund		Rev. Leo Huber Charitable Endowment Funds		Kathryn Mooney Endowment Fund for St. Stephen		Rev. Henry J. Sledz Endowment Fund for New City Ministry	
	Rev. Francis Costiou, OMI Memorial Endowment Fund		Hurley Family Caritas Endowment Fund		Church, Minneapolis		Slipka Family Charitable Endowment Fund	
	Crosier Fathers and Brothers Endowment Fund	I	Immaculate Conception Church Endowment Fund,		W. Edward Mullin and Mary Hester Mullin Charitable		George and Jeanne Slipka Charitable Endowment Fund	
			Columbia Heights		Endowment Fund		Spiritual Formation of Catholic School Teachers	
D	Demontreville Jesuit Retreat House Endowment Fund		Immaculate Heart of Mary School Tuition Assistance		Catherine G. Murphy Endowment Fund for Catholic Charities		Endowment Fund	
	Diaconate Educational Assistance Endowment Fund		Endowment Fund, Minnetonka		Catherine G. Murphy Endowment Fund for St. Paul Seminary		St. Catherine University Endowment Fund	
	William C. and Corinne J. Dietrich Charitable Endowment Funds				Catherine G. Murphy Endowment Fund for St. Thomas More		St. John School Endowment Fund, Little Canada	
	Maureen Dolan Jurek Charitable Endowment Fund	J	Jeffery Paul Johnson Memorial Endowment Fund		Church, St. Paul		St. John the Evangelist Tuition Assistance Endowment Fund,	
	Edward and Margaret Dudley Memorial Endowment Fund	K	Margaret D. Kane Endowment Fund				Little Canada	
E	Elder Family Endowment Fund		Sr. Brenda Kelzer Scholarship Endowment Fund		N	Nativity of Our Lord Endowment Funds, St. Paul	St. John Vianney Seminary Endowment Fund	
	Marilou Eldred, Ph.D. Legacy Endowment Fund		Abigail Kiesner Endowment Fund for Advancement of		Nazareth Hall Endowment Funds		St. Joseph Parish Endowment Fund, West St. Paul	
	Estrem Family Endowment Fund		Professional Women		Newman Center University Christian Studies		St. Joseph's Home for Children Endowment Fund	
F	Family of Faith Catholic Charities Endowment Funds		Klutzke Family Values Endowment Fund		Endowment Fund		St. Mark Scholarship Endowment Fund, St. Paul	
	Family of Faith Education Assistance Endowment Fund		Dr. Ellsworth and Mae F. Kneal Endowment Fund		Nilles Family Endowment Fund		St. Michael Church Endowment Fund, Stillwater	
	Family of Faith General Endowment Fund		Elaine and Allen Kolles Endowment Fund		Alex and Loretta Novak Family Endowment Fund		St. Michael Religious Education Endowment Fund, Stillwater	
	Family of Faith Religious Education Endowment Funds	L	Carlo J. LaManna Family Scholarship Endowment Fund for		Our Lady of Good Counsel Endowment Fund	O	St. Paul Seminary Endowment Fund	
	Family of Faith Support and Education for Priests Endowment Fund		St. Paul Seminary		Our Lady of Peace Education		St. Paul's Outreach Endowment Fund	
	Family of Faith Tuition Assistance Endowment Funds		Carlo J. LaManna Family Scholarship Endowment Fund for		Endowment Fund, Minneapolis		St. Peter School Tuition Assistance Endowment Fund,	
	Raymond and Genevieve Feltl St. Joseph Church		Tuition Assistance		Our Lady of Peace Home Endowment Fund	P	North St. Paul	
	Endowment Funds, Hopkins		Lannan Family Endowment Fund for St. Thomas Academy		Phil and Connie Paquette Charitable Endowment Fund		St. Peter Claver Tuition Aid Endowment Fund, St. Paul	
	Fleming Family Charitable Endowment Fund		Fr. Patrick Lannan Endowment Fund		Fr. William J. Paron Endowment Fund		St. Rose of Lima Tuition Assistance	
	Florence A. Florance Scholarship Endowment Fund for		Robert E. and Florence D. Larkin Charitable Endowment Fund		Patrons of St. Anne School Endowment Fund, Le Sueur		Endowment Fund, Roseville	
	Academy of Holy Angels		Philip P. LaVelle Charitable Endowment Fund		Valeria Pezzani Endowment Funds		St. Thomas Academy Endowment Fund	
	Florence A. Florance Scholarship Endowment Fund for		Lenzmeier Family Endowment Fund		Piché Family Endowment Fund		St. Thomas Aquinas Catholic School Endowment Fund,	
	DeLaSalle High School		Clara Hill Lindley Clergy Endowment Fund		Anthony and Melva Pierce Endowment Fund		International Falls	
	Archbishop Flynn Legacy of Faith Endowment Fund		Erasmus C. Lindley Charitable Endowment Fund		Arthur J. Popehn Family Foundation Endowment Fund			

Investing and Grantmaking with a Catholic Heart

The Catholic Community Foundation of Minnesota (CCF) has a history of earning healthy returns on its investments — but high returns aren't CCF's only goal. Catholic values and a desire to achieve the greatest good are at the heart of every investment CCF makes and every grant check CCF writes.

“We work hard to ensure that funds entrusted to us are invested in organizations whose business practices align or aren't in conflict with Catholic teachings,” says CCF President Anne Cullen Miller. “We take that commitment very seriously.”



FULFILLING THE PROMISE OF FAITH-BASED INVESTMENT STRATEGIES

Putting into practice the Socially Responsible Investment Guidelines recommended by the United States Conference of Catholic Bishops (USCCB) has been a deliberate, evolutionary process at CCF. As of 2019, all three USCCB strategies for principled stewardship — Do No Harm, Active Corporate Participation, and Promote the Common Good — are fully reflected in our faith-consistent investment practices.

1. Do No Harm: “It only makes sense to make investments that are consistent with Catholic social teaching,” says CCF Investment Committee Chair, Julie Gerend. In addition to overseeing investments and manager selection, Julie’s committee is charged with ensuring that CCF investments don’t support things antithetical to Catholic values — such as abortifacients, weapons production, predatory lending, or gambling.

“CCF has really been at the forefront of investment screening,” says Sam Saladino, founder and Managing Director of IWP Capital, LLC, who has provided investment screening and consulting services to CCF for more than eight years.

2. Active Corporate Participation: As the funds under CCF management have grown, so has CCF’s ability to influence corporate responsibility. “Simply buying a Catholic-screened fund isn’t enough for us,” says Anne. “We have a responsibility to do more.”

In 2019, CCF again called upon IWP Capital, LLC — a firm that has voted more than \$3.5 billion in Catholic values proxies — in order to be a more active shareholder and more involved in corporate engagement efforts which include letter writing and ongoing discussions.

“We enlist researchers and partners in investment screening and shareholder advocacy, but remain actively involved in bringing faith-based perspectives to corporate engagement,” says Anne.

3. Promote the Common Good: Since 2018 CCF has been full-heartedly fulfilling Pope Francis’s vision of “putting the economy at the service of people” with impact investments. Currently, CCF invests approximately \$9 million — or roughly 2 percent of its portfolio — in local, national, and global funds that yield a fiscal return while promoting the common good.

In 2019, those funds included two affordable housing organizations, CommonBond Communities and Jonathan Rose Companies, as well as Ascension Investment

Management, a global impact fund that provides access to medical care in Africa, and energy solutions in rural South America.

“We’re very excited about generating profits with purpose and investing for the common good,” says Julie. “We’ve proven we can be fiscally responsible while making a difference in the world.”

“We’re very excited about generating profits with purpose and investing for the common good. We’ve proven we can be fiscally responsible while making a difference in the world.”
— Julie Gerend, CCF Investment Committee Chair



No matter where a grant comes from, the organization or cause it goes to will be thoroughly screened. That’s been true since CCF was founded and will remain true in perpetuity, thanks in no small part to our grantmaking guidelines.

GUIDELINES FOR GRANTMAKING THAT CAN STAND THE TEST OF TIME

Whether a grant comes from a donor advised fund, endowed fund, institutional endowed fund, or an unrestricted fund, the organization or cause it goes to will be thoroughly screened. That’s been true since CCF was founded and will remain true in perpetuity, thanks in no small part to our grantmaking guidelines.

Last year, in an effort to continuously improve CCF’s grantmaking, the Grants Committee reached out to Catholic community and family foundations locally and nationwide to find out what guidelines they were using to screen grantees.

“We were somewhat surprised to find out that CCF was pretty far ahead of the game in terms of performing due diligence,” says Grants Committee Chair Emery Koenig. “Very few organizations had formal processes in place.”

A notable exception was Foundations and Donors Interested in Catholic Activities (FADICA), an organization whose members share CCF’s interest in applying Catholic principles to grantmaking.

FADICA members, too, were interested in exploring how Catholic donors can pass down their faith-aligned philanthropy to future generations — even if future generations aren’t connected to the Catholic faith tradition.

“CCF sparked new thinking on these questions,” says Alicia Bondanella Simon, director of membership for FADICA. “They helped generate ideas for resources that may benefit Catholic community and family foundations for generations to come.”

CCF’s revised grantmaking guidelines are already making a difference. Earlier this year, Chris Nelson, CCF’s vice president of development and donor engagement, was able to alert a long-time CCF donor advisor that one of the healthcare organizations he’d been supporting for years had recently begun advocating for access to abortions as a healthcare right.

“We’re not interested in naming or shaming organizations or publishing a list of ‘wrongdoers,’” says Chris. “We will, however, alert individual donors when a charity implements a policy or program antithetical to the teachings of our Church.” ●

Donor Advised Funds

A donor advised fund is a simple, flexible account that allows you to make gifts, receive immediate tax benefits, and then recommend grants on your own timeline. Donor advised funds can be used to plan giving annually and throughout your lifetime.

Bolded fund names indicate funds established in fiscal year 2019.

A	Abele Family Charitable Fund	E	Douglas M. and Kathleen A. Eiden Fund	L	Kunkel Family Charitable Fund	S	Roessler Family Fund	T	Fr. Ralph Talbot Fund
	ABPI Fund		Alfred O. and Mary A. Elder Charitable Fund		Kevin and Maureen Lahr Fund		John and Carol Rueb Fund		Tautges Family Fund
B	Jo and Gordon Bailey Family Fund	F	Charitable Fund	J	Stewart W. and Kathleen M. Laird Charitable Fund	U	Madonna Russo Charitable Fund	V	Telep Family Charitable Fund
	Mike Bangasser Family Charitable Fund		Marilou and Don Eldred Charitable Fund		Donor Advised Fund		Ryan Family Fund		Tholkes Family Charitable Fund
	International Beddor Fund		Enestvedt Family Charitable Fund		Carlo LaManna Fund		Sayer Family Foundation Fund		Jeanne Thomas Charitable Fund
	William Belkengren Charitable Fund		Greg and Beth Engel Fund		Lang Family Charitable Fund		Ellen and Scott Sayer Charitable Fund		Tiffin Family Fund
	Beranek Family Fund		F. M. Farrell Family Fund		David Lano Foundation Fund		John E. and Carole A. Sayer Charitable Fund		Tinuucci Family Charitable Fund
	Antonio and Cecilia Bernardi Charitable Fund		Fatima Charitable Fund		Laughery Family Fund		James C. and Mary E. Schacker Charitable Fund		John and Bonnie Treacy Family Fund
	John and Cynthia Beuerlein Family Fund		Finley Family Fund		Robert L. Lee and Mary E. Schaffner Charitable Fund		Scherer Family Fund		Jeff and Susan Turner Fund
	Bott Family Charitable Fund		Archbishop Harry J. Flynn Charitable Fund		Regina M. LeMay Charitable Fund		Gary and Carolyn Scherer Fund		Twomey/Lord Charitable Fund
	Michael and Dolores Boyle Family Charitable Fund		M. and M. Flynn Charitable Gifting Fund		Lentz Family Fund		Georganne and Kristopher Scherer Family Fund		Underwood Sullivan Advised Fund
	Bradley Family Godshare Fund		Peter and Mary Jo Forrest Family Fund		Letscher - Glancy Family Fund		Brian and Michelle Murray Charitable Fund		Utoft Charitable Fund
	John F. Brandes Fund		Francis of Assisi Fund		Morrie and Alice Leuthner Charitable Fund		Musech Family Charitable Fund		Joseph and Nancy Utoft Charitable Fund
	Brennan Family Charitable Fund		Francois Family Charitable Fund		Nangle/Naphin Family Fund		Musch Family Charitable Fund		Vanden Plas Family Funds
	Peter and Maura Brew Family Fund		Franske Family Fund		Liemandt Family Fund		Jesse and Jessica Nelson Charitable Fund		Gary and Sheri Vasko Family Fund
	Bruski Family Charitable Fund		Dennis and Barbara Frederick Family Fund		Logan Family Fund		Bernadine E. Schmidt Charitable Fund		J and J Vierling Family Fund
	Florian J. and Dorothy M. and Thomas L. Busch Charitable Fund		French Family Charitable Fund		Richard and Jean Lynch Fund		Stephen and Carrie Schmitz Fund		Bryan and Kimberly Volk Family Fund
	Canto Family Fund		Eugene U. and Mary F. Frey Fund		Fr. Stan Mader Fund		Marjorie J. Schneider Charitable Fund		Wagner Family Charitable Fund
	Fred and Molly Commers Fund		Friends of East Africa Fund		Ernie and Susan Maier Fund		James and Jan Schueppert Family Fund		Ward Family Fund
	Norbert and Mary Ellen Conzemius Fund		Furness Family Fund		Maley Family Fund		Schuster Family Charitable Fund		Warner Family Fund
	Cook Family Charitable Fund		John and Emily Gainor Family Fund		Mannix Family Fund		Casey and Susan Scott Charitable Fund		Waterfall Fund
	Kathleen Cooney and Robert LaBombard Family Fund		Gazelle Legacy Fund		Joseph D. and Patricia Kalil Margarit Family Fund		Opus Prize Foundation Fund		Jerry and Mary Welle Family Fund
	Cress Family Fund		Gary and Joan Geurts Fund		Thomas R. and Catherine R. Johnson Fund		Segar Family Fund		Wenger Family Charitable Fund
	James Crow and Mary Quinn Crow Fund		Gleason Family Fund		Thomas and Shirley Jungels Family Fund		Our Lady of the Lake Fund		James Wicker Fund
	James and Mary Crowley Fund		God's Gift Through S and G Fund		JM Joos Fund		Greg and Sara Seifert Charitable Fund		Wier Family Fund
	Hugh and Melissa Cullen Family Fund		Michael and Susan Gores Family Fund		Gregory and Michelle Keeley Family Fund		P and R Charitable Fund		Wingerd Family Charitable Fund
	Cunningham Family Fund		Tom and Joleen Greene Family Charitable Fund		Thomas and Helen A. Masica Family Fund		Karen and Patrick Shrake Charitable Fund		Michael and Pamela Wold Fund
	Michele and Michael Darger Fund		Tom and Joleen Greene Family Charitable Fund		Mary Lou Mathiowetz Charitable Fund		Palen Family Foundation		Steve and Lynn Wolf Fund
	Tony and Jennifer DelDotto Fund		Harwood Family Fund		Marjorie Mathison Hance Charitable Fund		Robert and Margaret Simmet Family Fund		Woodlawn Avenue Fund
	Deo Gratias Fund		Patrick and Sally Gruber Charitable Fund		John J. and Mary Anne T. Mauriel Charitable Fund		Thomas W. and Rebecca E. Sinner Fund		Wyatt Family Fund
	Russell Dickinson Celebrate Life Fund		Grundtner Family Charitable Fund		John J. and Mary Anne T. Mauriel Charitable Fund		Thomas W. and Rebecca E. Sinner Fund		Jon and Kalley Yanta Family Fund
	Diekmann Family Charitable Fund		Guardian Angels Fund		McCloughan Family Fund		H. William and Molly Park Family Fund		Young / Sassie II Fund
	Dienhart Family Fund		Dan and Colette Hagen Family Fund		McElroy Christian Youth Ministry Fund		Harold and Sharon Slawik Fund		Richard D. Zarneke Charitable Fund
	Divine Mercy Charitable Fund		Haik Family Charitable Fund		Andrea and Larry McGough Charitable Fund		Harold and Wendy Parsons Fund		Edward C. and Marie C. Zech Fund
	Morgan and Celine Donohue Family Fund		Halbur Family Fund		McGrath Family Fund		Jerome and Delores Slawik Fund		Marjorie Zeug Charitable Fund
	Adam and Kenna Dooley Family Fund		Juli and Paul Halverson Fund		Mary Cullen McKeown Charitable Fund		Robert and Diane Slayton Fund		
	Duc in Altum Funds		Jean Hammar Charitable Fund		John D. and Jane A. McNeill Family Donor Advised Fund		Small Things Fund		
	Edward and Margaret Dudley Family Charitable Fund		Harrington Family Fund		John D. and Jane A. McNeill Family Donor Advised Fund		Ronald and Mary Smith Charitable Fund		
	DuFresne Family Charitable Fund		Harwood Family Foundation		Kay Mellon Fund		MCJ Snyder Charitable Fund		
			Mark Hazzard and Sharon Simonson Charitable Fund		Melsen Family Charitable Funds		Greg and Emmy Springer Family Charitable Fund		
			Healy Family Charitable Fund		John and Patrice Menard Family Fund		St. Clare Charitable Fund		
			Robert and Mary Healy Family Fund		Ted and Laura Merriam Family Fund		St. Francis Fund		
			Heimerman Family Charitable Fund		Merrill Family Charitable Funds		St. Jerome Catholic School Fund		
			Jack and Barbara J. Hessburg Fund		MGR Fund		St. Maximilian Kolbe Fund		
			Hickok Family Fund		Bill and Julie Mikkelsen Fund		St. Richard's Fund		
					Mark Miller and Anne Cullen Miller Fund		John and Margaret Staiger Family Fund		
							R and M Stark Fund		
							Stenlund Family Foundation		
							Sticha Family Charitable Fund		
							Denise Stibal Charitable Fund		
							Stocks Family Fund		
							Mary and Steve Stolz Fund		

Legacy Fund

The Legacy Fund enables the Catholic Community Foundation to respond to emerging or urgent, unmet needs in our community. We are grateful for these donors who have committed gifts to the Legacy Fund and invite you to join them in strengthening our community now and forever.

Bolded names denote donors who made a gift to the Legacy Fund in fiscal year 2019 for the first time.

The † symbol denotes Legacy Fund donors who have passed. Please hold them in your thoughts and prayers.

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Glynn Behmen
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James and Georgine Benoit
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- Kathleen Yung
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- Richard Zarneke
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THE LEGACY FUND

is a strong philanthropic force that will benefit Catholics for generations to come.

Endowing the Heart of a Parish Community

Founded in 1960, the St. Odilia Catholic Community was originally led by the Crosiers, a religious order that believes strongly in lay leadership. At the request of the Archbishop, St. Odilia parishioners worked together to build a school and then a church. Nearly 30 years after the parish was established, parishioners were moved to establish an endowment that could support their parish and school in perpetuity.

The parish community created an Endowment Fund Advisory Committee to oversee the growth and stewardship of the fund. “Long-term successful endowments have lay leaders that champion the efforts,” says Chris Nelson, vice president of development and donor engagement at the Catholic Community Foundation of Minnesota (CCF).

Having researched the successes and failures of the few parishes that had attempted to establish a similar fund, it became immediately clear to the St. Odilia endowment committee that giving an endowment time to grow was essential.

“We decided to make no distributions of any kind until the fund reached \$500,000,” says Sharon Hicks, one of the founding members who recently retired from the endowment committee after 25 years. “We’ve been very fortunate to have pastors who’ve been very supportive of our efforts.”

FUNDRAISING WITH HEART

Parish Administrator Jeanne Schaaf says Roger Toogood played a major role in growing the endowment. He was no stranger to fundraising, having served as the executive director of the Children’s Home Society of Minnesota for 27 years — and he knew that nobody gave to the unknown.

“I knew there needed to be a heart connection,” says Roger. “We needed to start by finding out what each potential donor loved about St. Odilia — and, show them how their support could help.”

St. Odilia also allows donors to designate specific ministries or areas they’d like their donations to support. “That’s another way of making that heart connection,” says Roger.

In 1995, management of the endowment fund was transferred to the recently established Catholic Community Foundation. The change not only increased the speed at which the parish’s funds grew, it also minimized the bookkeeping responsibilities of an endowment with multiple sub-funds. “We appreciated how CCF’s faith-consistent stewardship matched our parish’s heart too,” says Jeanne.

“We appreciated how CCF’s faith-consistent stewardship matched our parish’s heart too.”
— Jeanne Schaaf, Parish Administrator

THEIR FAITH AND HARD WORK WERE REWARDED

It took another 10 years for the parish to reach its \$500,000 goal and begin making grants to support the work of its various ministries. (The committee had made one \$40,000 grant five years before the goal was reached, honoring St. Odilia’s 40th Anniversary.)

Today, St. Odilia’s endowments are valued at more than \$2.25 million. Since 2005, more than \$936,000 of total distributions have funded projects that met a parish ministry need.

MINISTRY MEMBERS PROVIDE HEARTFELT ADVOCACY

To carry out the mission of St. Odilia, there are nine ministry councils: social justice, worship and community life, facilities, Hispanic leadership circle, stewardship, faith formation, finance, pastoral care, and the school advisory council. A representative from each ministry serves on the Parish Leadership Council.

On the third Tuesday of each month, the 90 parishioners who serve on those ministry councils gather for prayer and a simple soup supper. Then they break into separate groups to discuss issues related to their ministry area — and possible uses of endowment funds. The Parish Leadership Council meets immediately afterward.

Word and enthusiasm about proposed initiatives spreads quickly from the ministry councils to the more than 3,000 parish households, a large percentage of which attend the Annual Endowment Mass and Benefactor Recognition Event.

The community’s commitment to and excitement about the endowment made a favorable impression on Fr. Phillip Rask when he came to St. Odilia in 2007, “I was pleased and surprised by how creatively and collaboratively endowment funds were being used.”

Sharon believes St. Odilia is successful because community members share a genuine passion for their faith and their parish. “We want to ensure that this faith community we know and love will continue to thrive long into the future so that others who follow in our footsteps will be nurtured and blessed as we have been.” ●

Institutional Endowed Funds

An institutional endowed fund is a permanent fund established by an organization to support and sustain its ministries. When an institution invests in a permanently endowed fund at the Catholic Community Foundation, it makes a commitment to ensuring that its mission continues on for future generations.

Bolded fund names indicate funds established in fiscal year 2019.

A Aim Higher Foundation Endowment Fund
Assumption Cemetery Perpetual Care Trust Fund, Richfield
B **Bethlehem Academy Legacy Institutional Endowment Fund, Faribault**
Bethlehem Academy Legacy Scholarship Endowment Fund, Faribault
C Catholic Services Appeal Foundation Endowment Funds
Center for Mission Alfred E. Hauwiller Endowment Fund, St. Paul
Center for Mission Mustard Seed Mission Endowment Fund, St. Paul
Center for Mission Fr. Karl Wittman, Anna Marie Eisenmenger and Odo Reder Endowment Fund, St. Paul
CommonBond Communities Housing Endowment Fund, St. Paul
D Diocese of New Ulm Bishop LeVoor Catholic School Endowment Fund
Diocese of New Ulm Archbishop John C. Nienstedt Catholic Schools Scholarship Fund
F Faithful Shepherd Catholic School Rev. Charles V. Lachowitzer Endowment Fund, Eagan
Franciscan Retreats Endowment Fund, Prior Lake
G Glenn Catholic Senior Communities, Inc. Fund, Minnetonka
Good Shepherd Endowment Funds, Golden Valley
Guardian Angels School Trust Fund, Chaska
Guardian Angels Capital Project Endowment Fund, Oakdale
Guardian Angels Cemetery Endowment Fund, Oakdale
Guardian Angels Arthur Hoff Endowment Fund, Oakdale
Guild Incorporated Endowment Fund, St. Paul
H Holy Family Church Seminarian Endowment Fund, Silver Lake
Holy Name Endowment Fund, Minneapolis
Holy Name of Jesus Church Good Samaritan Funds, Wayzata
Holy Spirit Endowment Fund, St. Paul
Holy Trinity Operating Endowment Fund, South St. Paul
I Immaculate Conception Endowment Fund, Lonsdale
Immaculate Heart Church Endowment Fund, Crosslake
Immaculate Heart of Mary Catholic Charities Endowment Fund, Minnetonka
Immaculate Heart of Mary Faith Formation Endowment Fund, Minnetonka
Immaculate Heart of Mary General Operating Endowment Fund, Minnetonka
Immaculate Heart of Mary Maintenance Reserve Endowment Fund, Minnetonka
Immaculate Heart of Mary Scholarship for IHM Students Endowment Fund, Minnetonka
Incarnation Parish Endowment Fund, Minneapolis
L League of Catholic Women Endowment Fund
M M.T. Hill Archdiocesan Invalid Priests Trust Funds, St. Paul
M.T. Hill Christian Brothers Trust Fund, St. Paul
M.T. Hill Cretin-Durham Hall Trust Funds, St. Paul
Marquette Catholic School Endowment Fund, Virginia

Moto Hope Mission Endowment Fund, Walker
N Nativity of Mary Endowment Trust Fund, Bloomington
Nativity of Mary School Endowment Trust Fund, Bloomington
NET Ministries Alumni Endowment Fund, West St. Paul
NET Ministries Endowment Fund, West St. Paul
New Prague Area Cemetery Fund, New Prague
O Our Lady Cemetery Fund, Grove City
Our Lady of Grace Church Fr. Robert T. Cassidy Scholarship Endowment Fund, Edina
Our Lady of Grace Catholic School Endowment Fund, Edina
Our Lady of Grace Endowment Trust Fund, Edina
Our Lady of the Lake Cemetery Endowment Trust Fund, Mound
Our Lady of the Lake Parish Endowment Trust Fund, Mound
Our Lady of the Lake School Endowment Trust Fund, Mound
Our Lady of the Lakes Perpetual Care Fund, Spicer
Our Lady of Peace Parish Endowment Fund, Minneapolis
Our Lady of the Prairie Parish Endowment Fund, Belle Plaine
P Pacem In Terris Endowment Fund, St. Francis
Pax Christi Community Endowment Fund, Eden Prairie
Presentation of the BVM Grade School Parish Endowment Fund, Maplewood
Presentation Legacy Foundation Fund, Maplewood
R Risen Christ Catholic School - John P. and Mary L. Byron Endowment Fund, Minneapolis
S Ss. Cyril and Methodius Church Dcn. John Matlon Memorial Endowment Fund, Minneapolis
Ss. Joachim and Anne Endowment Fund, Shakopee
Ss. Peter and Paul Parish Education Endowment Fund, Loretto
Ss. Peter and Paul Parish Endowment Fund, Loretto
St. Agnes Parish Pastoral Ministry Fund, St. Paul
St. Agnes School Scholarship Endowment Fund, St. Paul
St. Albert Cemetery Perpetual Care Fund, Albertville
St. Albert the Great Endowment Fund, Minneapolis
St. Aloysius Cemetery Fund, Olivia
St. Alphonsus School Teachers Development Endowment Fund, Brooklyn Center
St. Alphonsus School Tuition Assistance Endowment Fund, Brooklyn Center
St. Ambrose Church Bishop Richard Pates Endowment Fund, Woodbury
St. Anastasia Cemetery Perpetual Care Endowment Fund, Hutchinson
St. Anastasia Endowment Fund, Hutchinson
St. Andrew Parish Religious Education Fund, Montevideo
St. Anne Cemetery Endowment Trust Fund, Hamel
St. Bernard Church Marie Tschida Pranke Scholarship Fund, St. Paul
St. Bridget of Sweden Endowment Fund, Lindstrom
St. Cecilia John Mondati Endowment Fund, St. Paul
St. Croix Catholic School Endowment Fund, Stillwater

St. Croix Valley Faith Formation Endowment Fund, Stillwater
St. Eloi Parish Endowment Fund, Minneota
St. Gabriel the Archangel Affiliated School Endowment Fund, Hopkins
St. Gabriel the Archangel Endowment Fund, Hopkins
St. George Cemetery Endowment Fund, Long Lake
St. Gerard Majella Endowment Fund, Brooklyn Park
St. Helena Endowment Fund, Minneapolis
St. Henry Cemetery Perpetual Care Trust Fund, Monticello
St. Hubert Catholic Community Advisory Fund, Chanhassen
St. John the Baptist Resurrection Cemetery Care and Maintenance Fund, Excelsior
St. John the Baptist Capital Endowment Fund, New Brighton
St. John the Baptist Cemetery Endowment Fund, New Brighton
St. John the Baptist Operating Endowment Fund, New Brighton
St. John the Baptist Pastoral Outreach Ministry Fund, New Brighton
St. John the Baptist Tuition Assistance Fund, New Brighton
St. John the Baptist Cemetery Endowment Fund, Savage
St. John the Baptist Parish Endowment Fund, Savage
St. John the Baptist Parish Endowment for Tuition Assistance Fund, Savage
St. John the Evangelist Tuition Assistance Endowment Fund, Duluth
St. John Neumann Catholic Church Parish Endowment Fund, Eagan
St. Joseph Church Fr. Frank Brunner Endowment Fund, Montevideo
St. Joseph Parish Faith Formation Financial Aid Endowment Fund, Red Wing
St. Joseph Perpetual Parish Endowment Fund, Rosemount
St. Lawrence Catholic Church Endowment Fund, Duluth
St. Louis Church Fr. Paul Morrissey, S.M. in Memory of John Nasseff Endowment Fund, St. Paul
St. Margaret Mary Endowment Fund, Golden Valley
St. Mark Parish Endowment Trust Fund, St. Paul
St. Mark Peller Scholarship Fund, St. Paul
St. Mary Perpetual Care Endowment Fund, Arlington
St. Mary School Endowment Fund, Bird Island
St. Mary Cemetery Fund, Olivia
St. Mary of the Lake Cemetery Perpetual Care Fund, White Bear Lake
St. Matthew Education Endowment Fund, St. Paul
St. Michael Cemetery Perpetual Care Fund, Farmington
St. Michael Designated Endowment Trust Fund, Farmington
St. Michael Cemetery Fund, Milroy
St. Michael Church and School Advisory Fund, Prior Lake
St. Michael Endowment Fund, Prior Lake
St. Nicholas Cemetery Perpetual Care Fund, Carver
St. Nicholas Endowment Fund, Elko New Market
St. Odilia Endowment Fund, Shoreview
St. Odilia Prayer Garden Perpetual Care Fund, Shoreview
St. Odilia School Endowment Fund, Shoreview

St. Olaf Church Dorothy Ellstrom Endowment for Spiritual Enrichment Fund, Minneapolis
St. Olaf Church Endowment Fund, Minneapolis
St. Pascal Baylon Endowment Fund, St. Paul
St. Patrick Building Fund, Inver Grove Heights
St. Patrick Designated Endowment Trust Fund, Inver Grove Heights
St. Patrick Endowment Fund, St. Paul
St. Patrick / St. Francis General Endowment Fund, St. Paul
St. Paul Seminary General Seminary Endowment Fund, St. Paul
St. Paul Seminary Msgr. Ambrose Hayden - Seminary Fund, St. Paul
St. Paul's Monastery Endowment Fund, St. Paul
St. Peter School Endowment Fund, Forest Lake
St. Peter Catholic Church Cemetery Perpetual Care Endowment Fund, Mendota
St. Peter Catholic School Operating Endowment Fund, North St. Paul
St. Peter Cemetery Care Endowment Fund, North St. Paul
St. Peter Parish Operating Endowment Fund, North St. Paul
St. Peter School Tuition Assistance Endowment Fund, North St. Paul
St. Philip Church Clifford and Audrey Olson Endowment Fund, Litchfield
St. Pius X Permanent Endowment Fund, White Bear Lake
St. Richard BTCS Scholarship Endowment Fund, Richfield
St. Richard Undesignated Endowment Fund, Richfield
St. Rose of Lima Legacy Fund, Roseville
St. Rose of Lima Parish School Mischke Family Endowment Fund, Roseville
St. Stephen Church Emmett and Augusta Goff Endowment Fund, Minneapolis
St. Therese Advisory Fund, Deephaven
St. Therese Good Samaritan Endowment Fund, Deephaven
St. Therese School Advisory Fund, Deephaven
St. Therese Pastoral Care Endowment Fund, St. Louis Park
St. Thomas the Apostle Endowment Fund, St. Paul
St. Thomas Aquinas Goldie and Lorraine Buda Scholarship Fund, St. Paul Park
St. Timothy Endowment Fund, Blaine
St. Victoria Cemetery Perpetual Care Endowment Fund, Victoria
St. Victoria Parish Unrestricted Endowment Fund, Victoria
St. Wenceslaus Cemetery Endowment Fund, New Prague
St. Wenceslaus Endowment Fund, New Prague
St. Wenceslaus School Endowment Fund, New Prague
T Transfiguration Church Ted Zarembski Scholarship Endowment Fund, Oakdale
Trinity Founding Churches Educational Endowment Fund, St. Paul

Agency Funds

Catholic parishes, schools, and institutions partner with the Catholic Community Foundation to manage charitable assets. Always taking into account the appropriate amount of risk, CCF’s portfolio balances the objectives of investing in a faith-consistent manner while attempting to maximize financial return over time.

- A Aim Higher Scholarship Fund
Annunciation Funds, Minneapolis
Ascension Education Fund, Minneapolis
Assumption 2000 Fund, Richfield
- B Basilica of St. Mary Funds, Minneapolis
Blessed Sacrament Reserve Fund, St. Paul
Blessed Trinity Catholic School Endowment Fund, Richfield
- C Cathedral of St. Paul Funds, St. Paul
Catholic Cemeteries Funds
Catholic Charities of St. Paul and Minneapolis Funds
Catholic Senior Services Investment Fund
Center for Mission Fund, St. Paul
Corpus Christi Fund, Roseville
- D Diocese of New Ulm Fr. John Joyce Education Funds
- G Guardian Angels Funds, Oakdale
- H Highland Catholic School Funds, St. Paul
Hill-Murray School Tyler Family Tuition Fund, Maplewood
Holy Childhood Funds, St. Paul
Holy Family Academy Endowment Fund, St. Louis Park
Holy Family Catholic High School Endowment Fund, Victoria
Holy Name Reserve Fund, Minneapolis
Holy Name of Jesus Funds, Wayzata
Holy Rosary Catholic Church Capital Improvements Fund, Minneapolis
Holy Spirit Funds, St. Paul
- I Immaculate Heart of Mary - St. Luke School Funds, St. Paul
- L League of Catholic Women Funds, Minneapolis
Lumen Christi Funds, St. Paul
- M Marquette School Endowment Fund, Virginia
Mary, Mother of the Church Fund, Burnsville
Mary Queen of Peace Funds, Rogers
Maternity of Mary/St. Andrew Catholic School Investment Fund, St. Paul
Most Holy Redeemer School Endowment Fund, Montgomery
Most Holy Trinity Fund, Veseli
- N Nativity of the Blessed Virgin Mary Fund, Bloomington
Nativity of Our Lord Endowment Trust Fund, St. Paul
NET Ministries Funds, West St. Paul
- O Our Lady of Grace Funds, Edina
Our Lady of the Lake School Fundraising Campaign 2013 Fund, Mound
Our Lady of Peace Funds, Minneapolis
Our Lady of Victory Long Term Investment Fund, Minneapolis
- R Risen Christ School Funds, Minneapolis
- S Sacred Heart Investment Fund, Robbinsdale
Ss. Joachim and Anne Funds, Shakopee
Ss. Peter and Paul Funds, Loretto

- St. Adalbert Long-Term Reserve Fund, St. Paul
St. Agnes Investment Fund, St. Paul
St. Albert Funds, Albertville
St. Albert the Great Parish Fund, Minneapolis
St. Aloysius Agency Fund, Olivia
St. Alphonsus Long-Term Investment Fund, Brooklyn Center
St. Anastasia New Office Space Fund, Hutchinson
St. Anne Fund, Hamel
St. Anne’s Educational Foundation Funds, Minneapolis
St. Anne-St. Joseph Hien Fund, Minneapolis
St. Anthony Perpetual Care Fund, Watkins
St. Bernard School Fund, Cologne
St. Bridget of Sweden Reserve Fund, Lindstrom
St. Charles Borromeo Evangelization Endowment Fund, St. Anthony
St. Columba Funds, St. Paul
St. Dominic Funds, Northfield
St. Edward Fund, Bloomington
St. Elizabeth Ann Seton Parish Cemetery Fund, Hastings
St. Francis Cabrini Sally Jernberg Memorial Fund, Minneapolis
St. Francis de Sales Funds, St. Paul
St. Francis - St. James School Funds, St. Paul
St. Genevieve Capital Fund, Centerville
St. George Funds, Long Lake
St. John Investment Funds, Hector
St. John the Baptist Funds, Excelsior
St. John the Baptist Funds, Hugo
St. John the Baptist Funds, Jordan
St. John the Baptist Funds, New Brighton
St. John the Baptist Funds, Savage
St. John the Evangelist School Endowment Fund, Duluth
St. John the Evangelist Funds, Little Canada
St. John Vianney Seminary Investment Fund, St. Paul
St. Joseph of the Lakes Cemetery Fund, Lino Lakes
St. Joseph Parish Fund, Montevideo
St. Joseph Calvary Cemetery Perpetual Care Endowment Fund, Red Wing
St. Joseph Funds, Waconia
St. Joseph Funds, West St. Paul
St. Jude of the Lake Endowment Trust Fund, Mahtomedi
St. Katharine Drexel Building Fund, Ramsey
St. Louis, King of France Funds, St. Paul
St. Luke Fund, Clearwater
St. Maron Maronite Funds, Minneapolis
St. Mary Fund, New Trier
St. Mary Funds, Sleepy Eye
St. Mary of The Lake Endowment Fund, White Bear Lake
St. Mathias Cemetery Fund, Hampton

- St. Maximilian Kolbe Funds, Delano
St. Michael Funds, Farmington
St. Michael Cemetery Fund, Prior Lake
St. Michael Jeanett R. & Lawrence F. Klein 20 Year Term Fund, Stillwater
St. Michael Funds, St. Michael
St. Nicholas Funds, Carver
St. Nicholas Fund, New Market
St. Patrick Funds, Edina
St. Patrick of Cedar Lake Agency Fund, Jordan
St. Patrick Funds, Oak Grove
St. Patrick Long Term Investment Fund, St. Paul
St. Paul Church Fr. Tim Nolan Vocation Endowment Fund, Ham Lake
St. Paul Seminary Investment Fund, St. Paul
St. Paul’s Outreach Funds, West St. Paul
St. Peter Parish Endowment Fund, Forest Lake
St. Peter Cemetery Care Operating Fund, North St. Paul
St. Peter Funds, Richfield
St. Peter Funds, St. Peter
St. Peter Claver Funds, St. Paul
St. Raphael Funds, Crystal
St. Rita Fund, Cottage Grove
St. Rose of Lima Funds, Roseville
St. Stephen Catholic Church Fund, Minneapolis
St. Thomas the Apostle Endowment Fund, Corcoran
St. Thomas Aquinas Funds, St. Paul Park
St. Thomas More Catholic Community Fund, St. Paul
St. Timothy Capital Campaign Investment Fund, Blaine
St. Timothy Funds, Maple Lake
St. Vincent de Paul Funds, Brooklyn Park
St. Wenceslaus Funds, New Prague

Gifts to Support Our Mission

Although we don’t ask, we are grateful for these donors who have generously given gifts in support of our mission and outreach to the community this year.

John and Kim Arens
Dr. R. Michael and Sharon Bowen
Timothy and Mary Gray
Maurice and Alice Leuthner
Dr. Joseph and Paulette McGrath
Premier Banks

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Kent and Muriel Roessler
Mary Schaffner and Robert Lee
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Listings reflect board membership and staff employment at the time of annual report publication - winter 2020.

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Community Volunteer

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Securian Asset Management

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Linda Sauber
Assistant Controller

Brianna Thompson
Communications & Events Manager

Jules Vierling
Grants Manager

All efforts have been made to ensure the accuracy of information contained within this annual report. We have used abbreviations consistently within all lists to improve readability. If you notice an error or omission, please call 651.389.0300.



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OF MINNESOTA

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