



2019 A YEAR IN REVIEW

A SUPPLEMENT TO THE BIENNIAL
PHILANTHROPY REVIEW

Creatively Approaching Philanthropy

A MESSAGE FROM NANCY ZALLEK, PRESIDENT AND CEO



What a year! I am excited to have this opportunity to share that the Mankato Area Foundation (MAF) established our own “personal best” during this past fiscal year. We are proud of granting nearly \$1,000,000 through various MAF fund types which represents 388 grants providing support to a variety of organizations, projects and programs in our region. In this giving report, we share a sample of stories that explain how we facilitate local philanthropy, including one about a fund honoring the legacy of Kristine Lindvall, a beloved Mankato educator and another about a new partnership with the Blue Earth Nicollet County Humane Society (BENCHS).

The beauty of working with a community foundation is our capacity to be flexible and adaptable. We embrace our ability to approach philanthropy creatively—paying attention to new and unique ways to make a difference. Listed below are just a few of the innovative ways we have supported philanthropy in this region.

- **Shared Spaces—a Center for Nonprofit Collaboration.** (Profiled on back cover.) The doors opened in 2015, providing affordable office space and the synergy of an organizational hub. We’re now renovating the adjacent building to expand this concept and further develop a hub for local philanthropy (including MAF offices). Because of the generosity of this community and the overwhelming support for the nonprofit sector, Shared Spaces Philanthropy Center is planning to open in the spring of 2020.
- **Jonathan Zierdt Cancer Fund (JZCF).** MAF empowers a donor’s desire to make a difference. In this case, the unique result is the JZCF Caring Box program. These beautifully designed care packages, with a letter from founder, Jonathan Zierdt himself, are assembled by volunteers and distributed by oncology teams in our area to hundreds of individuals who have received a cancer diagnosis.
- **Recharge Mankato.** (Profiled on page three). Jon Olseth reached out to MAF regarding his desire to establish our region as a leader in the clean energy

movement. This was new territory for the Foundation, but we invested our capacity to convene the community and key stakeholders in 2018 and 2019. The initiative has captured statewide attention.

- **Women’s Giving Circle (WGC).** This organization launched in 2019 and is already exceeding expectations. Melanie VanRoekel and Laura Stevens presented MAF with a unique idea to champion and expand participation in local philanthropy. Their concept gathers women of all ages and backgrounds to support projects that uplift women and children in our community. In quarterly cycles, WGC members make contributions (as low as \$62.50 for those under 30), nominate groups for funding, then gather to learn about local programs impacting our region, evaluate funding nominations from members and distribute grants to those selected. In this first year, MAF will grant over \$40,000 from more than 120 WGC members to nonprofits in our area because of the thoughtfulness and creativity of these two community leaders.

Our community is changing, philanthropy is changing—at MAF, we promise to change with it, aligning the passion and vision of our donors, community members and nonprofits to champion that next great idea for our region.

For more information visit the Programs and Initiatives menu at mankatoareafoundation.com.



Leading the Charge

RECHARGE MANKATO—WHAT STARTED AS A SIMPLE IDEA HAS EVOLVED INTO A REGIONAL INITIATIVE WITH A PHILANTHROPIC TWIST.

In the spring of 2018, Jon Olseth walked into the MAF office with an idea.

"I want this region to lead the state in electric vehicle adoption," Jon told MAF President and CEO Nancy Zallek. "I think we need to create a Ride & Drive event in Mankato specifically for electric vehicles."

Before they knew it, what started as a simple idea quickly turned into a regional clean energy initiative: Recharge Mankato. The first Recharge Mankato event in October 2018 was a hit. Local owners of electric vehicles (EVs) were on-hand to answer questions and more than 160 people got a test drive or ride. Not only was it a spectacular way for members of the greater Mankato community to learn about these unique vehicles, it was an opportunity to bring together regional leaders in business, nonprofits, education and public policy for discussions about a clean energy future for our area.

For 2019, the organizing partners for Recharge Mankato—Mankato Area Foundation, Olseth Family Foundation, Minnesota State University, Mankato and South Central College—had even bigger goals. "Our first year was terrific, but we wanted to build on our momentum to create an event that would not only get more people behind the wheel of an EV, it would bring together key partners who are critical to our Recharge Mankato initiative. We wanted to continue to advance our goal of local EV adoption and infrastructure," Jon said.

This was accomplished by inviting community leaders and stakeholders to take part in a bus ride around Mankato on Minnesota's first and only (as of October 2019) electric school bus in the early morning at the start of the second annual Recharge event. They were amazed by the silent ride compared to the typical loud diesel engine. Invited speakers talked with the bus riders about the region's significant progress toward clean energy goals. Proposed clean energy legislation at the state level was reported on by Senator Nick Frentz and Joe

Sullivan, Deputy Commissioner for the Division of Energy Resources at the Minnesota Chamber of Commerce.

"The single biggest thing someone can do to reduce their carbon emissions today is to buy an electric vehicle," Joe said. "They're not great cars just because they don't use gas, they are better in every facet: safety, value and experience. They're just better vehicles."

Joe also shared that in his first three months of owning an EV, he spent only around \$300 in electricity to travel 8,500 miles including his commute from Mankato to St. Paul.

With more public outreach and increased exposure, more than 500 individuals had the opportunity to experience an EV during Recharge Mankato 2019. And there was a unique new philanthropic component: for every test drive, the Olseth Family Foundation made a donation to Mankato VEX Robotics—a club for kids and young adults to compete in building robotics.

"VEX Robotics was the perfect recipient as they are developing the clean energy leaders of tomorrow," Jon said.

But philanthropy at Recharge Mankato did not stop there. After getting excited about EVs in Mankato at the 2018 event, local business owner Tony Frentz wanted to help drive transformative action toward EV adoption. Tony and Jon purchased a Level 3 EV charger—currently the fastest chargers on the market—to be installed downtown in the brand new Eide Bailly Tower ramp next to the Shared Spaces building. Fitting their innovative personalities, they also decided to do something with EV chargers that is unprecedented across the country. They will



donate the Level 3 to MAF so that proceeds from each charge can benefit the community. Now, EV drivers will be able to "Power Up to Do Good," as the proceeds raised will be used to support unique programs focusing on innovation in this community. Furthermore, the City of North Mankato will install a Level 3 charging station on Commerce Drive, with the proceeds going to MAF in support of Fallenstein Field and Playground.

In a little over a year since Jon described his vision to Nancy, the greater Mankato area is planning to install four Level 3 chargers, with a number of Level 2s to boot. Once installed, the Mankato area will have the most EV chargers in the Midwest. This initiative has truly become a testament to what Mankato is able to achieve through creative collaboration and innovative thinking.

"I am amazed by what we have been able to accomplish through MAF's ability to convene thought leaders in this community," Jon said. "Through the efforts of our partners, we are helping to put this region on the clean energy map."



Continuing Her Legacy

BELOVED LOCAL EDUCATOR, THE LATE KRISTINE LINDVALL, CONTINUES TO MAKE A DIFFERENCE FOR GENERATIONS TO COME.

Sam and Jake Lindvall had a special relationship with their aunt, Kristine.

"What I remember most about Kristine is that she was always willing to listen and was always interested in what you had to say," Sam said. "It didn't matter how boring it may have seemed; she was interested and cared about what you cared about."

It was those values, they agree, that made their aunt a wonderful English teacher for so many young minds at Mankato West High School. While the boys, who grew up in Bloomington, were never formally taught by Kristine, they have each heard numerous former students share stories about her—their favorite teacher.

"If I were to choose a few key areas of what was important to Kristine, I would say education, the arts, the pursuit of learning and encouraging individuals to explore the world around them," Jake said.

When Kristine chose the Mankato Area Foundation (MAF) as a beneficiary of her estate, she named Sam and Jake as advisors to her donor advised fund and, therefore, responsible for overseeing her legacy of charitable giving. Kristine did not have children

of her own but was confident her two young nephews would, when needed, embrace the responsibility of advising MAF on granting projects and programs that aligned with her philanthropic goals.

Sadly, Kristine passed away much too young, just months after being diagnosed with lung cancer.

Sam and Jake, in their late teens at the time, were suddenly responsible for their aunt's legacy. After taking some time to process their loss, they were eager to work with the Foundation. "At first, it was a melancholy experience," Sam said. "But it was not overwhelming. I went into it with the determination to further Kristine's vision for her fund, as well as to do good in her name. I wanted to do right by my aunt. She gave my brother and me this significant responsibility, so we are going to make dang sure we do it right."

When the Lindvall boys met with MAF, the Foundation presented them with several programs that would align with Kristine's charitable intent. In the end, the decision was easy: Aktion Club Theatre, a collaborative community theatre focusing on issues of

disability. Their mission statement is "Where people, art and community partner for a brighter, more inclusive future for all."

"It was fascinating," Jake said. "It seemed like everything fell perfectly into place. The Foundation presented options, and Aktion Club Theatre was the obvious choice because of Kristine's love of the performing arts."

Jake and Sam are confident that Kristine would love both the club's mission and the fact that her legacy is helping their group make a difference for individuals in Mankato.

"Kristine's master's thesis focused on using performing arts for mentally challenged or disabled people," Jake said. "When my dad found that out, it brought him to tears. For us to have this opportunity presented to us was incredible—we knew immediately it was a good fit."

The grant will be used to support a theatre performance in 2020. Specifically, it will help them purchase a much-needed keyboard and sound equipment, in addition to hiring acting coaches and a songwriter. Wilbur Neushwander-Frink, who leads the local theatre group, got to know Kristine as her children's teacher at West High School and

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remembers how she encouraged her son to take up writing poetry.

"She was an amazing instructor and role model," Wilbur said. "I have always admired her and am very honored to have our group chosen as a recipient of her generous spirit." Wilbur intends to dedicate the performance in Kristine's memory and the Lindvall brothers plan to be sitting in the front row.

These two young men found themselves in a unique position to advise a legacy fund at such young ages. But with the help of the Foundation, their role was made easy and fun.

"The Foundation showed a lot of kindness and excitement," Jake said. "A clear, eager readiness to put things into action. They were clearly touched by Kristine, so we had a shared excitement for all of it. They were very proactive in putting it all together."

Sam added, "The Foundation is really good at what it does. Jake and I don't have to do a whole lot in order to get money to people we think deserve it. I'm actually just really grateful for the people that make that possible."

With the Foundation's management of the fund, Sam and Jake's role is simple.

"The decision-making process that Jake and I go through is, 'Would this make Kristine proud? Would she want this?'" Sam said. "And I know the answer here is absolutely."



Aktion Club Theatre Welcomes All To The Stage

Aktion Club is a service organization within Kiwanis International, with more than 12,000 members worldwide. Their mission is "to provide adults living with disabilities an opportunity to develop initiative, leadership skills and serve their communities."

The Mankato Kiwanis Club was looking to start an Aktion Club in 2006, at about the same time Wilbur Neushwander-Frink went to them for support to create an inclusive theatre group.

The result? The world's first Aktion Club Theatre!

Today, the club has 60 members of all abilities, ranging in age from six to 75, and Wilbur is the director and playwright for the group. The group welcomes individuals with physical disabilities, with autism spectrum disorder, with little to no ability to hear, see or speak—and even children who are passionate about inclusive theatre and whose only limitation is their very young age.

"This is not just about gaining theatrical skills, it's also about focusing on life skills that augment their daily lives," Wilbur said. Aktion Club Theatre helps actors learn and grow and broadens community understanding of their abilities.

"The legacy that Kristine left to our community is tremendous. For one actor, this grant helped fulfill a dream of writing a song. The confidence and pride of this actor has grown immensely. She just can't stop smiling and is excited to share her new song with our community AND with Jake and Sam next year."

After 13 years leading this outstanding group, Wilbur is touched by the opportunity a grant from the Kristine Lindvall Fund has provided.

"'Thank You' are two small words for such generosity, but we say those words with a heart full of gratitude for all of what Kristine accomplished in her life and now into the future through her donor advised fund."

A Paws-itive Opportunity

AS A POWERFUL PHILANTHROPIC TOOL, BENCHS' AGENCY FUND ALLOWS THEIR ORGANIZATION TO INVEST FOR THE FUTURE.



"This has been a wonderful way for us to promote planned giving. I am appreciative to the Foundation for giving us the peace of mind that our assets are professionally managed."

A little more than 15 years ago, the Blue Earth Nicollet County Humane Society (BENCHS) was in financial trouble. For several months, the organization was operating in the red. At one point, board members even generously opened their checkbooks to meet payroll, just to get by.

Susan Kroon, president of the BENCHS Board of Directors since 2006, said it was at that point they knew a change was needed. The group began to organize creative new fundraisers—such as their annual community garage sale or the charitable "5K9" fun run—and made a philosophical shift in how they managed their finances, with an emphasis on smarter spending and more efficient use of employees' time.

BENCHS has operated profitably ever since and has now begun to invest their money through an agency fund with the Mankato Area Foundation (MAF).

"Years ago, no one on the board could even envision that we would one day be investing money," Susan said. "But, now that we have conscientiously saved for a rainy day, we want to make sure we are being fiscally responsible with those investments."

Beginning in 2017, BENCHS investigated a new tactic as part of their financial

management. "We wanted to create a long-term investment strategy, but we also knew we didn't have the resources or the capacity to oversee an investment portfolio," Susan said. "That's when we decided to partner with the Foundation."

Through an agency fund, MAF pools and invests a nonprofit's money with the Foundation's assets, thereby providing professional management and the oversight of the MAF investment committee. "We believe a partnership of this type is about more than just financial management—it's about strengthening nonprofit organizations," said Nancy Zallek, MAF President and CEO. "By entrusting funds to MAF in this capacity, each organization is better able to focus their time and energy on their mission."

Susan said she immediately saw the value of working with the Foundation. "We don't always know when donations or legacy money is being given to us. In the past, when gifts came in, we used to put the money in the bank. But while we were doing that, we didn't feel we were always honoring our donor's intent. We felt we owed it to both our donors and the community to be better stewards of charitable gifts—while still planning for our future."

"We found that the MAF agency fund was the best way, in a conservative manner, to invest our money while knowing it was being tended to by investment specialists."

With the agency fund in place, BENCHS has a philanthropic tool to facilitate their donors' gifts and help them to increase their impact through sound financial management. Additionally, it serves as an "emergency cushion," which helps to strengthen grant applications to nationwide organizations.

"This has been a wonderful way for us to promote planned giving," Susan said. "I am appreciative to the Foundation for giving us the peace of mind that our assets are professionally managed. We're incredibly proud to be celebrating 50 years of helping homeless cats and dogs in this region find new homes. With the Foundation's help, we plan to celebrate 50 more!"

BENCHS is Greater Mankato's Most Successful Matchmaker

In January 2019, BENCHS hired Andrew Burk as their first-ever executive director. With several years of experience in corporate positions, it was Andrew's dog that inspired his career change into what he calls "the best job I've ever had."

"I've always had rescue dogs. Realizing what they have done for my life changed my outlook on what I wanted to do in my career; I wanted to do something that gave back to the community."

BENCHS certainly gives back to the community. In 2018, 1,300 dogs and cats were adopted from the shelter into new, loving homes. This year, they are on pace to match or even surpass that number.

In his first year at the helm, Andrew has already overseen several improvements, including reaching 100 percent pre-adoption spays and neuters, a brand new on-site surgery suite and a Dog Enrichment Program, which will keep track of dogs' habits, interests and behaviors in order to make the adoption process even more successful. "With the Dog Enrichment Program, we can find the best match for an owner and their new pet," Andrew said.

Andrew knows the impact that a pet can have on our lives. "My last dog changed my life, and that's what I want to do for more people at BENCHS," Andrew said. "I wanted to be here to help people feel the same way I did—I'm not saving a dog's life; that dog is saving my life."

With the help of the Foundation's agency fund, Andrew and BENCHS know their money is being cared for so they can focus on finding pets new homes.

"I applaud the board's decision to create an agency fund at MAF," Andrew said. "We couldn't do what we do without community support. Whether it is volunteering 10 minutes or making a financial contribution, the greater Mankato region has done a phenomenal job of supporting BENCHS."



Building Update

THE GENEROSITY OF TWO LOCAL
BUSINESSMEN ALLOWS EXPANSION
OF SHARED SPACES.



When the Mankato Area Foundation (MAF) opened Shared Spaces in 2015, the vision was to increase the capacity, collaboration and effectiveness of the region's nonprofit sector to support a healthy, vibrant and growing Mankato area community.

Nearly four years later, many of the organizations housed in Shared Spaces have expanded their regional footprint, grown their staff and now require additional space. Aware of the circumstances, Tony Frentz and Rob Else approached MAF about donating the adjacent building behind Tandem Bagels. Conveniently located, the two-story multi-tenant space is the perfect opportunity for expansion of the nonprofit center.

This addition allows Shared Spaces to expand to a nonprofit campus with MAF moving into a new Philanthropy Center next door. Because of the generosity of Tony and Rob and all of our donors, we plan to open our new doors in the Spring of 2020.

FINANCIALS AT A GLANCE

\$19,568
MILLION TOTAL ASSETS

85
TOTAL NUMBER OF
CHARITABLE FUNDS

\$980,031
TOTAL GRANTS AWARDED
IN 2019

388 GRANTS

WHO WE ARE

Since 1974, the Mankato Area Foundation has been dedicated to building a community of individuals that believe in the strength of giving. We continue today to shape Greater Mankato through connecting acts of giving with our community's needs.

Learn how you can start to make an impact today.

www.mankatoareafoundation.com

 MANKATO AREA FOUNDATION

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