

**Northfield Area Foundation**  
Building Community Through Charitable Giving



**2008 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 seven years, the Board is working on plans to increase the amount available for future grants and on alternative means of awarding such grants.

**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 twelve 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
- Street Family Fund \*\*

\*\* - NAF managed funds

Five NAF funds generate income which is distributed to various charities or 501c3 organizations

through an application process. The sixth 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 balance for all of NAF's managed funds on 1/1/07 was \$1,110,645. The balance on 12/31/07 was \$1,203,711.

### **2007 Fund Summary**

| <b>Fund</b>  | <b>Balance on 1/1/07</b> | <b>Gain</b>     | <b>Contributions</b> | <b>Interest</b> | <b>Disbursements</b> | <b>Expense</b>   | <b>Balance on 12/31/07</b> | <b>ATG 2007</b> | <b>ATG 2008</b> |
|--------------|--------------------------|-----------------|----------------------|-----------------|----------------------|------------------|----------------------------|-----------------|-----------------|
| Headley      | \$498,378                | \$37,467        |                      | \$11,900        | (\$6,387)            |                  | \$541,358                  | \$22,221        | \$22,027        |
| Nutting      | \$297,816                | \$22,393        |                      | \$7,112         | (\$3,817)            |                  | \$323,505                  | \$11,894        | \$13,164        |
| Nutting B    | \$297,809                | \$22,252        |                      | \$6,938         | (\$15,686)           |                  | \$311,312                  | \$11,894        | \$12,667        |
| Street       |                          | (\$37)          | \$8,462              | \$17            | (\$3)                |                  | \$8,440                    | \$0             | \$343           |
| NAF          | \$3,313                  | \$242           |                      | \$77            | (\$42)               |                  | \$3,591                    | \$1,975         | \$146           |
| Operating    | \$13,329                 | N/A             | \$4,700              | \$738           | (\$252)              | (\$3,011)        | \$15,505                   | N/A             | N/A             |
| <b>Total</b> | <b>\$1,110,645</b>       | <b>\$82,317</b> | <b>\$13,162</b>      | <b>\$26,782</b> | <b>(\$26,187)</b>    | <b>(\$3,011)</b> | <b>\$1,203,711</b>         | <b>\$47,984</b> | <b>\$48,347</b> |

### **Marketing Report**

The committee finalized a Marketing Plan which was approved and adopted by the Board.

### **Café Forum**

The committee organized a Café Forum on June 20, 2007 on the Three Links campus. It was attended by 21 individuals (including six NAF board members) representing a cross-section of area residents. The purpose of the Café Forum was to provide an interactive opportunity for citizens to advise the Foundation. The event was facilitated by Julie Dappen from MAP for Non-Profits.

### **Media Presence**

KYMN Radio: Chair Bill Bleckwehl informed listeners about the Foundation.

Nutting Family Article: Board member Dan Freeman wrote an article about the Nutting family that was published in the September 26th edition of the Northfield News. The article highlighted one of the Foundation's largest donors while at the same time informing Northfield residents of NAF's presence and the family's sizable donation to the organization.

### **Financial Advisor's Breakfast**

The committee held a seminar on October 17th at the Northfield Golf Club for 14 local financial, legal and accounting advisors. The purpose of the seminar was to provide information about planned giving strategies. Carleen Rhodes, President and CEO of the Minnesota Community Foundation (MCF) introduced attendees to the current charitable giving landscape and Jean Roberts, Vice President of Development for MCF provided the continuing education portion of the seminar. Attendees were given information about NAF, MCF and charitable giving reference materials. The event also provided an opportunity to remind local advisors of the

Foundation's presence in the community and encourage them to be strong supporters and referral sources.

### **Marketing Materials**

Brochure: A new general brochure was developed and printed.

Website: [www.northfieldareafoundation.org](http://www.northfieldareafoundation.org) was updated.

Videos: Two short videos are being planned that will be produced by a Carlton student this summer. One video will describe NAF as an organization. A second video will describe the grant process and feature testimonials from grant recipients.

### **Grants Report**

A \$10,000 gift from the Northfield Area Foundation will help make affordable housing more energy efficient and reduce the city's carbon footprint. This money was considered a 'local match' for a \$40,000 grant from a state agency investing in communities seeking innovative energy solutions.

The grant to ReNew Northfield was one of fourteen gifts to eleven area organizations. In all, nearly \$48,000 was distributed in 2007 and January, 2008.

Local organizations apply for funds and a volunteer review committee makes recommendations for funding. This year, three themes emerged from the grants:

- Bringing state or national resources to Northfield (examples: energy solutions, Latino leadership development, musicians, historical actors, youth development, character education, parent education).
- Meeting unmet needs (dental, activity fees, college applications and campus visits, field trips for autistic young people).
- Supporting community volunteerism (dental services, service learning in schools for community, personal financial support to others, community band, middle and high school peer trainers, historical building restoration, public art development and Northfield beautification).

#### 2007 Grants

**Northfield Rotary** – An \$11,894 grant was made to the Northfield Rotary to help build and plant a garden at the Northfield Soccer Complex. This was the first gift to come out of the Ruth Nutting estate designated for "beautification of Northfield".

**Community Action Center** - A \$5,000 grant will help provide dental care for low-income adults through a program called "Miles of Smiles." This program first provided dental services for low-income children; through this the need for adult dental care was identified.

**Community Action Center** - A separate \$2,000 award will help cover activity fees for low-income students to participate in athletic and extra-curricular activities. With many local sports clubs, recreation and arts groups requiring fees for participation, the CAC serves as a

‘clearinghouse’ with available funding so that young people do not face a financial barrier limiting their participation.

**Friends Anonymous** - \$1,500 will allow this group to fund immediate, urgent requests that often can't be fulfilled by other groups. An example is a short term grant to pay a mortgage company one month's rent to avoid foreclosure and allow a family time to stabilize their financial situation. It also intends to reach more “friends” with a commitment to personal financial giving so that more unmet needs can be met.

**Northfield Area Latino Leadership Council** - The \$1,200 grant will help with leadership-building within the city's Latino community. The Main Street Project is the fiscal agency; its mission is developing emerging leaders of all ages within the rural Latino community as a means of creating change from the inside out.

**Northfield Community Band** - \$1,500 will pay for guest musicians and to rent the city's showmobile for four summer concerts in downtown Northfield. Many local musicians will share their talents while others enjoy the music, shop at the local businesses and see friends and neighbors.

**Northfield Public Library** – Historical actors will come to Northfield during the summer to help young people understand and celebrate Minnesota's sesquicentennial with funding of a \$1,000 grant.

**Northfield High School** - Students will be able to expand service learning projects with a \$5,000 grant. This grant supplements another national grant and allows flexibility to build the program to best benefit Northfield.

**Northfield Union of Youth** – Peer support and resources will help more young people pursue a secondary education. An award of \$720 will help high school students apply to colleges and provide campus tours.

**Project ABLE** - Programs for those with autism, ages 11 to 20, will be funded with \$1,900 to the Northfield Community Services division. The funds will support field trips to regional resources including the National Eagle Center.

**Project Sight** - \$2,850 funds this teen pregnancy prevention program in which teens deliver the message through skits. A nationally acclaimed training group will be brought to Northfield to work with the middle and high school students who then volunteer their time to go into classrooms with their memorable skits.

**Parents Meeting Parents** – This recently formed volunteer group, which works under the Northfield Family YMCA umbrella, received \$1,025 supporting parents of children with disabilities to attend educational sessions to learn skills, find support and identify available resources.

**Sibley Elementary** - A \$1,995 grant will pay for a character education program at the school designed to combat teasing and bullying and encourage students to be kinder and more compassionate.

**Rice County Steam and Gas Engine Club** - A \$400 grant will help the club restore a corn crib on its fair grounds near Dundas. This historic restoration site brings visitors to Northfield from throughout southern Minnesota and showcases the areas proud agricultural heritage.

**Spring, 2008 Grants**

**Northfield Historical Society** - \$10,000 will help pay for the installation of a ton and a half bronze sculpture, Harvest, along the soon-to-be-refurbished river walk between Bridge Square and Fifth Street. Ray Jacobson's sculpture, which celebrates the city's milling origins, now stands just outside the entrance to Malt-O-Meal's Campbell Plant.

**Northfield Downtown Development Corporation** - \$12,667 was given to support the efforts of American in Bloom, a community wide initiative co-sponsored by the Northfield Garden Club. This volunteer-led effort will focus on improving eight areas within Northfield including: floral displays, environmental awareness, landscaped areas, tidiness, urban forestry, heritage preservation, turf and groundcovers and community involvement

**Grant Summary**

**2007 Grants**

|   |              |
|---|--------------|
| Northfield Rotary, Ruth Nutting Garden    | \$11,894     |
| Renew Northfield                          | \$10,000     |
| Community Action Center                   | \$7,000      |
| Friends Anonymous                         | \$1,500      |
| Northfield Area Latino Leadership Council | \$1,200      |
| Northfield Community Band                 | \$1,500      |
| Northfield Public Library                 | \$1,000      |
| Northfield High School                    | \$5,000      |
| Northfield Union of Youth                 | \$720        |
| Project ABLE                              | \$1,900      |
| Project Sight                             | \$2,850      |
| Parents Meeting Parents                   | \$1,025      |
| Sibley Elementary                         | \$1,995      |
| Rice County Steam and Gas Engine Club     | <u>\$400</u> |

**Total** **\$47,984**

**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> |

|              |                 |
|--------------|-----------------|
| <b>Total</b> | <b>\$20,015</b> |
|--------------|-----------------|

**2005 Grants**

|   |                 |
|---|-----------------|
| HealthFinders - Free clinic for the uninsured | <b>\$10,000</b> |
|---|-----------------|

**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<br>- 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<br>Northfield Historical Society for the Sesquicentennial project | <u>\$1,000</u> |

|              |                 |
|--------------|-----------------|
| <b>Total</b> | <b>\$33,100</b> |
|--------------|-----------------|

**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                         | <u>\$3,000</u> |

|              |                 |
|--------------|-----------------|
| <b>Total</b> | <b>\$27,510</b> |
|--------------|-----------------|

**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** **\$173,559**

**2007 NAF Advisory Board**

Pat Allen  
Bill Bleckwehl, Chair  
Ray Cox  
Rich Falck  
Dan Freeman  
Jayne Hager Dee, Vice Chair  
Clarita Kell  
Karna Halverson  
Andy Langehough  
Anne Mayer  
Catherine McBride, Secretary  
Jim Nelson, Treasurer  
Donna Rae Scheffert  
Candy Taylor  
Lynne Wilmot

Respectfully  
submitted,



Bill Bleckwehl,  
Chair