

Northfield Area Foundation
Building Community Through Charitable Giving



2007 Annual Report

History

The NAF was created in 1993 as a part of the Minnesota Foundation (now the Minnesota Community Foundation, MCF) to receive and manage endowment funds and provide grants for the benefit of the greater Northfield community. The first funds were scholarship funds for Northfield High School graduates. Other family funds and organizational funds have been added through the years, nearly all donor-advised funds. These funds appear on the list of NAF funds, but are under the control of the persons or groups that created them. In 2000, a bequest from the estate of Dorothy and Marston Headley added a fund that is controlled by the NAF Advisory Board. Grants from this fund have been given to local organizations each year, beginning in 2001.

The early Board established policies for the Foundation, setting the stage for the current activities. Now that grants have been given from the Headley fund for six years, the Board is working on plans to increase the amount available for future grants and on alternative means of awarding such grants. In 2007, another sizable gift will be received from the Ruth Nutting Estate.

It is with sadness that Northfield says goodbye to Don Tarr, a dear friend of the community and a committed board member of the Northfield Area Foundation (NAF). Don passed away last June. Thank you, Don, for your tireless effort in helping NAF and the Northfield community.

The Community Builders Society

As part of the fund-raising efforts, the Community Builders Society has been created to recognize those donations of \$10,000 or more. Smaller gifts to the NAF Fund will become part of the general endowment of the Foundation and the income from these gifts will be used for future grants.

Treasurer's Report

The NAF has eleven endowment funds highlighted below.

- Headley Fund – Community Action Center
- Headley Fund – Northfield Historical Society
- Headley Fund – Northfield Area Foundation **
- Northfield Area Foundation Fund **
- Northfield Arts Guild Toni Sostek Memorial Fund
- Northfield City Hospital Auxiliary Fund
- Northfield Community Action Center Endowment Fund
- Northfield Operating Fund **

New in 2007:

- Nutting Family Beautification Fund **
- Nutting Family Fund **
- Nutting Family Northfield Historical Society Fund

** - NAF managed funds

Four NAF funds generate income which is distributed to various charities or organizations through an application process. The fifth fund is an operating fund used by NAF for advertising, phone expense, mailing charges, web site management and is largely funded by board members. All funds are invested through, and managed by, the Minnesota Community Foundation (MCF).

The largest endowment, the Headley Fund, had a balance of \$498,378 on 12/31/06. The board distributed \$20,015 in 2006 and approved a \$10,000 matching grant to ReNew Northfield, to be paid out at a time to be determined. In 2007 NAF will have an available-to-grant amount of \$22,221 from the Headley Fund.

An additional endowment has been received through the Ruth Nutting Estate. In 2007 the available-to-grant amount will be \$11,894. In addition, Ruth provided another gift for the “Beautification of Northfield” and asked that NAF manage these funds. This will be an additional available-to-grant amount of \$11,894.

The NAF Operating Fund received contributions of \$3,356 from board members and from Don Tarr memorials.

NAF Fund	Income	Expense	Balance
Balance on 1/1/06			\$2,781
Contributions			\$225
Income from investments	\$342		
Investment and Administrative Fees		\$34	
Balance on 12/31/06			\$3,313
NAF Operating Fund			
Balance on 1/1/06			\$14,623
Contributions	\$3,668		
Income from investments	\$649		
Operating expenses – NAF		\$5422	
Investment and Administrative Fees		\$189	
Balance on 12/31/06			\$13,329
Headley Fund			
Balance on 1/1/06			\$469,395
Contributions			
Income from investments	\$54,702		
Grants		\$20,015	
Investment and Administrative Fees		\$5,704	
Balance on 12/31/06			\$498,378

Marketing

NAF Marketing Committee, with the help of Julie Dappen from MAP for Non-Profits, worked on a marketing plan to provide direction for the committee. The process began with a Cafe Forum hosted by the NAF board to get community perceptions of NAF and to understand the needs of the community. In addition, St. Olaf students surveyed members of the community to determine how well known NAF is in Northfield. Informational interviews were conducted of various stakeholders. The information collected provided a backdrop for the committee to assess the future direction of the marketing efforts.

As a result of the planning process, the Marketing Committee suggested to the board the following areas for attention:

1. Host an annual Cafe Forum
2. Continue to hold an annual breakfast for financial advisors/estate planning attorneys
3. Evaluate the effectiveness of our current brochures and other marketing materials
4. Adopt brand platform and key messages
5. Discontinue the Philanthropy Day event

The Marketing Committee will finalize the plan in 2007 and ask for Board approval at the May board meeting.

In addition, the Marketing Committee has placed press releases and occasional columns in the Northfield News about its activities. The \$10,000 grant given by NAF to Renew Northfield for the EnergySmart Building Works has generated many opportunities to mention NAF sponsorship in the News as well; this will continue into 2008.

Grants

Grants from the Headley Fund have been given since 2001, with a total of \$115,560 granted. The full list of grantees is provided below. The amount available-to-grant (ATG) is dependent on the investment performance of the fund. In 2006 the Board awarded one grant of \$10,000 to the Renew Northfield project.

2007 Grants

Renew Northfield	\$10,000
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2006 Grants

Catholic Charities - Transportation Support	\$2,100
Community Action Center - Activity Scholarships	\$2,000
Familias en Accion - Family Literacy Fun Nights	\$2,200
Northfield Arts Guild - El teatro y baile infantil	\$1,000
Northfield Historical Society - Northfield History Timeline	\$2,500
Rotary Club of Northfield - New Water Fountain for Spring Creek Park	\$5,000
Project SIGHT - Jeopardy Wheel	\$865
Rice County Steam & Gas Engines - Granary Restoration	\$850
Three Links Care Center - Healthy Spoons Program	\$1,500
Vintage Band Music Festival - Retirement Center Performances	<u>\$2,000</u>

Total	\$20,015
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2005 Grants

HealthFinders - Free clinic for the uninsured \$10,000

2004 Grants

Catholic Charities - Weatherization Education Project \$1,600
Common Bond Communities - Study Buddies \$2,000
Community Action Center - Activity Scholarships \$2,500
Dakota County 4H - Youth Teaching Youth \$2,400
Healthy Community Initiative - Familias En Accion \$2,500
Northfield Community Action Center - Las Mujeres Sewing Class \$500
Laura Baker Services - Volunteers for Baker \$1,000
Northfield Freepops Program - Team Freepops \$4,000
Northfield Public Library - Early Literacy Center \$2,000
Northfield Senior Citizens - Popcorn Wagon Repair \$2,000
Northfield Union of Youth - Writing Workshop \$1,500
Project Sight - Double Take Drama Troupe Training \$1,500
Southern MN Assistive & Rehab. Technology
- Northfield Area Assistive Technology Access \$3,000
Three Links Care Center - Arts Flourish \$1,500
HOPE Center - Center Capacity Assessment \$3,500
Carleton College ACT Center - WomenCircle \$600
Special grant in 2004 from the Operating Fund to the
Northfield Historical Society for the Sesquicentennial project \$1,000

Total \$33,100

2003 Grants

Cannon River Community Land Trust - Advertising \$1,750
Cannon River Watershed Partnership - River Festival \$1,500
Dakota Prairie Adult Basic Education - ESL Video \$2,200
EPIC Enterprises, Inc. - Friendship Connection \$4,000
Northfield Public Schools - Families in Action \$2,900
Northfield Community Action Center - Sewing Project \$500
Laura Baker Services - Volunteer Coordinator \$700
Northfield Arts Guild - Alternative Arts \$1,100
Northfield Community Action Center - Activity Scholarships \$1,500
Northfield Gymnastics Club - Saturday Open Gym \$4,000
Northfield Historical Society - Volunteer Training Seminar \$1,000
Northfield Union of Youth - Team Squared \$2,500
People First - Transportation for Events \$860
Spring Creek Accessible Playground \$3,000

Total \$27,510

2002 Grants

Northfield Arts Guild - Picture Person Program \$1,000
Cannon Valley Watershed Partnership - Cannon River Festival \$2,500
Northfield Community Action Center - Activity Scholarships \$1,500

Northfield Diversity Coalition - Undoing Racism training	\$1,800
Communities Together for Kids - Freepops Afterschool	\$2,700
Northfield Historical Society - New Orientation Video	\$1,000
Middle School Youth Activity Center - Americorps worker	\$4,500
Project SIGHT - Father/Son Retreat	\$1,500
Rice County Dispute Resolution Program	\$3,000
Northfield Senior Citizens - Intergenerational projects	\$3,000
Northfield Union of Youth - Adult Mentoring Program	<u>\$2,500</u>

Total **\$25,000**

2001 Grants

Project Friendship	\$3,000
Northfield Arts Guild -- Discovery Theatre	\$1,950
Community Video Project	\$1,000
Northfield Youth Choirs	\$1,000
Northfield Alternative Learning Center	\$1,000
Communities Together for Kids (Freepops)	\$1,000
Northfield Union of Youth	<u>\$1,000</u>

Total **\$9,950**

Seven Year Total **\$115,560**

2007 NAF Advisory Board

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Respectfully submitted,

Bill Bleckwehl,
 Chair