

**Development Narrative Report
FY 2023 - 2024 – Thru January 2024**

GRANTS

- Hardenbergh Foundation awarded \$25,000 grant to support general operations.
- Submitted grant application to Richard M. Schulze Family Foundation for \$45,000 on 12/15/2023 to support member services and engagement. A site visit will take place in January/February. Grants will be awarded in May 2024.
- Athwin Foundation awarded a grant of \$2000 to support general operations.
- Pending LOI’s to several prospective funders for general operations support. See Grant Pipeline Report for specific details.
- Submitted a grant request to Donaldson Foundation for \$12,000 to support We Share Solar program participation at three metro schools.

TRUSTS

- Waiting for information on the 2024 Helen Harrington Charitable Trust annual distribution details. The annual distribution in 2023 was \$45,368.80 to support general operations with quarterly payments on 1/31, 4/30, 7/31 and 10/31.

ANNUAL FUND

Category	# of Donors	Total YTD Amount	# of New Donors
Individuals/Orgs/Corp	29	\$62,032.60	2
Trusts	0	0	0
Foundations	3	\$277,000.00	0
Sponsors	29	\$47,400.00	6

FY23/24 Individual/Organization/Corporation Donors (Does not include sponsors)

- Tim Benz
- Best Buy/Anastasia Benz
- Michael Lamb
- Heidi Gallus
- Wyayn Rasmussen
- Tim Barrett
- Tim Berner
- Michele and Marshall Skare
- Lisa and Chris Vosbeek
- David Leininger
- Dean and Cheri Broadhead
- William Lower
- Blake and Kris Nelson
- Michael Brennan
- Rosa Miller
- James W. Hansen
- Albin Dubiak
- Frels Family Foundation
- Douglas and Laura Jaeger

- Dr. Thomas D. Larson
- Roger D. and Mary E. Ahrenholz
- Sowles Co.
- Mark & Mary Davis Foundation
- Patrick O. and Mary K. Regan
- James D. and Patricia A. Heydon
- Jon and Lea Theobald
- Premier Banks
- Shana and Jeremy Duininck
- Andy and Anne Biebl

Board Giving

53% of board members have made a gift during FY23/24

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SPONSORSHIPS

2024 Education Awards (April 28, 2024)

Bethel University	\$1500
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Total YTD Sponsorship	\$1500
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2023 School Leadership Conference (Sept. 25 – 27, 2023)

Catapult Learning	\$5000
Thrivent	\$2500
Slow Road Photo	\$2500
Enquiry Tracker	\$2500
Northrisk Partners	\$2500
FACTS	\$2500
Canopy IT Solutions	\$2500
Cognia	\$2500
Solid Rock Construction	\$1500
Blackbaud	\$1500
Donald’s	\$1500
Escale Advisors	\$1500
Renaissance	\$1500
Langer Construction	\$1500
Lakeshore Learning	\$1500

Total YTD Sponsorship	\$33,000
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Declined Sponsorships at School Leadership Conference (Space)

- My School Educational Software
- Sperides Reiners Architects, Inc.
- Pope Design Group

- 360 Services - was interested in Premier sponsorship
- Fenworks
- Kinuu
- Revolution Sporting Goods
- JLG Architects

2023 STEM Education Conference (Aug 1, 2023)

• Next Wave STEM	\$500
• H2I Group	\$500
• Accelerate Learning/STEM Scopes	\$500
• MN Zoo	\$500
• Thrivent	\$500
• Science from Scientists	\$500
• Care Counseling	\$500
• MN Department of Transportation	\$500
• High Tech Kids	\$250
• createMpls	\$250
• SparkPoint Innovations	\$500

Total YTD Sponsorship **\$5000**

Other Organization Sponsorships 2023-2024

• Gradelink – ENEWS spotlight 7/2023 – 6/2024	\$1500
• Enquiry Tracker – ENEWS spotlight Aug, Sept. Oct	\$675
• Thrivent - ENEWS Banner Sponsor (12 issues, 1/23–12/23)	\$1200
• Thrivent – PD Webinar Sponsor (2 webinars)	\$1500
• Thrivent – Preferred Partnership	\$500
• 360 Security Services (ENews spotlight July, Nov. Dec, Jan. Feb - July)	\$2350

Total YTD Other Sponsorships **\$7725**

FY 2023/2024 DEVELOPMENT FUND REPORT (Thru January 2024)								
Grants		FY24 PLAN	FY24 YTD	FY 23 YTD	Donors	FY 24 YTD	FY 23 YTD	
	Unrestricted	\$108,500.00	\$277,000.00	\$125,000.00	\$10,000 +	2	1	
	STEM	\$140,000.00	\$0.00	\$0.00	\$5,000 - \$9,999	2	1	
		\$248,500.00	\$277,000.00	\$125,000.00	\$1,000 - \$4,999	8	6	
					\$1-999	17	17	
Honor Fund					TOTAL	29	25	
	Honor Fund/Unrestricted	\$75,000.00	\$62,032.60	\$35,102.53				
	HH Trust	\$45,000.00	\$0.00	\$45,368.80	Foundations	FY 24 YTD	FY 23 YTD	
		\$120,000.00	\$62,032.60	\$80,471.33	\$100,000 +	1	1	
					\$50,000 - \$99,999			
Sponsorships					\$25,000 - \$49,999	1	1	
	Awards	\$42,500.00	\$1,500.00	\$0.00	\$10,000 - \$24,999			
	SLC	\$25,000.00	\$33,000.00	\$22,500.00	\$1 - \$9,999	1		
	STEM	\$3,000.00	\$5,000.00	\$2,750.00	TOTAL	3	0	
	Seminars/Enews	\$5,500.00	\$7,725.00	\$6,950.00				
		\$76,000.00	\$47,225.00	\$32,200.00	Sponsors	FY 24 YTD	FY 23 YTD	
					\$5,000+	2	2	
TOTAL		\$444,500.00	\$386,257.60	\$237,671.33	\$2,500-\$4,999	8	3	
					\$1,000-\$2,499	8	7	
					\$1-\$999	11	8	
					TOTAL	29	20	
					Board Giving FY24 YTD			
					Total Members	Donors	Total FY24	%
					17	9	\$12,880.46	53%
					Board Giving FY23			
					Total Members	Donors	Total FY23	%
					18	13	\$11,734.59	72%
					Board Giving FY22			
					Total Members	Donors	Total FY22	%
					17	15	\$13,309.47	88%
					Board Giving FY21			
					Total Members	Donors	Total FY21	%
					19	15	\$15,043.61	79%

Grant Pipeline Report - FY 2023/2024 (July 1, 2023 - January 31, 2024)

Source	Purpose	Request	Budget	Status	YTD Awarded	Deadlines & Notes
Spell Family Foundation	Unrestricted - General Ops	\$5,000.00	\$0.00	Pending		Submitted 5/25/2023
WEM Foundation	Unrestricted - General Ops	\$250,000.00	\$ 25,000.00	Awarded	\$250,000.00	Foundations last gift
Hardenbergh Foundation	Unrestricted - General Ops	\$25,000.00	\$ 25,000.00	Awarded	\$25,000.00	
Richard Schulze Family Foundation	Unrestricted - General Ops	\$45,000.00	\$ 45,000.00	Pending		Grant application submitted 12/15/2023
	Six-Month Check-In Report - Spring 2023 Grant	na	na	Completed	na	Submitted 10/12/2023
	Final Report - Spring 2023 Grant	na	na	Completed	\$0.00	Deadline 4/26/2023
Athwin Foundation	Unrestricted - General Ops	\$5,000.00	\$0.00	Awarded	\$ 2,000.00	
GHR Foundation	Project/Program, General Operating Support, Sponsorships		\$0.00			Tim will contact program officer about grant invite
Schott Foundation	Restricted - STEM Program	\$55,000.00	\$ 50,000.00	In process		Application deadline 4/1/2024
Xcel Energy Foundation	Restricted - STEM Program	\$27,500.00	\$ 25,000.00	In process	na	Annual meeting on 1/9/2024, look for grant invite 3/1/2024 with 3/31/2024 deadline
	Final Impact Report	na	na			Deadline 7/31/2024
3M Foundation	Restricted - STEM Prog/underserved students (SciSci Programming)	\$50,000.00	\$ 50,000.00			By invite in Spring 2024, schedule annual STEM update in Feb. 2024
	Final Impact Report	na	na		na	Deadline 10/1/2024
HB Fuller	Restricted - STEM	\$10,000.00	\$ 5,000.00	In process		Application accepted 3/1/24 - 3/31/24
Donaldson Foundation	Restricted - STEM	\$12,000.00	\$0.00	Pending		Submitted 1/9/2024
Otto Bremer Trust	Unrestricted - Gen Op, program and capital support					Multiple deadlines - Feb. 8, April 4, June 6, and Aug. 1, 2024 - Tim will schedule a meeting with Frank Milev/Program Officer in Jan. 2024
				Total Awarded	\$277,000.00	
STEM Support Provided by Community Partners						
We Share Solar	Funding for Legacy Schools, 2 new member schools			Awarded	\$19,300.00	Funding provided to We Share Solar by WEM Foundation
Science from Scientist (SciSci)	Restricted - STEM Prog/underserved students SciSci Programming)			Awarded	\$17,500.00	Funding provided to Science from Scientists from Schulze Family Foundation
				Total Awarded	\$36,800.00	
Letters of Interest Submitted to Prospect Funders						
Albright Foundation	Robert Albright/President, Treasurer	\$5,000.00			Pending	
Bieber Family Foundation	William F. Bieber/President	\$5,000.00			Pending	
Chase Family Foundation	Andrew Chase/President	\$5,000.00			Pending	
Donald & Marie Roberts Charitable Foundation	Nicholas S. Roberts/Co-President	\$5,000.00			Pending	
Dougless Brandenburg Foundation	Jason Brandenburg/Executive Director	\$5,000.00			Pending	
Elizabeth C. Quinlan Foundation	Lucia Lahiff Crane/President, Treasurer	\$5,000.00			Pending	
Hegman Family Foundation	Jennifer Higgins/President	\$5,000.00			Pending	
Hertogs Family Education Foundation	Scott Hertogs/Director	\$5,000.00			Pending	
Oiga B. Hart Education Foundation	Robert J. Wasko/Trustee	\$5,000.00			Pending	
Slaggie Family Foundation	Vickie Trouten	\$5,000.00			Pending	Funding only to support catholic schools in Winona County
Summer Fund LOI	Harry G. McNeely, Jr./President	\$5,000.00			Pending	
Woodhouse Family Foundation	Kirt Woodhouse/President	\$5,000.00			Pending	
US Private Wealth Management	Scott Kaul - manages several small family foundations					Need introduction