

# LEGACIES *in* ACTION

2024 ANNUAL REPORT



ST. CROIX VALLEY FOUNDATION





## St. Croix Valley Foundation (SCVF) supports legacies in action.

In 2024, we facilitated more than \$5.8 million in grants and scholarships to nonprofits to enhance the quality of life in the St. Croix Valley. Founded in 1995 to foster local philanthropy and respond to local needs, we are your partner in philanthropy.

By partnering with SCVF, donors know their gifts will have lasting impact in the region they love. We support ten hard-working, volunteer-led affiliate community foundations throughout the St. Croix Valley, each dedicated to addressing the unique needs of their communities. In 2024, our affiliate community foundations made meaningful, impactful grants to worthy nonprofits in their areas.

Our service area includes Chisago and Washington Counties in Minnesota, and Burnett, Polk, St. Croix and Pierce Counties in Wisconsin.

### ST. CROIX VALLEY FOUNDATION SERVICE AREA



LEARN MORE ABOUT SCVF'S AFFILIATE COMMUNITY FOUNDATIONS AT [SCVFFOUNDATION.ORG/AFFILIATED-COMMUNITY-FOUNDATIONS](https://scvffoundation.org/affiliated-community-foundations)



**ANN HERZOG DREWISKE**  
BOARD CHAIR



**HEATHER LOGELIN**  
PRESIDENT & CEO

## MESSAGE from the BOARD CHAIR & PRESIDENT

Dear Friends,

At St. Croix Valley Foundation (SCVF), we support legacies in action to enhance the quality of life throughout the Valley. This year, we are leaning into legacy giving, helping donors plan their legacy gifts that will support future generations through grants and scholarships.

We have also renewed our focus on building endowments – forever funds that continue to grow under our stewardship and provide perpetual support for our region. By partnering with SCVF, donors know their endowed gifts will have a positive impact – forever.

We are here, too, to support professional advisors as they guide their clients through the legacy-planning process. Our local expertise and deep, Valley-wide connections have helped countless donors establish their own philanthropic legacies, and we are honored to partner with financial advisors and attorneys to assist in any stage of the legacy-planning process.

Thank you for your continued partnership and trust as we celebrate another year of dedication, support and generosity throughout the Valley.

ANN HERZOG DREWISKE

HEATHER LOGELIN

**P.S. If you'd like to talk about your legacy and the future of our region, we are here to support you.**

**ON THE COVER:** Donor, Legacy Society member and Northwest Alliance Community Foundation board member Jennifer Turrentine beams in the sunshine

## BOARD of DIRECTORS

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SCALEUP NONPROFIT CONSULTING

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VICE PRESIDENT FOR CAMP OPERATIONS AND ADVENTURE  
YMCA OF THE NORTH

# OUR MISSION

The mission of St. Croix Valley Foundation is to enhance the quality of life in the St. Croix Valley.

## OUR VALUES

### **Trust**

We value the trust our partners place in us to manage philanthropic assets with accountability and confidentiality, to engage them in meaningful ways, and to assess and respond to the needs of the St. Croix Valley.

### **Community**

We ground our work in the deep sense of connection people have for the St. Croix Valley, a region of unique communities united by shared values and experiences.

### **Collaboration**

We bring people together to build relationships, increase knowledge and create positive change. We welcome diverse perspectives and experiences, working towards equity in all that we do.

### **Generosity**

We support those wanting to give back to the community – today, tomorrow and forever.

### **Impact**

We strive to ensure that our work – supporting donors, facilitating impactful grants and providing community leadership – truly improves quality of life in the Valley.

## YOUR STAFF TEAM

**KATIE CLYMER**, ACCOUNTANT

**SALLY HERMANN**, PHILANTHROPIC SERVICES ASSOCIATE

**HEIDI HERRON**, GRANTS AND SCHOLARSHIP MANAGER

**JILL LEONARD**, DIRECTOR OF PHILANTHROPIC SERVICES

**HEATHER LOGELIN**, PRESIDENT AND CEO

**EMILY LOWNSBURY**, VICE PRESIDENT OF FINANCE & OPERATIONS

**ANGIE PILGRIM**, VICE PRESIDENT OF COMMUNITY IMPACT

**ALAUNA YUST**, MARKETING COMMUNICATIONS MANAGER





# OUR STRATEGIC FRAMEWORK

In 2024, after more than 18 months of planning and community engagement, we released a new Strategic Action Plan to guide our work and ensure we deliver on our mission. We believe these strategic priorities will set us up for the greatest region-wide impact.

**Leverage our relationships with donors** to significantly grow long-term unrestricted and field of interest funds.

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**Leverage competitive grantmaking, nonprofit engagement and other partnerships** to amplify our impact.

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**Prioritize affiliate community foundations** as a vital part of building long-term philanthropic assets and deploying effective grants across the region.

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**Operate from a more efficient business model** that positions SCVF for increased growth and impact.





## MUSIC EDUCATION GRANTS

SCVF, in collaboration with an anonymous donor, funded 16 Music Education Grant requests totaling **\$45,056**. The grants helped enhance the quality of music education programs throughout the St. Croix Valley.



▲  
WORLD-RENOWNED SOUKOUS MUSICIAN SIAMA MATUZUNGIDI PERFORMED FOR THE STUDENTS OF ST. PATRICK'S SCHOOL IN HUDSON, THANKS TO A MUSIC EDUCATION GRANT

## VALLEY ARTS GRANTS

Eighteen organizations received Valley Arts Grants totaling **\$60,000** to support high-quality arts programming in our region.

## FIRST THOUSAND DAYS GRANTS

Through our newest competitive grant program, eight nonprofits supporting children and their families during the first thousand days (roughly three years) of life received a total of **\$149,300** in grants (with additional, immediate support provided by Bill & Rita Lawson).





# OUR COMPETITIVE GRANT PROGRAMS



SCVF supports donors interested in general areas of focus – rather than particular nonprofits – with field of interest funds. These broad funds enable donors to create a fund to which anyone can contribute, allowing community members and organizations to support those causes, too. In 2024, earnings from each field of interest fund fueled grants that supported music education, the arts, early childhood development and mental health. In addition to these grants, we launched the first round of applications for Environmental Grants, which will award funds for the first time in fiscal year 2025.

**We also leveraged partnerships with local donors, foundations and organizations who contributed additional dollars for these competitive grant programs.**

## VIBRANT COMMUNITIES MENTAL HEALTH GRANTS

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This unique, region-wide grant program represents our largest collaborative grant awarded in partnership with all ten of SCVF's affiliate community foundations, with additional support from several SCVF donor advised fund holders. Together, we awarded **\$166,192** to support 27 nonprofits working in mental health throughout our entire service area.

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MARINE MILLS FOLK SCHOOL RECEIVED A VALLEY ARTS GRANT TO SUPPORT HANDS-ON FOLK AND TRADITIONAL ARTS OPPORTUNITIES  
PHOTO COURTESY OF MARINE MILLS FOLK SCHOOL



GAMMELGÅRDEN MUSEUM OF SCANDIA USED A VALLEY ARTS GRANT TO SUPPORT SWEDISH AND HMONG FOLK MUSIC AND DANCING AT THE ANNUAL SPELMANSSTÄMMAN FESTIVAL  
PHOTO COURTESY OF GAMMELGÅRDEN MUSEUM



# PROVIDING **OPPORTUNITIES** FOR HEALTH CARE WORKERS

OCCUPATIONAL THERAPIST ALY ENGLE  
AND PHYSICAL THERAPIST MELISSA OTTO  
POSE IN FRONT OF THE PIERCE COUNTY  
OFFICE BUILDING.

## **Unrestricted Endowed Fund**

Our Health Care Grants are possible thanks to an unrestricted endowed fund that provides SCVF with the flexibility to respond to the changing needs of our region.



▲  
PHYSICAL THERAPIST  
MELISSA OTTO ASSISTS  
YOUNG PATIENTS IN  
THEIR HOMES.



AZ Snyder was in a tailspin. The Pierce County Public Health Director had just gotten word that the county's contract with their therapy provider was going to become unaffordable for the county. Physical and occupational therapists are integral to the county's Birth to Three Program, and AZ's only option was to try to hire full-time therapists during a national workforce shortage.



"I knew I was going to be competing against private therapy practices and large healthcare systems, and I knew we couldn't offer anywhere near what they could in terms of financial compensation," said AZ, recalling similar positions that had gone without a single application for months. "I was really doubting my ability to be able to recruit for these therapy positions, and this work is so core to what we do in public health."

That's when she learned about SCVF's Health Care Grants, which were created when Good Samaritan Society closed its St. Croix Falls facility and established an **unrestricted**

**endowed fund** at SCVF. Unrestricted funds give SCVF the greatest flexibility to meet the changing needs of our region. Recognizing the Valley's health care worker shortage, SCVF granted these flexible funds to nonprofit and public health care organizations so they could, in turn, address the continuing needs of their staff.

"These grants are a great example of our ability to respond to needs as they arise," said Heidi Herron, SCVF's Grants and Scholarships Manager. "We know that health care organizations serve their communities differently, so we built in enough flexibility for each grantee to define and meet their own unique needs."

For AZ, the most urgent need was to hire qualified, committed therapists. She immediately got to work, creatively utilizing Health Care Grant funds to design positions that offered professional development stipends in the first year of employment.

"We were able to get a very strong applicant pool that I was shocked by," said AZ. "Being able to advertise that we had quite a substantial pot of funds to do professional development, which we would not have had without this

opportunity, was a really good carrot to get people to apply."

"It was a lovely carrot," agreed Aly Engle, the occupational therapist AZ hired. "Continuing education in the therapy realm is super expensive. A lot of the time, we end up paying for those types of things out of pocket because there just aren't funds allocated for that. Knowing that we have those funds was hugely motivating. To be able to dive a little deeper into our own profession and different areas that we enjoy really feeds our passion."

"For physical therapy, we need 30 hours of continuing education every two years to make sure we have met those requirements for us to keep practicing," said Melissa Otto, the newly hired physical therapist in the Birth to Three Program. "The classes and national conferences are so expensive and it's such a great opportunity that we wouldn't have had otherwise."

Aly and Melissa have already put their professional development funds to work, buying books, taking classes and signing up for conferences. Recently, they took a training course to help parents of babies that have experienced medical trauma bond through physical touch. Both are now certified to lead such classes in Pierce County, in addition to the work they do daily to coach and empower parents and kids in their own homes.

For AZ, who is driven by both compassion and results, Health Care Grants have provided an opportunity to invest in her staff. She sees their work as essential and their impact on families as lifelong.

With flexible, unrestricted funding, SCVF will continue to assess and respond to emerging community needs forever. ■





# SHOWING UP FOR LGBTQ YOUTH NAN'S STORY

**Nan Leekley describes herself as a risk taker. She once biked across the entire United States.** At age 50 she became a downhill ski racing coach – having only skied a handful of times – to support her sons' interest in the sport. (By all accounts, she excelled at it.) And around 30 years ago, Nan and her then-partner were among the first same-sex couples in the state of Minnesota to adopt children.

**Donor designated funds** like the Nan Leekley LGBTQ Youth Fund are endowed funds set up to provide annual grants automatically to nonprofit organizations chosen by the donor when the fund is established. Donor designated funds make giving easy and automatic.



**“There was a movement within the gay and lesbian community to be able to adopt,” Nan recalled. “Minnesota had one of the largest groups of gay people who wanted to adopt kids in the United States, just behind California.”**

In 2021, after retiring from a career at Stillwater Area Public Schools, she opened the Nan Leekley LGBTQ Youth Fund at SCVF – an endowed fund that will forever support LGBTQ+ youth within the district, and students with LGBTQ+ family members. As a donor designated fund, grants will automatically benefit the Partnership Plan, a nonprofit created to connect the community of Stillwater to its public schools. The Partnership Plan helps provide new funding for educational experiences and innovative projects, all to help enhance students’ educational experiences. Recently, the Partnership Plan has focused its efforts on mental health support. Nan’s fund will specifically support LGBTQ+ students and their families.

**“My goal was to make it so that the kids who were experiencing these situations had access to funds of some kind to try to help make their experience different,”** Nan said,

listing mental health supports, acceptance education and social club activities as some of the ways money from the fund could be used. She also hopes the fund could assist with housing and employment, as LGBTQ+ youth are more likely to experience homelessness or become victims of trafficking, according to the U of M’s Minnesota Student Survey.

Now retired, Nan has started thinking about her legacy. Although she notes a general trend toward acceptance during her lifetime, she sees the toll the recent political climate has taken on students. According to the Trevor Project, in 2024 more than 600 bills were introduced in legislatures across the country targeting inclusive school policies and questioning the rights of LGBTQ+ students.

More than 70% of LGBTQ+ youth, including 86% of transgender and nonbinary youth, say such laws have negatively impacted their mental health.

In the few years since it was established, the Nan Leekley LGBTQ Youth Fund has already made a difference. In 2022, staff members attended an LGBTQ+ Professional Development for Educators Conference. And, with an additional donation from Nan, around 45 Stillwater Area Public School students participated in a statewide LGBTQ+ conference last year.

“There are so many different panels you can go to at the summit,” said a student, who attended several educational and leadership sessions as a sophomore. “Having opportunities like this where it’s a safe space, an open space, and school funded is such an incredible opportunity for kids who are out, who aren’t out, who just want to learn, who just want to be there for their friends. It’s truly an amazing thing and I think it should be open to as many schools as possible.”

Another student, who identifies as a transgender girl, agreed that the conference felt safe and open – two feelings not always experienced by LGBTQ+ youth. The student’s experience was extremely positive, and the highlight was a dance class intended purely for fun.

**“The people leading the session were amazing people,” the student said. “Everyone in the room just kept the energy high, and it was a great experience.”**

Nan’s vision of the future, like SCVF’s, values openness, inclusivity and a sense of true belonging for all students within their schools and the broader community.

“Everybody’s here for a short period of time, and what does your time here mean?” Nan recently reflected. “For me, the legacy part of it is that I plan to cram all my assets into the fund when I die, because my hope is that every school district has a fund like this – everywhere.” ■

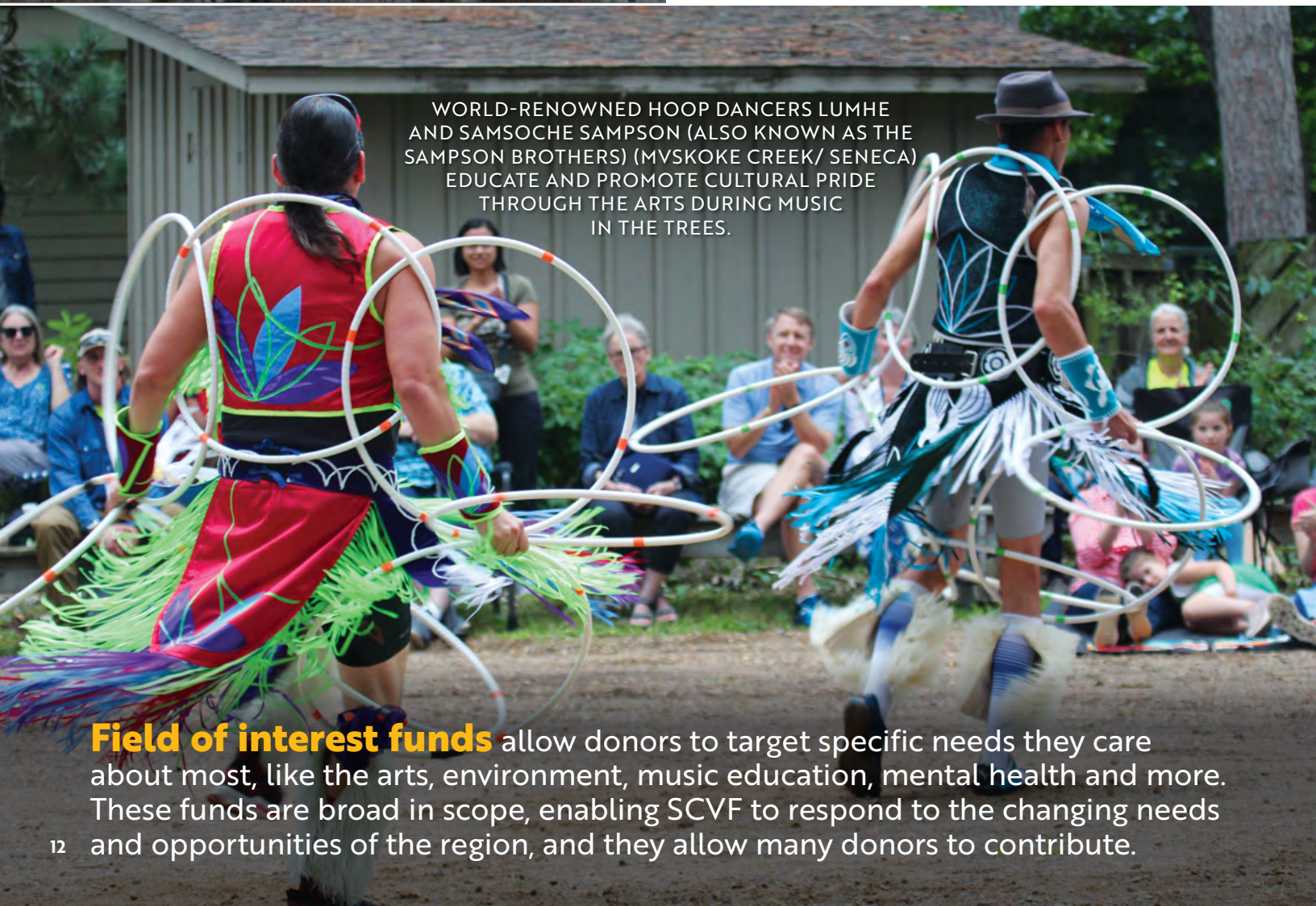




LAURA HARADA ON VIOLIN AND NATHAN HANSON ON SAXOPHONE PERFORM IN DEER STANDS IN BELWIN'S RED PINE GROVE. PHOTO BY NANCY KLINGER

# CONNECTING THROUGH THE ARTS **AT BELWIN CONSERVANCY**

Belwin Conservancy in Afton offers many amenities one would expect from a conservancy: hiking trails, public events and educational programs with naturalists. In addition to their work of restoring native ecosystems in the St. Croix Valley, Belwin is also known for its educational partnerships with St. Paul Public Schools and Anishinabe Academy, welcoming 10,000 students to its trails and education center every year.



WORLD-RENOWNED HOOP DANCERS LUMHE AND SAMSOCHÉ SAMPSON (ALSO KNOWN AS THE SAMPSON BROTHERS) (MYSKOKÉ CREEK/ SENECA) EDUCATE AND PROMOTE CULTURAL PRIDE THROUGH THE ARTS DURING MUSIC IN THE TREES.

**Field of interest funds** allow donors to target specific needs they care about most, like the arts, environment, music education, mental health and more. These funds are broad in scope, enabling SCVF to respond to the changing needs and opportunities of the region, and they allow many donors to contribute.



But toward the end of summer, Belwin's red pine grove becomes a most unlikely outdoor venue for its annual, multi-day music festival – Music in the Trees.

Music in the Trees is funded in part by SCVF's Valley Arts Grant – a collaborative grant in which SCVF matches funds from the Wisconsin State Arts Board and welcomes additional funding from partners like the Hugh J. Andersen Foundation. Started with a generous, anonymous donation in 2008, the Valley Arts Grant Program has awarded over \$625,000 to date, including \$60,000 in 2024.

The Valley Arts Fund is an endowed field of interest fund that will forever support the region's vibrant arts community. Anyone can donate to the fund. Grantees represent a diverse array of organizations, including those with arts at the core of their mission, and those with strong arts programming, like Belwin.

**"I was hired in 2015 to bring the arts to Belwin as a way of reaching new audiences and reaching people's hearts, connecting them to our earth," said Belwin's Program Director Susan Haugh, who is also a composer and multi-instrumentalist. "Now we have several programs, like Music in the Trees, where we ask all these awesome musicians to get up in deer stands about 16 feet up in these red pines and make music."**

"It's a way we can deepen the experience for frequent Belwin visitors and bring people out to experience nature who might not come otherwise," said Belwin's Executive Director Katie Bloome, noting that roughly half of attendees are new to Belwin each year.

"Music in the Trees is potentially bringing a different audience because they're being drawn in by the arts, and then maybe they can learn about and connect to nature, too."

As Susan explains, the impetus for the music festival was to shed light on the red pines themselves, which were planted unsustainably.

**"They were planted to stop erosion," she said, "but they are a monoculture so they're getting infected and starting to die. We want to both celebrate them and what they did for the land and nurture a new and healthy ecology of white pines, burr oaks and native plants."**

For Belwin, the arts have become an important vehicle for connecting hundreds of Music in the Trees participants to local ecosystems, while providing high-quality musical experiences to attendees and artists alike. Among this year's lineup were cellists, a zither player, hoop dancers accompanied by drums and Native flutes, and a wide variety of vocal and instrumental styles.

"We have been intentional about the diversity of music styles and cultures and bringing music that maybe people don't hear in the St. Croix Valley very often," said Katie.

"It's curating so that we show the diversity of people that live in the region," Susan agreed.

Susan's long-term goal for Music in the Trees is surprising: she hopes it will end. When the native ecosystem is restored and educating the public about the red pines is no longer necessary, Susan will consider new artistic forms in new spaces, like the woodlands, prairies and oak savannas that comprise Belwin's 1,500 acres. In the meantime, Music in the Trees will continue to connect and inspire through the arts.

**"The arts connect people," Susan said. "No matter what language you speak, where you're coming from, your age... Music, color, dance – all the arts connect us and open new avenues of perception, connecting us with each other and the earth in new ways." ■**

# PRESERVING LOCAL HISTORY: Jo Ann's Story

"You have to look at the past in order to help guide you for the future, to make decisions today."

That deep respect for history has been a throughline in Jo Ann Hallquist's long life. She has always found value in learning about her ancestors' journeys from Sweden and Denmark to rural Amery, Wisconsin. In her career, too, understanding history was a core competency. A true groundbreaker, Jo Ann was among the first women to serve as a Foreign Service Officer (FSO), living all over the world in the late '50s and '60s.



JO ANN HALLQUIST



JO ANN HALLQUIST SHAKES THE HAND OF THEN-PRESIDENT LYNDON B. JOHNSON DURING HER TIME AS AN FSO



CHIEF DAN MOSAY (ST. CROIX BAND OF LAKE SUPERIOR CHIPPEWA) LEADS A SCHOOL TOUR AT THE MUSEUM, STANDING IN FRONT OF THE REPLICA OF A WIGWAM CONSTRUCTED BY CHIEF DAN AND HIS FATHER, CHIEF ARCHIE MOSAY



STUDENTS ADMIRE THE MUSEUM'S HAT COLLECTION



“History is very much a part of foreign affairs,” said Jo Ann. “You can’t separate it. Anyone in the Foreign Service is very much involved in the history of the area in which they’re working, because history has so much to do with what’s currently going on.”

After an illustrious career as an FSO, Jo Ann spent many years in Washington D.C., working in international trade before eventually retiring to Amery. In retirement, she has actively helped preserve local history as a volunteer archivist for the Polk County History Museum in Balsam Lake.

“It’s really important to me that history museums have good archives,” said Jo Ann, who sees great promise in utilizing technology to help organize the museum’s archives and make them more available to the public.

Fortunately, Brenna Weston, Polk County History Museum’s new director, shares Jo Ann’s vision. When Brenna joined the Polk County Museum, Jo Ann felt it was time to invest more than volunteer hours in the museum. This year, she established the Hallquist History Fund, an endowed donor designated fund that will forever benefit the Polk County Museum through annual, automatic grants. Working closely with SCVF, Jo Ann was able to ensure that her gift will specifically support the archival work she values so highly.

“My main goal with the archives is making sure that everything is organized in a way

that somebody can find the information they want – whether that’s me, a researcher, a teacher, or eventually, a member of the public who wants to come in and do research on their own,” said Brenna, whose background in anthropology, dual master’s degrees and interest in education made her the ideal fit for the museum director position. She plans to start by purchasing a large-scale scanner that can capture flat maps and other larger items.

“My next goal is to have an intern that’s able to come in and start working through the actual digitization process – that’s the whole process of taking pictures, including all the metadata, putting it on the storage hard drive, and if time allows, starting to put it online.”

Digitizing the archive could also impact the next generation of potential history lovers: students. By making historical photos and records available online, Jo Ann and Brenna hope students will access primary sources more readily and understand the foundations of quality research – all while learning about Polk County history.

“Human history is important,” said Brenna. “It’s preserving people’s lives, especially when someone documents in the form of a journal or correspondence the everyday goings-on in their life. I want to find ways to continue to keep this relevant and exciting for the kids that come here.”

As for Jo Ann, a love of history doesn’t stop her from thinking about the future. She plans to add to the Hallquist History Fund through her estate, sealing her legacy as a protector of history. ■

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**As an endowed donor designated fund,** the Hallquist History Fund will support Polk County Museum forever through automatic, annual grants.  
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THE PHYSICAL ARCHIVES AT THE POLK COUNTY HISTORY MUSEUM ▶

▲ A HISTORICAL PHOTO OF THE MUSEUM ADORNS ITS OWN WALLS. THE STRUCTURE, BUILT IN 1899, IS ON THE NATIONAL REGISTER OF HISTORIC PLACES





BRUCE HOLCOMB

# POWERING a VIBRANT FUTURE for VALLEY OUTREACH

Bruce Holcomb was the kind of board member who would personally measure the Valley Outreach parking lot when it needed to be resurfaced.



VALLEY OUTREACH HELPS PEOPLE MOVE THEIR LIVES FORWARD THROUGH BASIC NEEDS SERVICES LIKE FOOD PROGRAMS AND STYLEXCHANGE CLOTHING THRIFT STORE, AND PERSONALIZED SUPPORT INCLUDING HOMELESSNESS PREVENTION AND CONNECTION TO ADDITIONAL COMMUNITY RESOURCES.

**Agency funds** like the Valley Outreach Vibrant Future Fund are established at SCVF by nonprofit organizations for their own benefit. SCVF stewards those funds, expertly investing these assets for the long-term, so our nonprofit partners can focus on their important missions.



“I miss Bruce,” said Jess Hauser, Director of Communications at Valley Outreach, where Bruce served as a board member for nine years and stayed on as an active volunteer for many more. “He was such a smart, thoughtful, kind, strategic human. He was such an asset to Valley Outreach.”

For many years, Bruce encouraged Valley Outreach to open an agency fund at SCVF – a sophisticated option, as he liked to call it. Now called the Valley Outreach Vibrant Future Fund, the agency fund allows donors to make gifts that SCVF stewards. Each year, the fund’s earnings are available to support Valley Outreach, providing a stable, ongoing source of support for the necessary work of helping people move their lives forward through basic needs services and personalized support.

In its 41 years, Valley Outreach has grown to much more than a food shelf, now offering a clothing program, case management, financial assistance and connection to a broad swath of additional community resources. Valley Outreach relies on donations of all kinds, from one-time gifts and annual contributions to volunteer hours, shelf-stable food donations, and clothing items for their thrift store, StyleXchange.

“We served 31,400 individuals last year,” said Director of Development Ed Nelsen. “It’s amazing we were able to meet that need, but it’s also a real concern that 31,400 people needed that help. At the same time, it’s a real joy that our donors and volunteers show up to make this work happen so we can meet that growing need.”

As the need for their services has grown, Valley Outreach has had to get creative. Thanks to Bruce’s vision for the Vibrant Future Fund, they can now offer

donors another way to get involved. Before he died in October of 2023, Bruce saw his vision come to fruition.

“It’s difficult for smaller organizations to figure out how to position ourselves for donors in ways they trust and offer them additional ways to give. Especially gifts that will support our work in the future,” said Chief Executive Officer Tracy Maki\*. “It was really important for us to have a partner in that work because we’re not the experts, and St. Croix Valley Foundation is. We’re not worried about the investment strategy, we’re not worried about reporting. It’s just baked in and ready to consume, and our donors responded beautifully.”

Valley Outreach has several ideas for ways to use grants from the Vibrant Future Fund in years to come. In a responsive field like human services, the fund could help provide basic needs such as food and clothing; it could help fund additional staff positions, which represent Valley Outreach’s largest expense; or it could be used to invest in a need not yet known. Whatever needs may arise, the long-term, flexible Vibrant Future Fund will be there.

“Donors are thrilled to be able to have this additional vehicle,” said Ed. “They love Valley Outreach and the fact that their gift will have long-term implications. So it’s wonderful for the donor, it’s wonderful for Valley Outreach and ultimately for the future clients that may need it.” ■



# FOREVER SUPPORTING HER COMMUNITY:

## Jennifer's Story



JENNIFER TURRENTINE

More than anything else, Jennifer Turrentine values the people in her life.

She has rich family ties, neighbors she knows well and cares for, and a cherished group of lifelong friends. Even more than the sunsets from her lakefront cabin's porch or the wildlife roaming her yard, Jennifer finds joy and meaning through connections with people.



Students proudly show off their pillow drive donations in front of *Faith House* shelter, run by NACF grant recipient Salvation Army of Burnett County.

PHOTO PROVIDED BY SALVATION ARMY



One way the Webster transplant has gotten to know people in her area is through volunteering.

*“Every couple of weeks, I work at the food shelf, and I just rotated off the board of Northwest Passage,” said Jennifer. “Volunteering is a really good way to meet people.”*

Jennifer has also served as board chair of the Northwest Alliance Community Foundation (NACF), an SCVF affiliate community foundation that serves northern Polk and all of Burnett Counties. Jennifer sees many opportunities to enhance the quality of life in that area. According to the United Way, around 33% of households in Polk County and 41% of households in Burnett County make incomes below what is needed to afford the cost of basic expenses.

For several years, Jennifer led NACF’s nonprofit education efforts, and she currently leads the grants committee. Watching those grants reach nonprofits in her community brings her joy and reminds her that grants can have a significant impact for the nonprofits that receive them.

*“As an aging baby boomer, I was thrilled that we were able to fund a handicapped-accessible door for the Webster Senior Center,” said Jennifer. “We were also able to grant dollars to both the Burnett County Workforce Resource Center and the Salvation Army for kids aging out of foster care. We’ve been able to help*

organizations that help our population pay for utility bills and install ramps into their houses and provide car rides to the doctor’s office and put food on people’s tables. You realize there are needs that we take for granted, and that other people can’t take those things for granted. We can all help with those things.”

Recently, Jennifer decided to personally help her community forever by donating \$100,000 to NACF’s endowment fund. The generous gift will allow NACF to continue making grants to nonprofits with limited resources that are doing a “yeoman’s job,” as she puts it. Because Jennifer is donating to the endowment fund, she knows her gift will be wisely invested by SCVF and that the earnings will directly grant dollars to those nonprofits forever.

*“I realize more and more the advantages I’ve had in life,” Jennifer explained. “I have family, friends and love. My parents believed in a good education, and they believed in me enough to know that I could make a good life for myself, and I have. By donating now to the endowment fund, knowing that a portion of that money will be used for grants, I get to see how my own money is being spent. That’s a thrill.”*

Jennifer also plans to leave a legacy gift through her estate to NACF, a gift she sees as an ongoing way to care for the community she has grown to love, even after she is gone. ■

*“I feel really strongly about supporting the work NACF does. I usually make my donations anonymously, but this time, I’m putting my name out there in the hopes of influencing other people to donate. I’m putting my money where my mouth is, because I want to make my little piece of this world just a little bit better. And I know a lot of other people do, too.” ~ Jennifer Turrentine*

**Legacy gifts** are most commonly made through an estate. Some legacy gifts are designated for specific purposes, while others are less restricted.

# LEANING into LEGACY

We are here to support you throughout your legacy planning journey.

Since 1995, legacy gifts to SCVF have not only provided much-needed ongoing support to nonprofits in our region; they have also ensured that legacy donors' philanthropic goals are met and cared for in perpetuity. Our team is dedicated to providing professional, trusted partnership for all who wish to make legacy gifts to SCVF through their estate.

Thank you to the Legacy Society members who have already committed to a legacy gift, ensuring that the causes they care about most will be forever supported.

## LEGACY SOCIETY MEMBERS

ANONYMOUS (12)  
DON ANDERSON  
JEFFREY & JEANNIE AWS  
JUDIE\* & DAVID FOSTER BABCOCK  
JON & METTA\* BELISLE  
DAVID H. & SANDY J. BRANDT  
MARK & NANCY BULEY  
KAREN CARPENTER & FRED GRIMM  
BOB\* & SUE\* COLLINS  
DONNETTE DIERS & GREG WHEELOCK  
BYRON & VICKI DOPKINS  
DAVE & DEBRA DZIUK  
BRAD & JESSICA EHRlichMANN  
STEW & VICKY ERICKSON  
TIM & VALLIE ERICSON  
EVELYN M. EVERTS\*  
RANDY S. FERRIN & KATHY S. TROMBLY-  
FERRIN  
JIM & JUDY FREUND  
SUE & JOHN GERLACH  
JAMES\* & MARY GILLESPIE  
PETER GOODWIN  
KRISTA GRAVEN  
JILL GREENHALGH & ROLF DITTMANN  
MARJORIE & ROGER HAGEN  
JOANN HALLQUIST  
KAREN & CRAIG HANSEN  
SHERRY HANSON & MARY CLARE HUBERTY\*  
KEN\* & LYNN HEISER  
GREG & ROZ HENSRUD  
LESLIE HESSLER  
DEBORAH & STEVEN ITOH  
NATE & LINDA JACKSON  
NICK & MEGAN JACKSON  
NORMAN M. & NANCY J. JENSEN  
SCOTT & KATY JONES

GARY KELSEY  
MELANIE KLEISS  
BARBARA BANCROFT UPPGREN KLEMME\*  
KATRINA LARSEN & MARK MEYDAM  
NAN LEEKLEY  
HEATHER LOGELIN  
JIM & SHEILA LUTIGER  
JEAN SCHEUERMAN MACDONALD  
PAT MCKERNON\*  
HAROLD C. MEISSNER\*  
CHRISTINE M. MOELLER  
ELLEN NEUFELD & DALE YOUNG  
EDDIE\* & DONALD\* OLSON  
MITZI OLSON\*  
THYRA S. OSTRAND\*  
ALAN PARK\*  
MICHELE PIERCE  
BARB RAMBERG  
ROSEMARY REITER\*  
MARGARET HALL RUSSELL\*  
GLORIA SELL  
JILL SHANNON  
IRENE E. SIMON\*  
ROY & LANA SJOBERG  
STEVE & ERIN SMILLIE  
RICHARD STERBENZ\* & MARTIN RYAN\*  
ALENE STRANIK  
NYDA\* & EARL\* SWANSON  
DAN & TRACI TAKKUNEN  
DAN & KRIS TJORNEHOJ  
JENNIFER A. TURRENTINE  
BLAISE & SUZANNE VITALE  
DICK\* & GEORGIA WHITCOMB  
STEVE & TERRI WILCOX  
JANE RAE WILKENS

ESTABLISHING A  
PHILANTHROPIC LEGACY DOES  
NOT HAVE TO BE COMPLICATED

It often starts with a simple  
phone call: 715.386.9490

Our team is here to support you  
in any way we can. Contact our  
donor support team today :

### Jill Leonard

Director of Philanthropic Services  
[jleonard@scvfoundation.org](mailto:jleonard@scvfoundation.org)

### Heather Logelin

President and CEO  
[hlogelin@scvfoundation.org](mailto:hlogelin@scvfoundation.org)

### Sally Hermann

Philanthropic Services Associate  
[shermann@scvfoundation.org](mailto:shermann@scvfoundation.org)



Scan to access  
**NOTIFICATION**  
of **INTENT** form

\* DECEASED

Current list as of November 24, 2024.  
Please contact SCVF if any errors  
or omissions have occurred.



ST. CROIX VALLEY FOUNDATION

# OUR AGENCY FUND PARTNERS

These organizations have partnered with SCVF to establish long-term funds that will forever support their missions.

AMERICAN LEGION - FLETCHER PECHACEK POST 121  
AMERY AREA PUBLIC LIBRARY  
ARNELL MEMORIAL HUMANE SOCIETY  
ARTREACH ST. CROIX  
BALDWIN-WOODVILLE AREA COMMUNITY FOUNDATION  
BIG BROTHERS BIG SISTERS OF NORTHWESTERN WISCONSIN  
BOUTWELLS LANDING  
BOYS CAMP OF HUDSON  
BRIDGE FOR COMMUNITY LIFE  
CANVAS HEALTH  
CARPENTER ST. CROIX VALLEY NATURE CENTER  
CHI ALPHA SIGMA  
CHISAGO LAKES SCHOOL DISTRICT  
CHRISTIAN COMMUNITY HOMES & SERVICES  
CITY OF RIVER FALLS  
COMMUNITY HOMESTEAD  
COMMUNITY THREAD  
COURAGE KENNY REHABILITATION INSTITUTE - ST. CROIX CROIXDALE  
CURIO DANCE & SCHOOL  
ENDEAVORS ADULT DEVELOPMENT CENTER  
EZEKIEL LUTHERAN CHURCH  
FAMILY RESOURCE CENTER ST. CROIX VALLEY  
FAMILYMEANS  
FIRST LUTHERAN CHURCH  
FORWARD: THE RIVER FALLS PUBLIC SCHOOLS EDUCATION FOUNDATION  
FREDERIC ARTS  
FREDERIC PUBLIC LIBRARY  
FRIENDS OF INTERSTATE PARK  
FRIENDS OF THE AMERY PUBLIC LIBRARY  
FRIENDS OF THE ST. CROIX FALLS PUBLIC LIBRARY  
FRIENDS OF WILD RIVER STATE PARK  
GRACE PLACE - SALVATION ARMY ST. CROIX COUNTY  
HASTINGS PUBLIC SCHOOLS  
HAZEL MACKIN LIBRARY ASSOCIATION  
HOLY TRINITY ORTHODOX CHURCH  
HUDSON FIRE DEPARTMENT  
HUDSON HOSPITAL FOUNDATION  
INTERFAITH CAREGIVERS OF POLK COUNTY  
KINNICKINNIC RIVER LAND TRUST  
KINSHIP OF POLK COUNTY  
LAKES CENTER FOR YOUTH & FAMILIES  
LAKES UNITED FC  
LANDMARK CONSERVANCY

LUCK AREA HISTORICAL SOCIETY  
LYN OLSON MEDICAL CRISIS PROGRAM  
MARINE LIBRARY ASSOCIATION  
NEW RICHMOND HERITAGE CENTER  
NEW RICHMOND SOCCER CLUB  
NORTH BRANCH AREA EDUCATION FOUNDATION  
NORTH END COMMUNITY FOUNDATION  
NORTHEAST RESIDENCE  
NORTHERN STAR SCOUTING  
NORTHWEST PASSAGE  
OPEN CUPBOARD  
OSCEOLA COMMUNITY HEALTH FOUNDATION  
OUR SAVIORS LUTHERAN CHURCH  
THE PARTNERSHIP PLAN FOR STILLWATER AREA SCHOOLS  
THE PHIPPS CENTER FOR THE ARTS  
PIERCE COUNTY HISTORICAL ASSOCIATION  
PILGRIM LUTHERAN CHURCH  
RIVER FALLS LIBRARY FOUNDATION  
RIVER VALLEY RIDERS  
RUSH CITY EDUCATION FOUNDATION  
SCANDIA ELEMENTARY ENRICHMENT FOUNDATION  
SOMERSET PUBLIC LIBRARY  
ST. CROIX ANIMAL FRIENDS  
ST. CROIX FESTIVAL THEATRE  
ST. CROIX VALLEY FOOD BANK  
ST. CROIX VALLEY SART  
ST. PAUL EPISCOPAL CHURCH  
STANDING CEDARS COMMUNITY LAND CONSERVANCY  
STAR EDUCATION FOUNDATION  
STILLWATER LIONS CLUB FOUNDATION  
STILLWATER PUBLIC LIBRARY  
STILLWATER PUBLIC LIBRARY FOUNDATION  
STILLWATER SCHOOL DISTRICT ECFE & ECSE  
TURNINGPOINT FOR VICTIMS OF DOMESTIC & SEXUAL VIOLENCE  
UNITED WAY OF WASHINGTON COUNTY EAST  
UNITED WAY ST. CROIX & RED CEDAR VALLEYS  
VALLEY OUTREACH  
VILLAGE OF DRESSER  
WASHINGTON COUNTY HISTORICAL SOCIETY  
WEBSTER EDUCATION FOUNDATION  
WEST CAP  
WILD RIVERS CONSERVANCY OF THE ST. CROIX & NAMEKAGON  
YMCA HUDSON  
YOUNG LIFE ST. CROIX VALLEY  
YOUTH SERVICE BUREAU

# ST. CROIX VALLEY FOUNDATION FINANCIAL HIGHLIGHTS

|                                      | 2024                 | 2023                 |
|--------------------------------------|----------------------|----------------------|
| <b>TOTAL ASSETS</b>                  | <b>\$ 99,265,159</b> | <b>\$ 87,460,404</b> |
| <b>TOTAL REVENUE</b>                 | <b>\$ 20,029,436</b> | <b>\$ 17,103,908</b> |
| <b>EXPENSES</b>                      |                      |                      |
| GRANTS AND SCHOLARSHIPS              | \$ 5,769,571         | \$ 4,905,220         |
| <b>FUNCTIONAL EXPENSES</b>           |                      |                      |
| PROGRAM                              | 1,833,680            | 1,618,092            |
| FUND DEVELOPMENT                     | 108,712              | 136,661              |
| MANAGEMENT AND GENERAL               | 514,127              | 513,902              |
| <b>TOTAL EXPENSES</b>                | <b>\$ 8,226,090</b>  | <b>\$ 7,173,875</b>  |
| <b>CHANGE IN NET ASSETS</b>          | <b>\$ 11,803,346</b> | <b>\$ 9,930,033</b>  |
| <b>NET ASSETS, BEGINNING OF YEAR</b> | <b>87,314,246</b>    | <b>77,384,213</b>    |
| <b>NET ASSETS, END OF YEAR</b>       | <b>\$99,117,592</b>  | <b>\$ 87,314,246</b> |

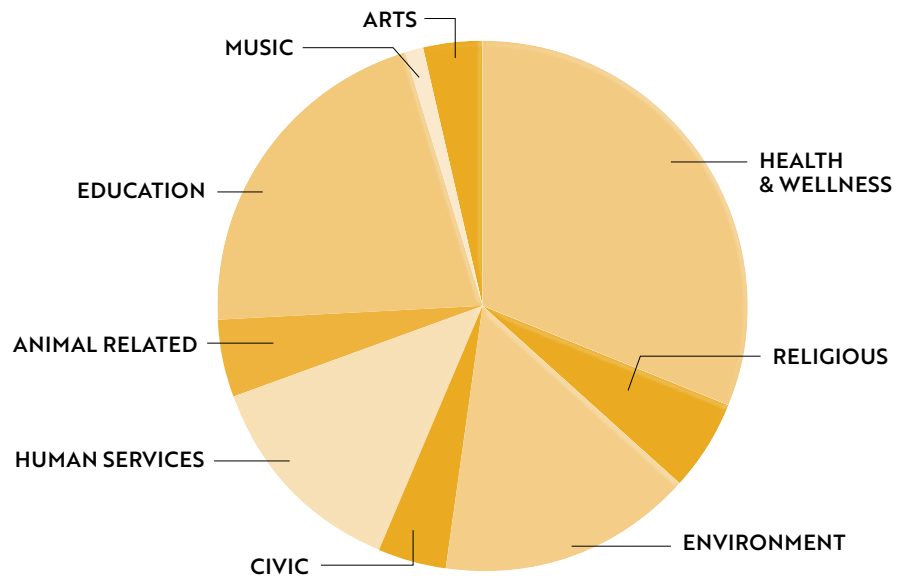


IRS FORM 990 IS AVAILABLE ONLINE AT [SCVFOUNDATION.ORG/PUBLICATIONS](https://scvfoundation.org/publications) OR BY SCANNING THE QR CODE ABOVE

## JULY 1, 2023 - JUNE 30, 2024 EXTERNAL GRANT & PROGRAM AREAS

|                |                  |               |
|----------------|------------------|---------------|
| ANIMAL RELATED | \$ 276,591       | 4.8%          |
| ARTS & CULTURE | 205,145          | 3.6%          |
| CIVIC          | 236,012          | 4.1%          |
| EDUCATIONAL    | 1,213,433        | 21.0%         |
| ENVIRONMENTAL  | 895,902          | 15.5%         |
| HEALTH         | 1,803,348        | 31.3%         |
| HUMAN SERVICES | 762,857          | 13.2%         |
| MUSIC          | 57,807           | 1.0%          |
| RELIGIOUS      | 318,475          | 5.5%          |
| <b>TOTAL</b>   | <b>5,769,570</b> | <b>100.0%</b> |

## FISCAL YEAR 2024 GRANTS



FIGURES LISTED ARE UNAUDITED AND INCLUDE FUNDS HELD AS AGENT AND EXCLUDE INTERFUND TRANSFERS. ADDITIONAL AUDIT REPORT INFORMATION IS AVAILABLE UPON REQUEST.



# YOUR PHILANTHROPY YOUR WAY

Donations to SCVF, including gifts to our affiliate community foundations, help enhance the quality of life for the people that call this region home. We offer a wide variety of ways to donate, all of which are reinvested in the communities and causes our donors care about most.

## WE ACCEPT

- OUTRIGHT GIFTS
- APPRECIATED STOCK
- IRA DISTRIBUTIONS
- REAL ESTATE
- PRIVATE FOUNDATION ASSETS
- BEQUESTS
- LIFE INSURANCE POLICIES
- CHARITABLE REMAINDER TRUSTS
- CHARITABLE LEAD TRUSTS
- CHARITABLE GIFT ANNUITIES
- CRYPTOCURRENCY

### FINANCE & INVESTMENT COMMITTEE

DENNIS DUERST (CHAIR)  
DAVE DZIUK (VICE CHAIR)  
GREG BERNARD  
MARK BULEY  
JESSICA EHRLICHMANN  
CATHY JENSON  
BUCK MALICK  
ERIC NEALY  
NICOLE TIETEL

### INVESTMENT ADVISOR

FUND EVALUATION GROUP, LLC  
RICHARD GRZYMAJLO,  
MANAGING PRINCIPAL/OCIO ADVISOR

### INDEPENDENT AUDITOR

AKINS HENKE & COMPANY

### FINANCIAL INSTITUTION

FIRST STATE BANK & TRUST

## FUND OPTIONS

### UNRESTRICTED ENDOWED FUNDS

empower SCVF board, staff and community partners to put resources where the need is greatest. No one knows what the next emergency may be, but gifts to unrestricted endowed funds – whether given today or through a bequest – provide the most flexibility and responsiveness.

### FIELD OF INTEREST ENDOWED FUNDS

let you designate your gift for specific grantmaking areas, like the environment, music education, health and wellness, the arts, early childhood development and more. SCVF board, staff and volunteer committees work hard to advance opportunities and programs within your area of interest forever.

### DONOR ADVISED/ DONOR DESIGNATED FUNDS

allow you to establish an individual, family or business fund within SCVF. If you already know which nonprofit(s) you'd like to support each year, a donor designated

fund makes your annual giving easy and automatic and (unlike a donor advised fund) can receive qualified charitable distributions (QCDs) from IRAs. Both offer tax advantages. Donor advised funds can be endowed or non-endowed.

### GIFTS TO YOUR LOCAL AFFILIATE

can support one of our ten affiliate foundation's grantmaking in your hometown.

### AGENCY FUNDS

support the nonprofits for which the fund was established. By taking advantage of SCVF's expertise in accepting complex gifts (such as appreciated stocks, IRA QCDs, real estate, etc.), investment protocols, and economies of scale, nonprofits partnering with the SCVF on agency funds will have a long-term source of funding for programs, capital or operating needs.

### SCHOLARSHIP FUNDS

directly support students furthering their education. Each of our 70 scholarship funds fulfills a heartfelt legacy in support of educational advancement.

### INVESTMENT OPTIONS FOR LONG-TERM FUNDS

The St. Croix Valley Foundation offers two distinct investment options for our advisors of long-term funds: traditional or socially responsive investing. The socially responsive Environmental, Social, Governance (ESG) option generates comparable returns while also considering environmental stewardship, societal impact and corporate governance.

Learn more at  
[SCVFoundation.org/esg](https://SCVFoundation.org/esg)

 ST. CROIX VALLEY  
FOUNDATION  
1830 HANLEY RD STE 200  
HUDSON, WI 54016

NON-PROFIT  
ORGANIZATION  
US POSTAGE  
**PAID**  
LMMAIL

\$7.1MILL

TOTAL CONTRIBUTIONS  
TO SCVF IN 2024

\$5.8MILL

TOTAL GRANTS &  
SCHOLARSHIPS DISTRIBUTED

\$99.2 MILL

TOTAL PHILANTHROPIC  
ASSETS

510

CHARITABLE  
FUNDS

Thank you for partnering with  
St. Croix Valley Foundation,  
where we support legacies in action by  
building endowment funds.

[INFO@SCVFOUNDATION.ORG](mailto:INFO@SCVFOUNDATION.ORG)

715.386.9490

[SCVFOUNDATION.ORG](http://SCVFOUNDATION.ORG)

**CFNS**  
ACCREDITED  
FOUNDATION



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SUPPORT FROM

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