



The St. Croix Valley Foundation was founded in 1995

to foster local philanthropy and respond to community needs. In 2021, the Foundation continued to build relationships with individuals and organizations throughout the region, facilitating grants of nearly \$5 million to trusted nonprofits in the St. Croix Valley and beyond.

LOCAL FUNDING FOR LOCAL NEEDS

The St. Croix Valley Foundation partners with and supports ten hard-working, volunteer-led affiliated community foundations throughout the Valley.







Dear Friends,

programs we care most about.

your philanthropic legacies.

Together. Forever.

KATRINA LARSEN



HEATHER LOGELIN PRESIDENT

Philanthropy is rooted in optimism, in the understanding that

while challenges will always exist, so too will the wherewithal to

respond. Philanthropy and optimism are intertwined with trust -

trust in local nonprofits whose missions prioritize the places and

Optimism is fed by a personal sense of purpose, vision and

a proven antidote to the effects of depression and anxiety.

confidence. Sadly, throughout our region, many are feeling the

combined effects of isolation, economic hardship, and difficulty

seeing into an unknown future. Therefore, mental health services

remain a region-wide priority. Also, parks and natural areas have

become more important than ever – as a respite from stress and

The St. Croix Valley Foundation is proud to partner with so many

of you in your optimism and honored to be the caretakers of

trua darsen Hatte K. Lozge:

P.S. If you'd like to talk more about your legacy and the causes

nearest to your heart - we are always here for you!

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MESSAGE from the BOARD CHAIR

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ON THE COVER: Christian Community Home residents Pat Larson (I) and Meredie Danielson (r) enjoy a ride in "Trisha" the Christian Community Home (CCH) tri-shaw. CCH volunteer Lana Sjoberg of Hudson peddles the e-assist cab. This popular tri-shaw is used by both the Hudson and Osceola CCH. When CCH initially explored the possibility of securing a tri-shaw for its residents, they contacted the St. Croix Valley Foundation to help connect donors to the project. Recently, the Stillwater Area Community Foundation, an affiliate of the St. Croix Valley Foundation, provided grant funding for a project to make a similar tri-shaw available to seniors in the Stillwater area.





Catching up with Lana Sjoberg is not an easy task. Known in Hudson as *The Hat Lady*, Lana's creations have brought joy and creativity to many. In warmer months you can find her bringing another type of joy; as the power behind Christian Community Homes' (CCH) tri-shaw bicycle.

Lana credits her parents, Loren and Edie

Sultze, with her foundational values of hard work, the power of education, and always giving back. In 2014, Loren and Edie moved to CCH Hudson to be nearer to Lana and her husband, Roy. Lana says that the staff at CCH brought joy to her parents in countless ways. After Loren died, Edie sought a way to continue the joygiving. As an attorney, Roy had worked with the St. Croix Valley Foundation with many clients over the years; so he suggested Edie reach out to explore options for supporting CCH caregivers and staff.

Edie knew that the staff at CCH were hardworking and vital to quality care for elders. She also knew that the road to advancement was usually tied to higher education, a goal often fraught with obstacles for lower wage staff. Edie worked with the St. Croix Valley Foundation to establish the endowed **Loren and Edie Sultze Scholarship Fund**, providing annual scholarships to Certified Nursing Assistants (CNAs) and other employees of CCH looking to improve skills, training, and career opportunities.

Edie took great joy in presenting the scholarships until she passed away in 2019. As the successor advisor to the fund, Lana now has the privilege of continuing her parents' legacy of joy-giving and providing a helping hand to CCH staff members.

Lana and Roy have followed Edie's philanthropic lead. As long-time Valley residents who raised sons Christopher and David in Hudson, Lana and Roy established an endowed fund with the St. Croix Valley Foundation in 2021. They have also made provisions in their estate plan for additional gifts that will continue the legacy of giving back, bringing joy, and making a difference!

Foundation awarded \$1000 scholarships to Tiffany Hayes, Megan Merricks and Haeli Prokop. In 2021, due to the extraordinary year and the unrelenting desire of scholarship applicants to further their education despite life's challenges, the St. Croix Valley Foundation used undesignated scholarship dollars to award additional \$500 scholarships to deserving applicants not covered by other CCH scholarship programs. As a result, and thanks to the generosity of local donors, every CCH employee who sought assistance with educational expenses received a scholarship in 2021.

BENEFITING The People Behind Us

Evelyn M. Everts left a gift to forever care for the community and river she loved



PRESCOTT, WISCONSIN

When Evelyn Malueg met Rolland Everts, they didn't have much but a willingness to work incredibly hard together. It was Rolland's father who, in 1939, suggested that the young couple purchase land along the Mississippi River at Hager City, about 20 miles south of Prescott. They made the purchase and began building wooden boats and a fishing business. Around this same time, the Corps of Engineers completed Lock and Dam #3 and #4, creating a "pool" of spawning springtime Walleye near the Everts Resort. Word spread quickly of the homey fishing camp with trophy Walleye and wonderful hospitality, drawing guests from the Twin Cities, Chicago, throughout Wisconsin and beyond. The Everts also worked the river commercially, harvesting carp and drum fish. It was a joyous, hard-working, good life for Evelyn and Rolland, firmly rooted in knowledge of the river and nature's rhythms.

In 2002 Rolland died at the age of 93. As Evelyn looked ahead, she opted to put part of the land that she and Rolland originally purchased from Pierce County into her will. She directed that the land be sold upon her death with proceeds used to establish an endowed fund to support two entities – the **Prescott Foundation** (an affiliate of SCVF) and the **Great River Road Visitor and Learning Center** (also in Prescott).

Evelyn died in 2019 at the age of 103. Her generosity and belief in giving back resulted in the Evelyn M. Everts Fund, an endowed fund established with over \$400,000. Investment earnings from this legacy fund will forever support the Prescott Foundation's local grantmaking and the Great River Road Visitor and Learning Center's role as stunning river-side destination and historic & educational resource for locals and visitors alike.

"People must realize that we have to keep this river clean because it has to be here for the coming generations. It's not just for you and I, it's for the people behind us." ~ Evelyn Everts

"Well I must say this, that every penny that I've got in my pocket has been earned off of the Mississippi River." ~ Evelyn Everts



LISTENING & LEARNING

In the days and weeks following the May 2020 killing of George Floyd, Minneapolis became the epicenter of an international movement for racial justice. From the overpass in Hudson, WI the red glow from fires set in Minneapolis could be seen for days. And yet, in the St. Croix Valley life seemed relatively peaceful.

That summer planning was underway for the St. Croix Valley Foundation's long-running Conversations of the Valley speaker series. The planning committee was hearing from stakeholders—"How do race issues impact us here in the Valley?" A discussion of racial justice needed a local forum. It was time for race to be talked about, not from the perspective of diverse urban communities like Minneapolis, but as it relates to predominantly white, suburban and rural communities like those throughout the St. Croix Valley.

Racial Justice – Listening and Learning became the theme of the series. COVID-19 restrictions pushed the presentations to Zoom (free of charge thanks to the generous sponsorship of First State Bank and Trust). Participation exceeded all expectations – Valley residents were ready to have meaningful and at times challenging discussions about race, inclusion, equity and opportunity within Valley communities.

Each presentation was opened by a young person of color who shared personal experiences of attending school in the Valley and challenges faced because of their race.

The four speakers dove into topics of privilege, systemic racism, historic frameworks for discrimination, and tools for teaching children in bias-free classrooms. Audience members were challenged to see the world from different viewpoints – sparking the kinds of conversations that ultimately can lead to meaningful change.





JASON JACKSON

DR. BILL GREEN





DR. GWEN WESTERMAN

ALEXS D. PATE

Convening, or bringing people and organizations together around shared concerns, is a core tenant of the St. Croix Valley Foundation.

By working with community members to identify and discuss emerging needs, the St. Croix Valley Foundation brings nonprofit organizations, community leaders and donors together to listen, learn and form a response – impacting the quality of life for all in the St. Croix Valley.

We thank each of our speakers for their insights on racial justice.

We also thank our teen participants for sharing their experiences. Sadiya Farah, Fatima Menawa, Maggie Odumuyiwa & Mya O'Connell



Stillwater Area Community Foundation Supports Change

The Stillwater Area Community Foundation (SACF), an affiliate of the St. Croix Valley Foundation, sought to diversify its board after reading an open letter in which local high school students and alumni discussed experiences as students of color. The SACF board members saw the letter as a call to action, prompting a new grant in support of racial and social justice initiatives. The inaugural grant was awarded to Stillwater Area Public School's Early Childhood Family Education Program (ECFE) for a series of classes on *Parenting for Racial Justice*.

Marie and Matt Sprader were early participants in the ECFE program.

"The events of that summer really made it clear to my husband and I that we didn't know enough about racism for our own knowledge," explained Marie Sprader, "nor did we know how to talk to our kids and how to raise them to be the kind of humans we hope them to be. If we don't educate ourselves and do something about [systemic racism] nothing is going to change and people will continue to die."

The grant funding by SACF will expand the reach of the program allowing more families the opportunity to participate.





THE BASIS | THE FREUNDS | ESTABLISH A NEW | ENVIRONMENTAL FUND

In a world of competing charitable interests and needs, Jim and Judy Freund have created a philanthropic legacy that will impact what they care about most – forever. The St. Croix Valley Environmental Fund, seeded with a generous \$100,000 gift from the Freunds, will support projects and organizations engaged in environmental education and those working to promote, protect and restore the natural resources and character of the St. Croix Valley.

"The environment impacts livability, work-life balance, the economy, access to healthy food – everything. A well cared for, clean, diverse environment is at the core of everything the Valley represents." ~ Judy Freund

The St. Croix Valley Environmental Fund is an endowed *Field of Interest Fund*, enabling the Foundation to forever respond to the changing needs of the region within a defined area of focus. The Freunds recognized the need for a flexible funding source for environmental initiatives in the Valley. Their gift, vision, and passion has established a fund that welcomes others to join in the effort. Once the fund reaches \$500,000, the St. Croix Valley Foundation will launch a competitive grant program focused on the environment.

Heather Logelin, St. Croix Valley Foundation President, notes that *Field of Interest Funds* allow people to get involved in funding passion areas in a bigger way. "By pooling resources with others who share an interest, the impacts of your gift are multiplied." In addition to the environmental fund, the St. Croix Valley Foundation manages endowed Field of Interest Funds that impact the arts, music education, health and wellness, and animal welfare. In all cases, the St. Croix Valley Foundation coordinates the grantmaking process, convening review panels of local volunteers that evaluate applications and recommend grants.

The Freunds' decision to seed the St. Croix Valley Environmental Fund was grounded in experience, trust, and the realization that future needs can seldom be determined from the vantage point of the present. As a retired 3M Finance Director, Certified Management Accountant, and nonprofit board member and treasurer of the Carpenter St. Croix Valley Nature Center, Jim knows better than most the power of endowment. Judy, a retired Ed.D. education specialist, has served on the SCVF board since 2017 and has seen how the Foundation leverages endowed funds to support local nonprofits, improving quality of life throughout the Valley.

Jim and Judy have long been connected to the Valley. It is where they raised sons and introduced grandkids to all-season fun on the St. Croix River. It is also where they have invested time and energy to numerous local and regional initiatives. Jim and Judy's generous legacy will now forever protect and nurture the incomparable natural environment that is the St. Croix Valley.





CHANGING LIVES, STRENGTHENING FAMILIES

With optimism, professionalism and results, Youth Service Bureau (YSB) has been serving young people in need of intervention services, counseling, and resiliency training since 1977. With offices in Cottage Grove, Woodbury and Stillwater, YSB is a trusted partner to local school districts, school counselors, law enforcement and community organizations throughout the St. Croix Valley.

Youth Service Bureau has partnered with the St. Croix Valley Foundation since 2001 when YSB opened a long-term agency fund. Agency funds put the onus on the St. Croix Valley Foundation to invest and administer long-term assets, allowing nonprofits to focus on mission and programs. The YSB agency fund is a source of annual operating support for its programs.

In 2021, the St. Croix Valley Foundation, in conjunction with its 10 affiliated community foundations, determined that Mental Health and Substance Abuse should be a local and region-wide focus area – particularly in light of the additional stresses and impacts of the pandemic. This collaborative *Vibrant Communities Grant Program* determines a focus area (or areas) annually — and is made possible through donors who have generously entrusted the St. Croix Valley Foundation with unrestricted endowed gifts.

YSB's programmatic areas aligned with the mental health focus of the *Vibrant Communities Grant Program*. YSB's original initiative continues today; a Diversion Program to give kids who've made mistakes an alternative to the juvenile justice system and a second chance at getting back on track. Mental health is often a component of this program.

"Now I have a future, and a plan to get there. I appreciate YSB and the Bayport Police who believed and invested in me. I'm really glad that I got sent there." ~ Nate

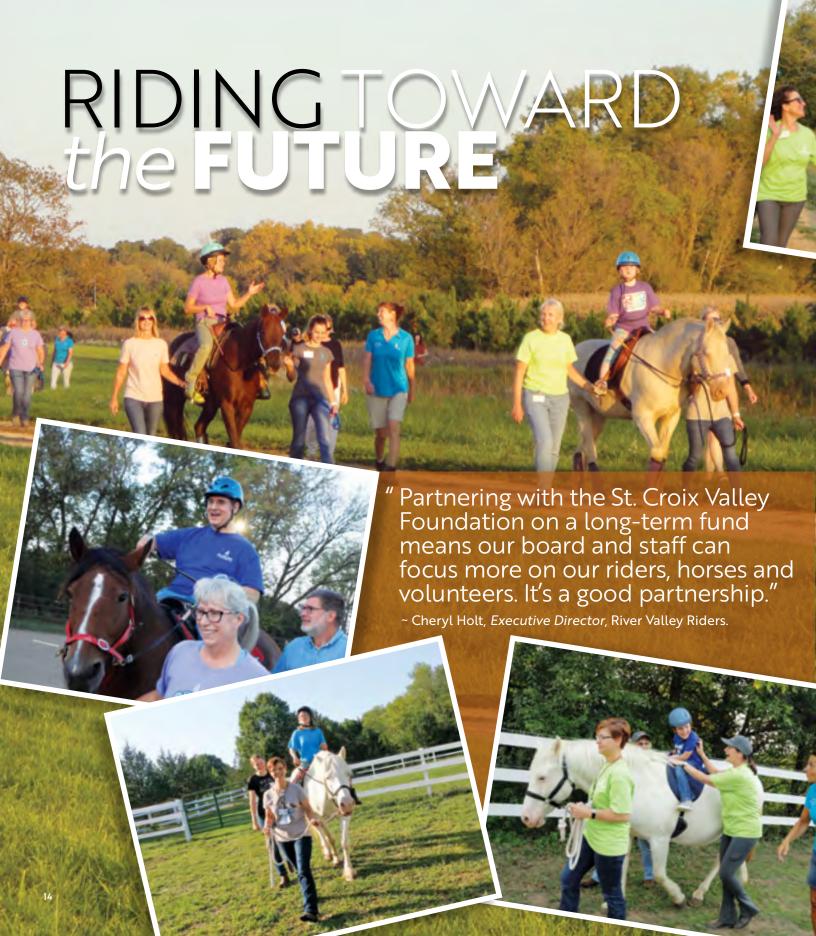
Nate's testimonial is not uncommon. Despite entering the program with ongoing drug use, underlying depression, and little initial interest in being helped, Nate has become an advocate for YSB.

Therapy services are also a key programmatic area for YSB; with licensed therapists helping kids deal with sadness, loneliness, anxiety, grief, identity issues, family relationships and a variety of social challenges. The professionals at YSB know that the best outcomes happen when family, school and community each play a role in supporting children in need of intervention. To that end, YSB received a \$10,000 COVID-19 Response Fund of the St. Croix Valley grant at the pandemic's onset, to ensure continuation of school and community-based programs during a time of high stress, uncertainty, and need.

YSB also offers youth chemical health services not as treatment, but as intervention – responding to emerging issues, choices, and behaviors before they become entrenched and difficult to shift. Through partnerships with three local school districts, YSB's school-based services reach a wide range of students. YSB believes this early intervention is critical, citing the alarming statistic that 9 out of 10 people with substance abuse issues started using before age 18.

In addition to Vibrant Communities Grant funding, YSB has received support from individual SCVF Donor Advised Fund holders, many of whom have personal stories of hope, help and new-found health for young family members because of YSB intervention programs.

The world has changed over the last 24 months. There has been turmoil and upheaval. The St. Croix Valley Foundation is proud to partner with those who continually counter upheaval with resolve, support, optimism, and generosity. ■





The St. Croix Valley is fortunate to have strong nonprofit organizations throughout the region. These nonprofits respond to both needs and opportunities, improving the quality of life for everyone who lives, works and plays in the Valley. One of these big-hearted nonprofits is River Valley Riders.

Established in 1999, River Valley Riders is an Afton, MN-based nonprofit with the mission of enriching the lives of children and adults with special needs by providing equine-assisted services.

River Valley Riders is moving steadily forward. Their leadership is guided by a long-range vision and long-range planning, including plans for a complete facility that will expand programming. While excited about expansion, River Valley Riders also established an agency long-term fund with

the St. Croix Valley Foundation in 2020 to ensure sustained funding for annual operating needs.

After partnering with the St. Croix Valley Foundation on a long-term fund, River Valley Riders learned of the Foundation's Consultants in Service program and soon invited the program's expert volunteers to share their knowledge. Two consultants spent time with River Valley Riders' leaders, training board members, guiding long-range planning,

and sharing best practices relevant to River Valley Riders' operations.

The goal of both partnerships with the St. Croix Valley Foundation – the volunteer consulting and the long-term agency fund – is to ensure that people with special needs and horses with gentle love can always work together to make magic moments happen.

The riding arena in Afton is a joyous place for participants, their families, volunteers, and horses. This past year, one of the St. Croix Valley Foundation's scholarship funds provided financial support for a young participant of River Valley Riders. The Bethany's Butterflies Scholarship Fund was established in memory of Bethany Mazur to help finance positive life experiences for children with special needs.

Donors, nonprofits and the St. Croix Valley Foundation – working together to ensure everyone is riding toward a brighter future.

"River Valley Riders is a great example of local expertise, connections, and generosity all mingling to foster life-changing experiences for people right here in the Valley."

~ Heather Logelin, *President*, St. Croix Valley Foundation

OUR MISSION

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

Encouraging charitable giving in the Valley

Building permanent funds that will provide resources for the needs of today and tomorrow

Connecting people and programs

Bringing together people's charitable interests and the funding needs of programs and organizations

Encouraging collaboration

Forming partnerships and providing servant leadership through programs that enhance the quality of life in our region's distinct communities



YOUR PHILANTROPY YOUR WAY - FOR YOUR COMMUNITY

When you donate to the St. Croix Valley Foundation or an affiliated community foundation, your gift gets reinvested – locally – impacting the people, places and programs close to home or closest to your heart.

WE ACCEPT

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

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INDEPENDENT AUDITOR

AKINS HENKE & COMPANY

FINANCIAL INSTITUTION

FIRST STATE BANK & TRUST

FUND OPTIONS

UNRESTRICTED ENDOWED FUNDS

Unrestricted endowed gifts enable the SCVF board, staff and community partners to put resources where the need is greatest. No one knows what the next greatest community need will be, but gifts to unrestricted endowed funds (today or as part of a bequest) provide the most flexibility and responsiveness.

FIELD OF INTEREST ENDOWED FUNDS

Field of Interest Endowed Funds let you designate your gift for specific grantmaking areas (the environment, music education, health and wellness, the arts, etc.). SCVF board, staff and volunteer committees will ensure your dollars work hard to advance opportunities and programs within your area of interest - forever.

DONOR ADVISED/ DONOR DESIGNATED FUNDS

By establishing a Donor Advised Fund, you essentially establish an individual, family or business foundation 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 can be endowed or non-endowed, and both offer tax advantages and a long-term plan for your philanthropic intentions.

FUNDS FOR YOUR LOCAL COMMUNITY FOUNDATION

Gifts to one of our ten affiliated community foundations directly support local grantmaking and programs impacting your hometown.

AGENCY FUNDS

Nonprofit organizations establish funds to take advantage of SCVF's expertise in accepting complex gifts (such as appreciated stock, IRA QCDs, real estate, etc.), investment protocols, and economies of scale – creating a long-term funding source for programs, capital or operating needs.

SCHOLARSHIP FUNDS

The St. Croix Valley Foundation is the experienced resource for donors who wish to establish scholarship programs. Each of our 70+ scholarship funds fulfills a heartfelt legacy in support of educational advancement.

INVESTMENT OPTIONS FOR ENDOWED FUNDS

The St. Croix Valley Foundation offers investment options for philanthropic fund advisors – 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

ST. CROIX VALLEY FOUNDATION FINANCIAL HIGHLIGHTS

The St. Croix Valley Foundation was founded in 1995 and is a 501(c)(3) nonprofit organization fully accredited by the Community Foundations National Standards Board and the Charities Review Council.

All donations made to the St. Croix Valley Foundation are tax deductible as allowed by law.

SINCE 1995, OVER \$100 MILLION HAS BEEN GIFTED TO THE SCVF

SINCE 1995, OVER \$43 MILLION HAS BEEN GRANTED TO NONPROFIT ORGANIZATIONS AND SCHOLARSHIP RECIPIENTS

NUMBER OF CHARITABLE FUNDS 488

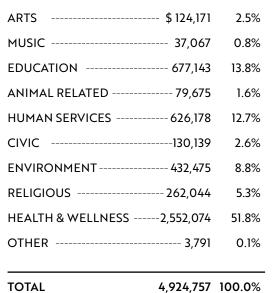
TOTAL ASSETS (FISCAL YEAR 2021) \$92,244,739 (UP \$22,209,439 FROM PREVIOUS YEAR)

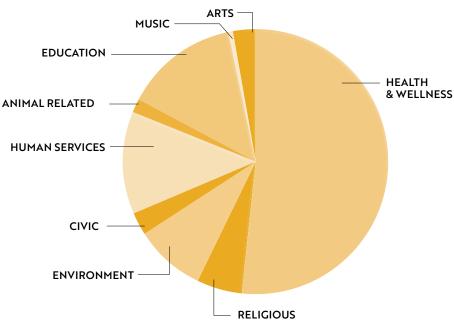
GRANTS & SCHOLARSHIPS (FISCAL YEAR 2021) \$4,924,757 (UP \$121,773 FROM PREVIOUS YEAR)

JULY 1, 2020 - JUNE 30, 2021

EXTERNAL GRANT & PROGRAM AREAS

FISCALYEAR 2021 GRANTS





The St. Croix Valley Foundation partners with and provides support to ten, volunteer-led, affiliated community foundations.

This network of hometown expertise encourages local philanthropy in response to local needs. The committed volunteers who serve these unique communities also regularly come together to share ideas and collaborate in response to region-wide challenges.

COMMUNITY-BASED PHILANTHROPY FROM **AFFILIATE FOUNDATIONS**

AMERY AREA

COMMUNITY FOUNDATION
AACF@SCVFOUNDATION.ORG

CHISAGO LAKES AREA

COMMUNITY FOUNDATION
INFO@SCVFOUNDATION.ORG
CLAC-FOUNDATION.COM

HUDSON

COMMUNITY FOUNDATION HCF@SCVFOUNDATION.ORG HCFWI.ORG

LOWER ST. CROIX VALLEY

COMMUNITY FOUNDATION
INFO@SCVFOUNDATION.ORG

NEW RICHMOND AREA

COMMUNITY FOUNDATION
INFO@NRACFOUNDATION.COM
NRACFOUNDATION.COM

NORTHWEST ALLIANCE

COMMUNITY FOUNDATION
NACF.HQ@GMAIL.COM
NACOMMUNITYFOUNDATION.ORG

PRESCOTT FOUNDATION

PRESCOTTWIFOUNDATION@GMAIL.COM COMMUNITY FOUNDATION PRESCOTTFOUNDATION.COM INFO@STILLWATERAREAF

RIVER FALLS

COMMUNITY FOUNDATION
RFCF@SCVFOUNDATION.ORG
RIVERFALLSCOMMUNITYFOUNDATION.ORG

SOMERSET

COMMUNITY FOUNDATION
CHAIR@SOMERSETCOMMUNITYFOUNDATIONWI.ORG
SOMERSETCOMMUNITYFOUNDATIONWI.ORG

STILLWATER AREA

COMMUNITY FOUNDATION
INFO@STILLWATERAREAFOUNDATION.ORG
STILLWATERAREAFOUNDATION.ORG

112 COMMITTED COMMUNITY LEADERS SERVE THESE AFFILIATE ORGANIZATIONS

DO YOU HAVE QUESTIONS?

Please contact the St. Croix Valley Foundation or your local Affiliate Foundation.

ST. CROIX VALLEY FOUNDATION

516 SECOND ST, SUITE 214, HUDSON, WI 54016 | 715.386.9490 | INFO@SCVFOUNDATION.ORG | SCVFOUNDATION.ORG



516 SECOND ST, SUITE 214 **HUDSON, WI 54016**

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

CHARITABLE FUNDS

GRANTED SINCE 1995 \$92 MILL

TOTAL PHILANTHROPIC ASSETS

Donor generosity drives community impact.

Thank you for supporting and partnering with the St. Croix Valley Foundation.

> INFO@SCVFOUNDATION.ORG 715.386.9490 **SCVFOUNDATION.ORG**











Achieve More, Together,*