

Celebrating
the Foundation's

30th

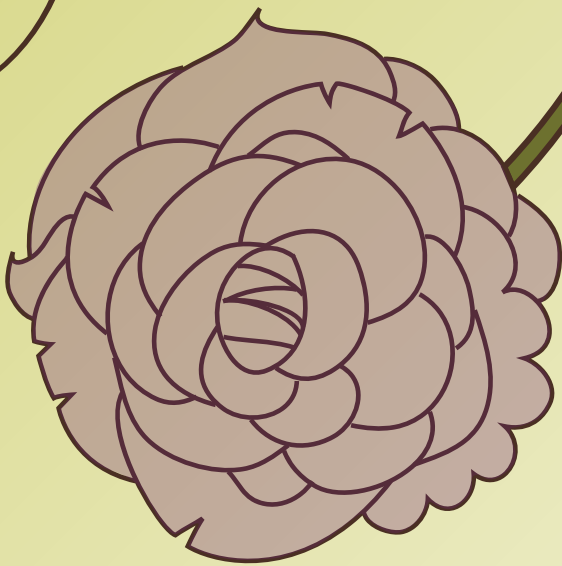
Anniversary



The Sheltering Arms Foundation



2013-2014 Annual Report



Our Mission

The Sheltering Arms Foundation invests in the lives of Minnesota’s children to help them reach their full potential. We fund non-profit organizations and support policies that benefit children and their families who have the least access to resources.

Our History

Sheltering Arms, founded in 1882 by Deaconess Annette Relf, is governed by a Board of Trustees composed of women members of the Episcopal Church of Minnesota. In response to the changing needs of children, Sheltering Arms successively operated an orphanage, a hospital for children with polio and a day school for special needs children. In 1983, Sheltering Arms was reincorporated as The Sheltering Arms Foundation. Consistent with the beliefs of the founders, the Foundation continues to be committed to the well being of children.

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The Sheltering Arms Foundation

1730 Clifton Place, Suite 100 • Minneapolis, MN 55403

612~871~9210 • 1~866~871~9210 • Fax 612~871~0041

www.sheltering-arms.org

Leadership Letter

Dear Friends,

Sheltering Arms began its 2013-2014 year with a retreat focused on diversity and equity and carried that focus through the year. Minnesota has one of the largest achievement gaps in the country between children of color and their white peers. Eliminating that gap is a key goal of Sheltering Arm's most recent strategic plan. The plan commits Sheltering Arms to do this through funding and policy strategies to ensure that all Minnesota children meet social, emotional, cognitive and physical milestones to be ready for kindergarten and then prepared for seventh grade. We are increasingly looking to align our strategies with our collective impact partners such as the Start Early Funders and Ignite Afterschool to see the greatest possible impact of our work.

It's great to be able to look back over the last year and see the exciting results of the efforts that we have been involved with to help Minnesota children and families. Thanks go to our grantees, trustees, donors and partners in non-profits, funder coalitions, education, government and within the Episcopal Church.

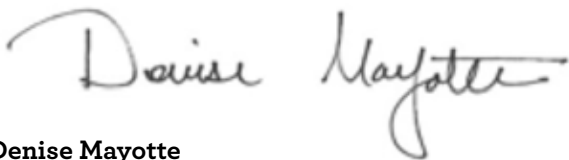
This past year, our efforts included:

- \$450,000 in grants to 38 organizations as well four grants to support work on behalf of children and families at Episcopal congregations.
- A successful launch of our new on-line grantmaking capability
- Our first Sheltering Arms Sunday on August 6, celebrated in numerous Episcopal communities around the state
- A celebration of the 30th anniversary of the foundation and the 130th anniversary of the founding of Sheltering Arms organization
- A gathering of grantees and trustees to share stories of success
- A Children and Youth Issues Convening in partnership with the Start Early Funders Coalition, the MN Council of Non-Profits and the MN Council on Foundations that attracted over 1,000 participants
- Work on behalf of children through the Governor's Early Learning Council, The Start Early Funders, Minnesota Youth Funders Network, Ignite Afterschool and more

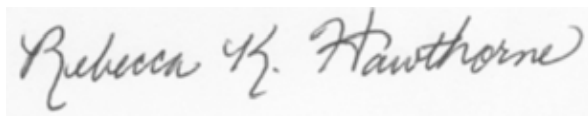
2013-2014 saw continued legislative victories for young children in Minnesota. Through our work as a part of the Start Early Funders Coalition, we participated in the efforts that secured an added \$4.6 million for scholarships to high quality care and education for low-income 3 and 4 year olds and their younger siblings. These new scholarships make additional opportunities available to children but at best, this funding can serve only 10% of the eligible children. We will be looking towards the next few sessions to make sure all Minnesota children have the opportunity to start kindergarten ready and prepared for success in school and life!

We thank you for your continuing involvement with the Sheltering Arms Foundation on behalf of our children and our future.

Sincerely,



Denise Mayotte
Executive Director



Rebecca Hawthorne
Board President, 2013-14

Early Childhood Education & Care

Children's Theatre Company

Program Title: *Early Childhood Initiative*

Location: Minneapolis

Amount Granted: \$15,000

Children's Theatre Company is the largest theater for young audiences in North America and one of the largest professional theaters in the Twin Cities. Sheltering Arms supported its Early Childhood Initiative that brings high quality theater arts based learning experiences based on best practices in early education to early learners ages two to six from low-income families in the Twin Cities. The program provides learning opportunities for the children's caregivers as well, with professional development opportunities for early childhood teachers and opportunities for low-income parents to engage in play-based learning with their young children.

Children's Theatre Company has worked closely with a researcher from the U of M's Center for Early Education and Development both to develop the programming and to evaluate outcomes of this program and all CTC early childhood programs. The evaluation especially emphasizes social-emotional indicators or "developing the muscle of empathy". Partners for the program included twelve early childhood programs such as La Crèche Early Childhood Center, Greater Minneapolis, Crisis Nursery, Head Start programs in both Minneapolis and St. Paul and numerous school based programs.



"Children's Theatre Company believes strongly that the arts have a critical role to play in supporting high-quality early education in our community. The Early Childhood Initiative—which includes plays for early learners, residencies in the community, and professional development for early education professionals—brings theatre arts-based learning opportunities linked to best practices in early education to thousands of young children each year."

Peter Brosius
Artistic Director



Center City Housing Corp.

Tots of Tomorrow
Duluth • \$15,000

Centro, Inc.

Siembra Montessori Preschool
Minneapolis • \$10,000

Child Care Aware of Minnesota

Parent Aware
Statewide • \$20,000

The Children's Theatre Company

Early Bridges
Minneapolis & St. Paul
\$15,000

Interfaith Outreach & Community Partners

Caring for Kids Initiative
Plymouth • \$15,000

Joyce Preschool

Home Visiting Program
Minneapolis • \$10,000

Montessori Training Center of Minnesota

Parent Education Initiative
St. Paul • \$12,000

Neighborhood House

Skills for School
St. Paul • \$15,000

PACT for Families Collaborative

The Incredible Years
West Central Minnesota
\$17,000

Prevent Child Abuse Minnesota

Communities of Color Initiative
Statewide • \$15,000

Project FINE

Learning Together Program
Winona and St. Charles
\$15,000

St. Anne's Place

Early Childhood Program
Minneapolis • \$10,000

St. Stephen's Human Services, Inc.

The Incredible Years
Minneapolis • \$13,000

West Central Initiative

Parent Aware
West Central Minnesota
\$10,000

YWCA of Duluth

Spirit Valley
Circles of Security
Duluth • \$15,000

YWCA of Minneapolis

Early Childhood Advocacy
Minneapolis • \$15,000

Youth Development

Northland Foundation

Program Title: *Age to age: Reading Pals Pilot Program*
 Location: Duluth
 Amount Granted: \$15,000

The Northland Foundation is the Minnesota Initiative Foundation that serves the northeast corner of the state. It has run the very successful youth collaborative KIDS PLUS which has initiated youth programming in many towns in the region. Under the auspices of an Atlantic Philanthropies grant, it has been implementing a program called AGE to age, a grassroots intergenerational initiative aimed at enhancing at risk children's educational and social skills development.

Sheltering Arms supported a program within the AGE to age Program called the Reading Pals Pilot Project in three KIDS PLUS communities: McGregor, Proctor and Moose Lake. All of these communities have a very high proportion of low-income youth. Older adults in the AGE to age program work to develop literacy skills with children ages three years through third grade level.

This project is helping children to become successful readers, and to develop relationships with caring adults. This kind of community involvement is essential to the social and academic success of young children. The project uses the energy and skills of adults over 55 to benefit youth and is a model of how communities can mobilize this resource.



“Each of the three AGE to age communities has leveraged year-two funding to further build the impact of their Reading Pals programs,” stated Lynn Haglin, the Northland Foundation Vice President/KIDS PLUS Director. **“And they report that the older adult volunteers seem to have a special knack for establishing trusted, caring relationships with the children that nurtures their enthusiasm for reading and learning.”**



American Oromo Community in Minnesota
American Champions League
 St. Paul • \$10,000

Emerge Community Development
Link Program
 Minneapolis • \$10,000

Keystone Community Services
Hmong Youth Program
 St. Paul • \$12,000

Kinship Partners, Inc.
Community Mentoring Outreach
 Brainerd • \$10,000

Northfield Healthy Community Initiative
PRIMEtime Collaborative
 Northfield • \$10,000

Northland Foundation
AGE to Age: Reading Pals
 McGregor, Moose Lake and Proctor • \$15,000

Patchwork Quilt
Summer & Afterschool Program
 Minneapolis • \$15,000

Project Get Outdoors
Community Mapping & Outreach Program
 Statewide • \$10,000

Sabathani Community Center, Inc.
Horizons Youth STEM Program
 Minneapolis • \$12,000

So How Are The Children?
Summer Youth Program
 Faribault • \$14,000

St. Paul Area Council of Churches
Freedom School
 St. Paul • \$10,000

Urban Strategies, Inc.
Chefs in Motion
 Minneapolis • \$10,000

Way to Grow
Great by 8 Campaign
 Minneapolis • \$10,000

YMCA of the Greater Twin Cities
School Success Beacons Program
 Minneapolis • \$10,000

Youth Farm & Market Project
Family Engagement Program
 Minneapolis • \$10,000

Family Support

Appetite for Change

Program Title: *Fresh Start Garden Program*

Location: Minneapolis

Amount Granted: \$15,000

Appetite for Change's Fresh Start Garden program was a pilot project that brought a broad group of partners together for this innovative early childhood program in north Minneapolis. Fresh Start Garden builds community and serves preschoolers through a gardening and cooking program that used community based participatory research led by the U of M to document its results.

Appetite For Change (AFC) partnered with LaCreche Early Childhood Center, a 4-star Parent Aware rated center. The young children were mentored by youth ages 14-18 from the WE WIN Institute who work with the children and serve as role models. La Creche, WE WIN and a youth advisory board gave input into a curriculum co-developed by AFC and the Landscape Arboretum to make sure that it is culturally relevant. Staff at all of the project's partners received training in this method of evaluation in order to continue to use it after the pilot year.



“Community Cooks, and specifically the Fresh Start Garden Project is an innovative and effective community-based, popular-education model for engaging families and building capacity to grow, cook, eat and connect with one another around food.”

Michelle Horowitz
Executive Director

Appetite for Change

Fresh Start Garden Program
Minneapolis • \$15,000

Family Housing Fund

Visible Child Initiative
Statewide • \$20,000

Northside Achievement Zone

Family Academy
Minneapolis • \$10,000

Resource, Inc.

Building Resilient Families Program
Minneapolis • \$10,000

Village of Hope

PEACH Program
Bemidji • \$10,000

Profile of an Advocacy Grant

Start Early Funders Coalition

Program Title: *MinneMinds Campaign*

Location: Statewide

Amount Granted: \$20,000

The MinneMinds Coalition representing parents, providers, leading philanthropic organizations, businesses and local chapters of national non-profits continues to advocate for the investments needed to finally close Minnesota's achievement gap, which is still one of the largest in the country. We must remain focused on creating the world's best workforce and continue to invest in Minnesota.

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**Frank Forsberg,
MinneMinds Chair**



Frank Forsberg and Denise Mayotte, Start Early co-chairs, at the Children and Youth Issues Briefing which served as a launch for last year's MinneMinds campaign.



A child at Joyce Preschool, a high quality bilingual child care center that received numerous early childhood scholarships this year.



Advocacy Work at the Sheltering Arms Foundation Helping Minnesota's Children Reach their Full Potential

The Sheltering Arms Foundation has chosen to focus on advocacy for children's issues as an important addition to our direct service grantmaking. Some of that work is done through grants to non-profits doing advocacy work. It is also done through partnerships with organizations both locally and nationally, outreach to Episcopal congregations about children's policy issues and by providing training opportunities to our grantees and other non-profits serving children to advocate for themselves.

Our advocacy is focused on early childhood and out-of-school-time issues as a strategy to help eliminate the opportunity gap for Minnesota's most vulnerable children and to ensure that they have the chance to reach their full potential.

Episcopal Parish Grants

Church of the Epiphany

Project: *Giving Garden*

Location: Plymouth

Amount Granted: \$1,000

Sheltering Arms supported the Church of the Epiphany in Plymouth to engage the church's youth in a garden to provide vegetable to the NEAR food shelf. NEAR serves 1,200 low-income individuals each month from Robbinsdale, Crystal and New Hope. Of that number, over half are children. NEAR's clients often go without fresh produce because of the high price. In summer, children are particularly likely to be deprived of fresh produce because they are not in school and are missing the nutritious free lunch they receive during the school year.



"I delivered 23 pounds of fresh beets, cucumbers, radishes, peas and beans to NEAR this am. When I arrived with my dewy, just-picked veggies, a dejected staff person was pulled rotted leaves off a pile of donated lettuce, looking for those that could be salvaged for clients to eat. It was a stark contrast between nourishing, mouthwatering veggies just twenty minutes from the ground and a pile of rotting greens just minutes from the dumpster. Thank you to all of Epiphany for your generosity and kindness in starting the garden and thank you to all the gardeners who make time in their busy lives to make our garden grow!"

Giving Garden Volunteer



**Cathedral Church of our
Merciful Saviour**
Community Cathedral Café
Faribault • \$1,000

Church of the Epiphany
Giving Garden
Plymouth • \$1,000

Holy Apostles
Summer Stretch Program
St. Paul • \$1,000

Messiah
Great Adventure Days
St. Paul • \$1,000

St. Mary's Episcopal Church
Galtier Tutoring Program
St. Paul • \$1,000

130 Years of Service to Minnesota's Most Vulnerable Children

Celebrating
the Foundation's

30th Anniversary

Sheltering Arms celebrated its 30th anniversary as a foundation and 130th anniversary as an organization this past year. To mark this occasion, the foundation held its first ever Sheltering Arms Sunday in collaboration with the Episcopal Community in Minnesota's 2014 mission of Engaging all Children. Numerous parishes around the state set aside time on Sunday, April 6 to hear the story of The Sheltering Arms Foundation and ongoing issues facing vulnerable children in Minnesota.

Sheltering Arms also held a birthday party at St. Mark's Cathedral that brought together grantees, policy partners, trustees, former trustees, staff and representatives of the Episcopal community. Bishop Prior commended Sheltering Arms on its many years of good work, this year's legislative successes were celebrated and glasses were raised to the many years that Episcopal women have created opportunities for Minnesota's children.



Donors

\$1,000+

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through the J. Peter Brull Fund
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Denise Mayotte and
Warren Hanson
Richard and Joyce McFarland
Minneapolis Orthopedics
Maria Mitchell
Nicholas Nerland
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Anna Ostenso
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Judy Parr
James and Joanne Pfau
Tina Pfau Gonzales and
Victor Gonzalez
Kathy Pluhar
Douglas and Diane Ramsey
Jenni and Ed Ryan
Elizabeth Shipton
Eleni Skevas

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Barbara Swan
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Jill Thompson
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Pat Vauk
Joyce Walker
Dan and Jane White
Frances and Frank Wilkinson
John Williams
Margaret Wirth-Johnson
Sandy Wittmann
Su-Fei Wong McKhann
Nancy Zwickey

\$0 - 99

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Lindsey and Mike Strand
Mary Tingerthal
Mary Tomback
Brad and Beth Tracy
Mary Turner
Kristen Vessey
Dawn and Tom Wanous
Judy and Jim Zimmerman

With the generous support of these individuals and corporations, The Sheltering Arms Foundation is able to make a difference in the lives of children and families in the state of Minnesota. All gifts, regardless of size, are important to The Sheltering Arms Foundation and its future. We make every effort to ensure that each donor is properly recognized. Please let us know of any omission or corrections.

Sister Annette Relf SAF Sustainers' Circle

Sister Annette Relf founded Sheltering Arms in the late 1800's, and the Foundation we have today is her legacy. We have named our sustaining membership in her honor. You can become part of the Sustainers' Circle simply by making a monthly donation of any amount. This is now your legacy, too. **A special thank you to our Sustainers' Circle members for your support!**

Laura Bathke
Tom and Catherine Beringer
Renee Champion
Greg and Janice Dames
John and Marcia Diracles
Bev Dumas
Judith Goff
Christabel and James Grant
Diane Grossman and Dean Topliff
Julia Gutz Moller
Robert Harvey
Jennifer Haskin McCafferty
Rebecca and Peter Hawthorne
Margo Herman
Carla Johnson
Irene and Jon Joseph
Kay Kramer and Sally Johnson
Katherine Lewis
Anna Love-Mickelson
Stephanie Malcy
Barbara Mayotte
Denise Mayotte and Warren Hanson
Edie Meissner
Lynne Morishita and Tom Amatruda
Tina Pfau Gonzales and Victor Gonzales
James and Joanne Pfau
Fiona and Ravi Pradhan
Lindsey and Mike Strand
Barbara Swan
Jill Thompson
Su-Fei Wong McKhann

Thank you to our Episcopal Community Partners!

Calvary Episcopal Church, Rochester
Christ Episcopal Church, Grand Rapids
Church of the Epiphany, Plymouth
Church of the Holy Communion, St. Peter
St. John's Episcopal Church Outreach
Committee, Mankato
St. Luke's Episcopal Church, Rochester
St. Peter's Episcopal Church, Kasson

In Honor of

Judith Goff
by Nancy Haworth Dingel

Martha Grave
by Dan and Diane Dodge

Amy Crawford and Alice Johnson
by Diane Grossman and Dean Topliff

Cara and David Holmberg
by Mary Jo Gould

Sandy Wittmann
by Jean Albrightson



In Memory of

Kathryn Gutz
by John and Linda Hopkins

Mary Hampton
by Nell Hillsley

Lisa Holmberg
*by Susan Dingle
by Diane Grossman and Dean Topliff
by Lynne Morishita and Thomas Amatruda*

John Killen
*by Christabel and James Grant
by Elaine Killen*

Juanita Palmerhall
by Joyce Walker

Margaret Parke
by Cindy Beukema

In Memory of Margaret "Marnie" Lind



Marnie was one of the visionary women who led the transition of Sheltering Arms School into a foundation over 30 years ago. She remained connected to our work over the many years and her passion for the children of Minnesota will not be forgotten. We thank those who knew and loved her for their support of Sheltering Arms' work and mission through their contributions in her memory. She will be greatly missed.

David and Marilyn Anderson
Charles and Alice Berquist
Dr. William and Dorothy Bevis
Bruce Birch and Susan Halse
Robert and Susan Blakely
Frances Bly
David and Elaine Borsheim
Cindy Beukema
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Margy Schaller
Cheryl Schindeldecker
Jackie Sullivan
Brad and Beth Tracy
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Tom and Dawn Wanous

Financials

Statement of Financial Position

	<i>Year ended June 30,</i>	
	<u>2014</u>	<u>2013</u>
Assets		
Cash and Cash Equivalents	\$ 355,358	\$ 322,948
Investments	15,062,951	13,807,196
Beneficial Interest in Perpetual Trusts	1,843,586	1,720,665
Interest and Dividends Receivable	-	-
Prepaid Expenses	2,841	2,518
Furniture, Equipment and Leasehold Improvements, Net of Accumulated Depreciation	24,067	29,856
Total Assets	<u>\$ 17,288,803</u>	<u>\$ 15,883,183</u>
Liabilities and Net Assets		
Current		
Unpaid Grant Commitments	\$ 454,000	\$ 470,075
Accounts Payable and Accrued Liabilities	-	-
Total Current Liabilities	<u>\$ 454,000</u>	<u>\$ 470,075</u>
Net Assets		
Unrestricted	\$ 14,991,217	\$ 13,692,443
Permanently Restricted	<u>1,843,586</u>	<u>1,720,665</u>
Total Net Assets	<u>\$ 16,834,803</u>	<u>\$ 15,413,108</u>
Total Liabilities and Net Assets	<u>\$ 17,288,803</u>	<u>\$ 15,883,183</u>

Complete audited financial statements are available upon request from the Foundation office. Audit performed by Wilkerson Associates.

Statement of Activities

	<i>Year ended June 30,</i>	
	<u>2014</u>	<u>2013</u>
Unrestricted Net Assets		
Revenue and Support		
Investments Income	\$ 228,395	\$ 253,066
Net Realized and Unrealized Gains on Investments	1,917,195	1,415,254
Contributions and Other Income	<u>42,900</u>	<u>27,040</u>
Total Revenue	<u>\$ 2,188,490</u>	<u>\$ 1,695,360</u>
Expenses		
Grants Awarded, Net of Refunds and Revisions	\$ 474,000	\$ 483,075
Operational Expenses:		
Advocacy and Grants Management	195,844	175,170
Management and General	145,460	135,524
Fund Development	6,156	10,861
Investment and Custodial Fees	<u>68,256</u>	<u>67,599</u>
Total Expenses	<u>\$ 889,716</u>	<u>\$ 872,229</u>
Net Change in Unrestricted Net Assets	<u>\$ 1,298,774</u>	<u>\$ 823,131</u>
Permanently Restricted Net Assets		
Revenue		
Gain on Beneficial Interest in Perpetual Trusts	<u>\$ 122,921</u>	<u>\$ 26,651</u>
Net Change in Permanently Restricted Net Assets	<u>\$ 122,921</u>	<u>\$ 26,651</u>
Change in Net Assets	<u>\$ 1,421,695</u>	<u>\$ 849,782</u>

The Foundation uses the accrual method of accounting for financial reporting purposes. Under the accrual method, revenues are recorded when earned, contributions are recorded when an unconditional promise to give has been received, and expenses are recorded when incurred. Grants are recorded when approved by the Foundation's Board of Trustees. Grant awards that extend more than one year into the future are not recorded due to their conditional nature as the grantee needs to meet certain requirements before subsequent year awards are approved for payment.