

Development Narrative Report FY 2024 – 2025 (Final Year End Report)

GRANTS

Recent Grant Awards

- **Awarded** – \$37,000 grant from the Richard M. Schulze Family Foundation to support leadership development, program support, and member engagement. The original request was for \$45,000.
- **Awarded** - \$25,000 grant from Xcel Energy in support of the STEM Program.
- **Pledged** - \$25,000 grant from 3M in support of the STEM Program general operations. Grant payment is expected by the end of Sept.

Grant Submissions

- **Pending** – \$30,000 grant request to Boston Scientific to support the STEM Program at under-resourced metro schools during the 2025–2026 school year.
- **Pending** – \$10,000 grant request to the H.B. Fuller Foundation to support the Science from Scientists Program at under-resourced metro schools during the 2025–2026 school year.

Meetings and Funding Updates

- Lisa Vosbeek attended a Small Family Foundation training and is working on a prospect list to send letters of interest.

Potential Funding Opportunities

- Anne Dougherty, a member of the STEM Advisory Committee, introduced Sarah Aesoph from Horton, Inc. as a potential funder for the STEM program. We held an introductory meeting and shared a follow-up outlining our mission, programs, and community impact. We have followed up with Sarah and are currently awaiting her response.
- The Otto Bremer Trust no longer has a formal grant application process and instead relies on stakeholder engagement and internal research to award funding. Tim is working with the program officer to align our funding request with the foundation's strategic priorities.

TRUSTS

- The annual distribution amount from the Helen Harrington Charitable Trust will be \$42,867.92 for 2025.

ANNUAL FUND

Category	# of Donors	Total YTD Amount	# of New Donors
Individuals/Orgs/Corp	43	\$74,787.74	2
Trusts	1	\$42,867.92	0
Foundations	6	\$239,000.00	0
Sponsors	60	\$93,750.00	11
			% Giving
Board (17)	17	\$25,112.54	100%

FY24/25 Individual/Organization/Corporation Donors (Does not include sponsors)

1. Tim Benz
2. Best Buy/Anastasia Benz
3. Michael Lamb
4. Heidi Gallus
5. Mike Brennan
6. Chuck Spaeth Ford
7. Sowles Co
8. Frels Family Foundation
9. William Lower
10. Blake Nelson
11. Marshall and Michele Skare
12. Joel Landskroener
13. Tim Berner
14. Jennifer Cassidy
15. Doug and Laura Jaeger
16. Patrick O. and Mary K. Regan
17. Dr. Thomas D. Larson
18. Premier Banks
19. Andy and Anne Biebl
20. Frances Murnane
21. Mark and Mary Davis Foundation
22. James D. and Patricia A. Heydon
23. Shana and Jeremy Duininck
24. Mike Dickson
25. Teri and Kevin McCloughan
26. Dr. Thomas D. Larson
27. Mathiowetz Construction
28. NCCA Foodservice Solutions
29. Philip and Constance Paquette
30. Mary and Michael Partington
31. Chris and Lisa Vosbeek
32. William and Bonita Frels
33. Robert and Joan Cummins – **NEW**
34. Battenkill Foundation c/o Margaret and Edward Requet
35. Rosemary Schwartz – **NEW**
36. Dean and Cheri Broadhead
37. Jim Hansen
38. Rosa Miller
39. Chuck Spaeth Ford, Inc
40. John McCall
41. Randy and Rachel Kroll
42. Brian Lynch
43. Kate Wollan

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2025 Private and Independent Education Awards (April 27, 2025)

Rosa Miller	\$7500
Mairs and Power	\$3000
Premier Banks	\$3,000
Xcel Energy	\$3,000
Bethel University	\$1,500
Broadhead	\$1,500
McClung PR	\$1500
Linda & Ken Holmen	\$1,500
Jim Hansen	\$1,500
Ulteig	\$1,500
Catholic Schools of the Archdiocese of Saint Paul and Minneapolis	\$1,500
Phoenix School Counseling	\$1,500
Eight Moon	\$1,000
Hellmuth & Johnson	\$1,000
Redpath	\$1,000
Kelly Regan	\$1,000
Josh and Sue Killian	\$500
Chuck and Mary Kilian	\$500
Teri and Kevin McCloughan	\$500
Anna and Jason Lima	\$500
Leininger CPA	\$500
Park Street Public	\$500
Native3 (NEW)	\$500
Larkin Hoffman	\$500
Avail Academy	\$250
Andrew Hilliker	\$250
Saint Thomas Academy	\$500
Academy of Holy Angels	\$250

2025 Education Awards Sponsorship	\$38,250
2025 SPONSORSHIP GOAL	\$40,000

2024 School Leadership Conference (Sept. 30 – Oct. 2, 2024)

Catapult Learning	\$5000
Langer Construction	\$5000
Thrivent	\$3000
Enquiry Tracker	\$3000
FACTS	\$3000
Canopy IT Solutions	\$3000
Cognia	\$3000
Tools for Success – NEW	\$1500
North Risk Partners	\$1500
Solid Rock Construction	\$1500
Donald’s Uniform	\$1500
Escale Advisors	\$1500
Renaissance	\$1500
Lakeshore Learning	\$1500
Pope Design Group – NEW	\$1500
Revolution Sporting Goods – NEW	\$1500
Slow Road Photo	\$1500

2024 School Leadership Sponsorship	\$40,000
2024 SPONSORSHIP GOAL	\$30,000

Preferred Partnership Program

Thrivent	\$500
Langer Construction	\$500
Cognia	\$500
Enquiry Tracker	\$500
Slow Road Photo	\$500
Donald's Uniforms	\$500
Tools for Success	\$500
Renaissance	\$500
MNSAA	\$500

2024 Preferred Partnership Program Sponsorship	\$4500
2024 Sponsorship Goal (Not in budget, new sponsorship offering)	\$0

2024 STEM Education Conference (Aug 7, 2024)

- MN Zoo \$250
- Thrivent \$500
- Science from Scientists \$500
- Care Counseling \$500
- Groves Learning Organization \$500
- High Tech Kids \$500
- createMpls \$250
- Sadlier Publishing \$500
- SmartLab - **NEW** \$500
- Teq - **NEW** \$500
- Fenworks - **NEW** \$500
- Minnesota Agriculture in the Classroom - **NEW** \$250

2024 STEM Education Conference Sponsorship	\$5000
2024 SPONSORSHIP GOAL	\$4000

Other Organization Sponsorships 2024-2025

- VentureEd Solutions (1 issue Editor's Choice October 2024) **NEW** \$300
- Thrivent - ENEWS Banner Sponsor (6 issues, 7/23 - 12/23) \$600
- Thrivent - PD Webinar Sponsor (2 webinars) \$1500
- Thrivent - ENEWS Spotlight Sponsor (6 issues Jan - June 2025) \$1200
- Opus Design Group - ENEWS Spotlight Sponsor (7 issues Jan-June 2025) **NEW** \$1400
- The Earliest Edge - PD Session Sponsor (May 1, 2025) **NEW** \$1000

YTD Other Sponsorships	\$6000
2024/2025 Other Sponsorship Goal	\$5500

FY 2024/2025 DEVELOPMENT FUND REPORT (Final Year End Report)								
Grants		FY25 PLAN	FY25 YTD	FY 24 YTD	Donors	FY 25 YTD	FY 24 YTD	
	Unrestricted	\$70,000.00	\$64,000.00	\$307,000.00	\$10,000 +	3	3	
	STEM	\$125,000.00	\$175,000.00	\$125,000.00	\$5,000 - \$9,999	1	1	
		\$195,000.00	\$239,000.00	\$432,000.00	\$1,000 - \$4,999	16	13	
					\$1-999	23	29	
Honor Fund					TOTAL	43	46	
	Honor Fund/Unrestricted	\$80,000.00	\$74,787.74	\$77,180.00				
	HH Trust	\$45,000.00	\$42,867.92	\$44,809.12	Foundations	FY 25 YTD	FY 24 YTD	
		\$125,000.00	\$117,655.66	\$121,989.12	\$100,000 +	1	2	
					\$50,000 - \$99,999	1		
Sponsorships					\$25,000 - \$49,999	3	3	
	Awards	\$40,000.00	\$38,250.00	\$38,250.00	\$10,000 - \$24,999			
	SLC	\$30,000.00	\$44,500.00	\$33,000.00	\$1 - \$9,999	1	1	
	STEM	\$4,000.00	\$5,000.00	\$5,000.00	TOTAL	6	6	
	Seminars/Enews	\$5,500.00	\$6,000.00	\$7,725.00				
		\$79,500.00	\$93,750.00	\$83,975.00	Sponsors	FY 25 YTD	FY 24 YTD	
					\$5,000+	4	3	
TOTAL		\$399,500.00	\$450,405.66	\$637,964.12	\$2,500-\$4,999	7	9	
					\$1,000-\$2,499	26	22	
					\$1-\$999	23	23	
					TOTAL	60	57	
					Board Giving FY25			
					Total Members	Donors	Total FY24	%
					17	17	\$25,112.54	100%
					Board Giving FY24			
					Total Members	Donors	Total FY24	%
					17	17	\$22,194.75	100%
					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%

Grant Pipeline Report - FY 2024/2025 Year End Report						
Source	Purpose	Request	Budget	Status	YTD Awarded	Deadlines & Notes
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	\$ 30,000.00	Awarded	\$37,000.00	
Athwin Foundation	Unrestricted - General Ops	\$5,000.00	\$2,000.00	Awarded	\$2,000	
Schott Foundation	Restricted - STEM Program	\$100,000.00	\$ 100,000.00	Awarded	\$100,000.00	
Xcel Energy Foundation	Restricted - STEM Program	\$27,500.00	\$ 25,000.00	Awarded	\$25,000.00	
3M Foundation	Restricted - STEM Prog/underserved students (SciSci Programming)	\$50,000.00	\$50,000.00	Awarded	\$50,000.00	2024 funding was awarded late and allocated to 2025. Annual meeting scheduled for 2/7 for update on funding status.
Boston Scientific	Support STEM K-12 educational program for low income students	\$30,000.00	\$0.00	Pending		
H.B. Fuller Foundation	Support for Science from Scientist Program at under-resourced metro schools	\$10,000.00		Declined		
Otto Bremer Trust	Strategic initiatives that align with OBT objectives - no grant applications accepted. Grants awarded based on stakeholder engagement and research by OBT.	TBD	\$0.00	In Process		Tim will schedule follow-up meeting to discuss strategic areas and which ones are the best fit for funding to fit in their new strategic priorities
Horton, Inc	Support the surrounding community in a variety of ways. They have a vested interest in STEM. Could also be a sponsorship prospect	TBD	\$0.00	In Process		Met with and sent outline of our mission and programs to Sarah Aesoph, CFO/CIO, sarah.aesoph@hortonww.com. Waiting for her response.
GHR Foundation	Restricted - Programming (no grant deadlines published)		\$0.00	In review		Tim will contact new program officer to see if we fit in funding priorities
Total Awarded YTD					\$239,000.00	
Other Funding						
We Share Solar (WSS)	WSS supplemental funding for Legacy Schools (9 schools served by WSS Program)			Awarded	\$16,400.00	Funding provided by WSS for MINNDEPENDENT member schools
Science from Scientist (SciSci)	SciSci supplemental funding to serve metro schools will high percentage of students of color (10 schools served by program)			Awarded	\$17,000.00	Funding provided by SciSci for MINNDEPENDENT member schools
Total Awarded					\$33,400.00	