



## 2010 Contributors Report

we **believe** we can all make a difference,  
right here, right now



AMHERST H.  
**WILDER**  
FOUNDATION

ESTABLISHED 1906

**Here for good.**

# Amherst H. Wilder Foundation

## Making a difference, right here, right now.

July 1, 2009–June 30, 2010

The generosity of individuals and organizations that care deeply about the most vulnerable in our community sustains and enhances the Wilder Foundation's impact. In the pages that follow, we acknowledge these donors and their depth of commitment.

### HERITAGE PARTNERS Planned Giving Report 2009–2010

Heritage Partners, through their gifts to Wilder's endowment, work to sustain the Wilder vision to enrich the Saint Paul community and improve the lives of its most vulnerable citizens.

They express their deep commitment by making a gift through their wills, life income arrangements, beneficiary designations, and other estate plans that benefit the Amherst H. Wilder Foundation. We gratefully acknowledge our Heritage Partners for their lasting support.

The Amherst H. Wilder family established the Wilder Foundation Endowment Fund through a bequest of \$2.6 million more than 104 years ago. At the end of fiscal year 2010, the endowment principal was \$183,382 million. Sound investment policies are responsible for the substantial growth of the original bequest. Heritage Partners add their own generous planned gifts to the original endowment to help Wilder impact even more lives of Saint Paul residents in need today and for generations to come.

The investment committee of the Wilder Board of Directors oversees endowment funds, establishes overall investment strategy, sets allocation targets, and hires and evaluates professional management. Wilder invests funds with the goal of preserving and increasing principal, while supporting programs from a portion of the earnings.

#### Investment Committee Members

James P. Steiner, chair –  
Managing Principal/CEO  
Lowry Hill  
Stan K. Dardis – CEO (retired),  
Bremer Financial  
Corporation (through April  
22, 2010)

Elizabeth M. (Sandy) Kiernat –  
Community Volunteer  
Malcolm W. McDonald – Space  
Center Executive (retired)  
Xoua Thao, MD – Thao  
Medical Center

#### Heritage Partners in Memoriam

Louise Albrecht  
December 31, 1915 –  
August 1, 2010  
Edgar W. Blanch  
May 24, 1911 –  
January 22, 2004  
Elizabeth Bogared  
November 23, 1900 –  
November 13, 1997  
Hildegard H. Conkling  
October 26, 1901 –  
March 18, 1996  
Robert A. Crowe  
January 12, 1916 –  
March 25, 1996  
Dottie Dietz  
April 7, 1930 –  
December 11, 2008  
Lorraine M. Ellingson  
October 30, 1904 –  
September 12, 2001  
Arthur R. Emmerich  
June 12, 1909 –  
January 10, 1995  
Irma Gilbert  
October 21, 1918 –  
September 6, 2010  
William Gilbert  
October 14, 1908 –  
October 13, 2007  
John Hauschild  
June 2, 1935 –  
February 4, 1998  
Mary Heiserman  
July 12, 1942 – April 8, 2010  
Herman Hertog  
September 12, 1930 –  
September 1, 2006  
Catherine J. Hill  
October 1, 1915 –  
November 9, 2008  
John Lindsay Hill  
December 14, 1909 –  
August 30, 2009  
Martha E. Hoover  
October 31, 1909 –  
February 13, 2006  
Irving J. Jerry  
March 5, 1905 – April 12, 1995

Mary D. Jerry  
October 24, 1909 –  
August 22, 2007  
David B. Kachel  
May 13, 1931 –  
September 20, 2004  
Laurence J. Kress  
December 8, 1923 –  
October 14, 2010  
Francis LaBelle  
January 27, 1910 –  
August 6, 2001  
Martha A. Larson  
June 21, 1908 – June 15, 1996  
Alice Leach  
September 21, 1911 –  
October 19, 1998  
Roger Lenzmeier  
April 28, 1928 – April 3, 2000  
George Mairs  
June 15, 1928 – May 28, 2010  
Irene Maistrovich  
July 22, 1917 –  
December 30, 2008  
L. Frank Maistrovich  
November 13, 1916 –  
October 5, 2007  
Charles Naumann McCloud, M.D.  
May 20, 1912 –  
December 10, 1998  
Dorothy Merrill  
November 2, 1916 –  
November 17, 2009  
Roberta A. Mundschenk  
January 30, 1944 –  
May 26, 2007  
Eleanor Nyberg  
April 24, 1918 –  
February 3, 2004  
Walter T. Nyberg  
May 31, 1919 –  
February 27, 2007  
George C. Power, Jr.  
March 31, 1914 –  
July 18, 1995  
Norman M. Rose  
May 6, 1920 – August 4, 2007  
Leonard H. Tesmer  
August 27, 1924 –  
December 7, 2000  
Robert H. Tucker  
April 3, 1911 – August 1, 1998  
Lucille O. Werner  
October 20, 1913 –  
August 16, 2004  
Paul Werner  
August 3, 1913 – June 4, 2010  
Winnie Wickworth  
June 5, 1929 – February 1, 2001

Jean Wilkening  
October 1, 1926 –  
November 23, 1996  
Reta Youngman  
September 20, 1934 –  
May 21, 2008

#### Heritage Partners

Anonymous  
Richard and Wyona Bartch  
Brenda Becker  
John and Anne Bendt  
William J. Benzick  
Margaret M. Betts  
Charles R. Betts  
Craig and Kathy Binger  
Jean H. Blanch  
Tisha Bolger  
Ken and Abby Dawkins  
Charlton Dietz  
Elisabeth Doermann  
Drs. Phillip and Sandra  
Edwardson  
Judith Gavin  
Bob and Elaine Golberg  
Nancy Hauschild  
John and Violet Hertog  
Adrian and Nancy Hertog  
Katharina Hertog  
Bernice Jessen  
Rod and Lil Johnson  
Nancy Kachel  
Elizabeth and Bruce Kiernat  
Tom and Mary Kingston  
Verona LaBelle  
John and Nancy Lambros  
Dusty Mairs  
Philip C. Manz  
Paul and Tara Mattessich  
David and Mary Monson  
John and Renee Nagel  
Constance S. Otis  
Gregory and Phyllis Owen  
George and Diane Power  
Ken and Nina Rothchild  
Barbara and Phil Roy  
David and Cecilia Simpson  
Jean Teigland and Russ Felkey  
Rolf Thompson and CJ  
Jacobson  
Paul and Carolyn Verret  
Richard and Florence Wickworth  
Robert R. Wilke  
Robert and Kathy Yaeger  
Marcia and Jerry Yanz  
Richard and Janine Zehring



## AMHERST H. WILDER GENERAL ENDOWMENT

The Wilder Foundation began shortly after the turn of the century through the wills of Amherst Holcomb Wilder, his wife, Fanny Spencer Wilder, and their daughter, Cornelia Day Wilder Appleby.

Amherst Wilder came to Saint Paul in 1859 from his home in New York, and over time accumulated a fortune in the development of the Northwest. A bold and versatile entrepreneur, Wilder's many interests included trading, freight and stagecoach transportation, government contracting, lumbering, banking and insurance, real estate and railroading.

As Wilder grew older, his concern about what would become of his fortune if all members of his family died in a common accident, or if his daughter were to die childless, led him to draft a will. The will directed, upon his death, one-third of his estate to pass to Fanny, one-third to Cornelia Day, and one-third to grandchildren. If there were no grandchildren, one-third to aid the poor people in Saint Paul.

Amherst died in 1894 at the age of 66. A few years after Wilder's death, Cornelia Day married but had no children. In 1903, she died of pneumonia following a routine surgery. Fanny died three months later, despondent. The Wilder family's estate created a charity to "aid and assist the worthy poor, sick, aged, and otherwise needy persons of Saint Paul...and without regard to, or discrimination for, any such persons by reason of their nationality, sex, color, or religious scruples or prejudices."

This far-sighted and far-reaching purpose has remained the basic mission of the Foundation throughout its history. In 1974, the service area of the Foundation expanded to include the greater Saint Paul metropolitan area. Wilder's heritage and forward-thinking, inclusive vision continues to resonate with a growing number of partners and donors.

## BOARD-DESIGNATED ENDOWMENT FUNDS

Eight Board-designated endowment accounts, in addition to the Wilder family trust, provide opportunities for people to contribute gifts that will have a perpetual benefit to those served by Wilder. The board established the following endowment funds:

- Wilder Foundation (General Use)
- Services to Children and Families
- Services for the Elderly
- Wilder Center for Communities
- Wilder Research
- Children's Mental Health
- Supportive Housing
- Children's Residential Services

The principal of these endowment accounts is reserved for future strategic initiatives that may require long-term capital accumulation. Only by action of the Wilder Board of Directors, is the principal of quasi-endowment accounts released.

## NAMED ENDOWMENT FUNDS

Gifts of \$10,000 or more may establish named endowment accounts. Once established, donors can add gifts of any size to the funds. Wilder invests named endowment accounts and Wilder's endowment funds together. Over time, Wilder uses a portion of the income from the principal to support its general operations and specific programs.

### Amy Benzick Memorial Fund

Amy's father, William (Bill) Benzick, established The Amy Benzick Memorial Fund to enhance services to children. Bill's vision is for children with special challenges to have opportunities to develop to their full potential.

### Elizabeth Bogared Elderly Services Fund

Elizabeth Bogared was a member of the Wilder Senior Center for three years prior to becoming their receptionist at age 73. She worked for Wilder in several different capacities until her retirement at age 89. After a stroke, Elizabeth moved to Wilder Residence East and lived there until her death at age 97. Income from her bequest funds activity programs for older adults.

### Ronnie Brooks Leadership Fund

Alumni and friends of the James P. Shannon Leadership Institute established the Ronnie Brooks Leadership Fund to honor Ronnie Brooks and her service as the Institute's founding director. The fund subsidizes participation in the Institute's nonprofit leadership development programs.

The James P. Shannon Leadership Institute provides experienced nonprofit, civic and community leaders a yearlong experience integrated with their work and designed to foster clarity, creativity and a renewed commitment to service. Participants clarify the purpose of their work, the core values they want their lives and work to exemplify, and the strategies they can pursue to enhance effectiveness and satisfaction. The result is a cadre of leaders with the focus, energy and dedication our community needs.

Participants grow in knowledge of self, commitment to service, feelings of success and connection to others, thereby setting the stage for more vital leadership. The Institute directly addresses the need to retain proven leaders and ensure they are able to sustain the purposeful, ethical and effective leadership our communities need.

## The Center for Children with Reactive Attachment Disorder Fund

Reactive Attachment Disorder (RAD) is a serious psychological condition associated with children who have experienced severe physical, sexual, and/or emotional abuse, neglect, abandonment or separation from parents at a very young age. These children have experienced a major disruption in the bonding process between parent and child. They are unable to form loving relationships and exhibit a host of psychological, behavioral and developmental problems because of their traumatic past.

Started in 2001 with a \$1,000,000 endowment grant from the Bush Foundation, The Center for Children with Reactive Attachment Disorder uses a multi-sensory approach. The goal of this therapy is to bring the child to a level where they will feel safe and comfortable exploring unresolved trauma. The Center provides research into effective treatment models and training for caregivers that promote healthy attachments.

## Community Research Associates Fund

Community Research Associates, Inc. incorporated in New York, New York on April 19, 1949. In 2006, Richard Dethmers, on behalf of Community Research Associates, Inc., approached Wilder Foundation regarding dissolving its non-profit and gifting its remaining assets to establish an endowment fund to benefit Wilder Research. Wilder Research and Community Research Associates share similar visions.

The purpose of the Community Research Associates Fund is to engage exclusively in charitable, scientific, literary or educational activities through the medium of social research, for the improvement of welfare, health, recreational and other civic services. The research, studies and surveys of civic conditions are designed to improve the welfare and happiness of humanity by making materials from studies and surveys available through publications, consultation and otherwise.

## Hildegard H. Conkling Fund

The Hildegard H. Conkling Fund originated through a charitable remainder trust and a bequest. Hildegard was born in Saint Paul in 1901 and lived to age 94. She loved her home at Wilder Residence West and considered Wilder employees her family.

# Amherst H. Wilder Foundation

## **Dr. Phil Edwardson Fund for Children**

Dr. Edwardson joined Wilder in 1970 and became medical director of the Child Guidance Clinic in 1980. When he retired in 2001, his family and colleagues established The Dr. Phil Edwardson Fund for Children to honor Dr. Edwardson's commitment and contributions to the field of children's mental health. The fund supports efforts to provide effective, affordable mental health services to children from the East Metro, especially those with the least access and greatest need. As a child psychiatrist at Wilder's Child Guidance Clinic, Dr. Edwardson treated more than 1,000 children.

## **Lorraine M. Ellingsen Fund**

Lorraine volunteered at Wilder Senior Citizen Center. She died at the age of 95 and bequeathed to Wilder more than \$1.2 million dollars for general support. The Lorraine M. Ellingsen Trust provided income for her two brothers; however, her brothers predeceased her, resulting in direct distribution of her estate to charities.

## **Frank M. DeForce Fund**

In 1875, when he was 20 years old, Frank DeForce moved to Saint Paul's Lowertown from East Erie, Pennsylvania. He worked as a messenger for American Express for fifty years. In 1929, Mr. DeForce married Mae Schwab, a stenographer for a prominent Saint Paul attorney. They were married for eight years until his death in 1937. Mae eventually moved into the Protestant Home where she later died at the age of 85 years.

The Frank M. DeForce Fund originated through the will of Mr. DeForce, who wished to support the work of The Home for the Friendless Association of the City of Saint Paul. The Home for the Friendless Association later became the Protestant Home. In 1974, the Protestant Home merged with the Wilder Foundation, establishing Wilder Residence East. Wilder received the proceeds of the trust to support the needs of older adults.

## **Mary E. Gillis Fund**

When Mary Gillis drafted her will in 1930, a portion of her estate was to be placed in trust to provide income for her son, grandson, and a close friend. In 1992, the Protestant Orphan Asylum received the remaining principal.

The Protestant Orphan Asylum became part of Children's Services, Inc. and later liquidated its assets to the Amherst H. Wilder Foundation. In 1993, the court granted Wilder the remainder interest. Earnings from the Mary E. Gillis Fund support services for children.

## **John Hauschild Corporate Administration Fund**

John Hauschild joined the Wilder Foundation in 1983 as Vice President of Finance. He became Treasurer in 1990 and skillfully managed the Wilder Family Trust. John's fiscal conservatism and attention to the markets served the Foundation well. John was proud of the Wilder mission and realized the valuable role Corporate Administration played in fulfilling it. With support from Gemini Corporation, John established a two-life insurance policy and requested the proceeds endow educational and recognition programs for the Wilder Foundation's Corporate Administrative personnel. Since John's death in 1998, gifts in John's memory help fund his named endowment account as will the insurance policy proceeds when they mature.

## **Adriana and Herman Hertog Memorial Fund**

Adriana and Herman Hertog immigrated to the Twin Cities from Holland in 1926. Herman worked for Burlington Northern as a track department supervisor and Adriana helped in the kitchen at Mechanic Arts High School in Saint Paul. In 1985, Adrian, Herman and John Hertog memorialized their parents through a gift, establishing The Adriana and Herman Hertog Memorial Fund to enhance volunteerism by strengthening recruitment, orientation and recognition of volunteers. Adriana was an enthusiastic Wilder volunteer in elderly services.

## **Dale A. Hoover Fund**

The Dale A. Hoover Fund originated in 2001 through an outright gift from Dale's widow, Martha, and her three daughters, Margaret H. Hoover-Maroon, Catherine A. Rudenick and Joelle R. Whitson. The fund supports children and families services. Dale grew up on a farm in Kansas and later came to Saint Paul to find work. He served in the Marine Corps from 1942 to 1945 and earned a Bronze Star for bravery under fire. Before shipping out to the South Pacific Guadalcanal, he married his Saint Paul sweetheart, Martha. After the war, Dale and Martha settled in Saint Paul and raised their three daughters.

## **Mary D. and Irving J. Jerry Family Fund**

A lifelong resident of the Saint Paul area, Mary Jerry was the daughter of Swedish immigrants. She did not have a lot growing up. Mary remembered her brothers swimming at the Wilder baths in Saint Paul, along with Wilder's services for the poor. Her husband, Irving, the son of French immigrants, ran an auto repair business. Mary and Irving married and together raised four children. In 1940, they moved to Saint Paul Park where they

both lived long lives into their nineties. Mary's charitable bequest established the Mary D. and Irving J. Jerry Family Fund for Wilder's general purposes.

## **The Kingston Fellowship**

Tom and Mary Kingston dedicated their professional and personal lives to serving the needs of the most vulnerable of our community. Tom was an extraordinary leader, active in the Saint Paul community for more than forty years. He retired from Wilder on June 30, 2010 at age 65 after thirty years, the last twenty as its fifth President. Mary's deep concern for the vulnerable, particularly those facing mental health challenges, led her to become a clinical psychologist.

The purpose of the Kingston Fellowship is to honor Tom Kingston upon his retirement as President of the Wilder Foundation and develop a highly effective, culturally competent and fully credentialed set of leaders within the Wilder Foundation. The result will be ongoing improvement of human services in the entire community.

Proceeds from the fund provide Kingston Fellows with the opportunity to study, teach, conduct research, exchange ideas and develop innovative programs to address community concerns. Fellows are chosen for demonstrated accomplishments in their discipline, commitment to the field of human services, and leadership potential.

## **Kofi Forever Fund**

Established in 2008 by a group of donors, Kofi Forever Fund seeks to sustain and enhance the innovative array of Kofi Services for African American youth at disproportionate risk of school failure, involvement in illegal activities that land them in the juvenile justice system, and continuance of serious problems. Services to African American youth and their families are among the greatest need in our community.

As an example, Kofi Services is a culturally specific, culturally affirming school-based mental health program developed to increase positive functioning of African American youth in their homes, schools and communities. "Kofi" derives from a word meaning "child of growth" in Akan Asente, a Ghanaian dialect. Kofi Services approaches African American youth in a holistic way, providing an opportunity to receive needed mental health services while developing a sense of identity, self-confidence, cultural affirmation, and hope.

Youth served by Kofi Services manifest serious behavioral and emotional disturbances. Many have experienced violence and exhibit attentional deficits.

Most often, their parents are single, low-income, and struggling to overcome the barriers presented by racism and poverty. At the same time, they are responding to their child's mental health needs and assuring they receive a strong education.

Since its inception in 1991, Kofi Services has aimed to reduce mental health care disparities and stigma, and improve the likelihood of success for African American youth with severe behavioral and emotional disturbances. Kofi Services has six objectives: 1) Improve mental health status; 2) Improve behavior at home, in school and in the community; 3) Teach anger management and conflict resolution skills; 4) Maintain or improve academic performance and attendance; 5) Develop positive self-perception and cultural pride; and 6) Increase parental involvement in school and educational activities.

Kofi Services uses evidence-based practices and proven interventions. The public schools are the venue for providing services during the school day. The school setting is optimal for collaborating with teachers and parents about how best to respond to challenging problems and behaviors at school. Education, prevention, and interventions will equip African American youth with skills and information that has the potential to move Kofi graduates towards self-sufficiency, resilience, and personal success—forever.

### **Francis and Verona LaBelle Children's Health Care Fund**

Francis had a severe thyroid problem as a teenager. He lived with a brother in Saint Paul in order to receive critical medical care. His family was very poor and he received free care from the Wilder Health Clinic. Francis never forgot the care he received from Wilder, and when able, he decided to repay the Foundation for its kindness.

After his recovery, Francis worked in a lumber camp, a candy factory, and on his father's dairy farm in Centerville, Minnesota. In 1934, Francis and Verona were married and they purchased the 60-acre family vegetable farm. They later sold the farm and moved to Saint Paul where Francis worked with a construction and remodeling firm. In 1948 they moved to Forest Lake (Verona's hometown), and he began a company, LaBelle Construction, that developed land and built homes.

In 2000, Francis and Verona established an endowment fund, to which they subsequently added gifts, with a gift of stock given in gratitude for the care Francis received. Children's health services, including mental health care, are the beneficiaries of the proceeds from this fund.

### **Otto Link Elderly Services Fund**

John and Catherine Hill established the Otto Link Elderly Services Fund in 1974 through a trust to which they subsequently added gifts. They named the fund in memory of Catherine Hill's father who lived at Wilder Residence West. The Hills made the gift to show appreciation for the care and concern Wilder employees gave Otto during the last years of his life. Their gift provides income to enhance Wilder's services to older adults.

### **Louise and George Mairs Fund for Community Research**

During his 50-year career in the financial industry, George A. Mairs earned a reputation for astute investments backed by sound research. George approached his charitable "investments" with the same thoroughness and attention to detail. Wilder Research's role in identifying unmet community needs impressed him. Research enables Wilder to design and execute programs that respond to those needs. Just as important, Wilder is willing to discontinue programs when research shows there is no longer a need or when others address the need.

Wilder Research is one of the largest nonprofit centers in the United States dedicated solely to applied research and evaluation in the human service field. It strives to help families and communities thrive, get at the core of community concerns, and raise issues overlooked or poorly understood. George became convinced there was a need to support this important work. His gifts fund a Wilder Research named fund and honors the memory of his parents, Louise and George Mairs.

### **L. Frank and Irene Maistrovich Fund**

Frank and Irene were kind and loving people. Frank was a disabled World War II veteran. After the war, he obtained a degree from the University of Minnesota and took a job with the Internal Revenue Service, where he worked until his retirement. Irene was born in Montana. She taught school, and eventually became an office manager for a local architectural firm. They married later in life and never had children.

During their lifetimes, their charitable donations and gifts always focused on people in need. Their estate reflected the same philosophy, leaving the greatest gifts to those who needed it most or charities serving the most vulnerable. Frank and Irene requested proceeds of their charitable remainder unitrust provide general support for Wilder services.

### **Charles Naumann McCloud, M.D. Memorial Fund**

Dr. Charles Naumann McCloud, Jr. (1912–1998) was a Saint Paul native. He was the son of Dr. Charles Naumann McCloud and Agatha de Lambert McCloud. Dr. McCloud graduated from the University of Minnesota Medical School. He served two years in the European theatre in World War II, then lived and practiced medicine in Saint Paul. His wife, Deborah, described her husband as "a kind and concerned physician and family man. He made house calls every night and especially on Sundays. He was unpretentious with a good sense of humor, enjoyed fly fishing, birding and friends." Mrs. McCloud memorialized her husband with an unrestricted fund bearing his name.

### **Dorothy K. Merrill Fund**

Dorothy Kadas Merrill grew up on Saint Paul's East Side and spent the last forty years of her life as a resident of Woodbury. Her husband, Stanley, was a business person who died many years before Dorothy. Dorothy was a baker, master tailor, accomplished blackjack player, investor and philanthropist. Because she cared about children and the community, the Wilder Foundation was a significant part of her philanthropic legacy. Dorothy's fund is unrestricted.

### **Roberta A. Mundschenk Children's Fund**

Roberta Mundschenk's path to serenity led to her garden, a quiet place where she could escape the world and get lost in beauty. She loved children, gardening and walking. This love was the inspiration behind the creation of her labyrinth at Bush Memorial Children's Center. The labyrinth gave children a quiet place to escape the troubles they faced and allowed them a place to reflect and collect their thoughts just as Roberta had in her garden.

In addition, proceeds from her Charitable Remainder Unitrust established a named fund to enhance and improve the lives of vulnerable children served by Wilder programs through "extras" not included in program operating budgets. Her gift helps children in ways most helpful to them and rotates annually between programs serving children based upon the prioritized needs of the programs. Funds may be used for but are not limited to sporting equipment, therapeutic toys, special outings, gardening activities, educational resources, or speakers for children and staff.

### **Harry T. and Helen I. Nagel Children's Fund**

You can imagine the surprise when John Nagel, Wilder Foundation Treasurer, saw his father's name (Harry) in the journal of children admitted to the Protestant Orphan



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Asylum in 1902. He remembered his father mentioning that he, along with his brother and sister, were placed in an orphanage after his grandfather died. Harry's newly widowed mother couldn't take care of the children until she regained the financial ability to raise the family. Seven months later, the children reunited with their mother and their family life resumed.

This discovery, along with deep Saint Paul roots dating back to the mid-1800s, prompted John and his wife, Renee, to establish a named fund in memory of John's father and mother. They chose the Wilder Foundation because the Protestant Orphan Asylum was the forerunner of children's residential programs at Wilder. Earnings from this fund help children and families, especially low-income and at-risk youth and families.

## **Walter and Eleanor Nyberg Fund**

Walter and Eleanor enjoyed hiking the trails, pristine woods, meadows and farmland at Wilder Forest with the Minneapolis Hiking Club. Realizing there are annual expenses to maintain over 1,100 acres and numerous buildings and programming, Walter and Eleanor dedicated the remainder interest from their charitable gift annuities and charitable bequest to a named fund supporting Wilder Forest. Their generosity will help future generations enjoy the wonders of nature. Walter and Eleanor left their entire estate to advance peace and social justice causes and many charitable missions.

## **Jeanne and George C. Power, Jr. Fund**

In 1993, George Power, Jr. read the book "Amherst H. Wilder and His Enduring Legacy to Saint Paul" and learned that his grandfather, George C. Power, was one of the six Wilder family friends who filed the original articles of incorporation to create the Wilder Charity. In fact, his grandfather was the first vice president of Wilder in 1910. The first George C. Power served as a Wilder trustee until his death in 1912. When George C. Power, Jr. read about his grandfather's involvement, he decided to help build Wilder's endowment.

George returned from World War II in 1946, and with his wife, Jeanne, settled in Saint Paul less than two miles from the homes of his father and grandfather. George joined the George A. Mairs investment firm in Saint Paul. The firm prospered and, in 1954, was renamed Mairs and Power. George served on Boards for several community organizations as well as the Episcopal Church in Minnesota until his death in 1995.

George C. Power, III made an additional gift to establish a named fund in memory of his parents, Jeanne and George C. Power, Jr. for general support.

## **Sister Helen Louise Roth Fund**

This endowment fund memorializes the life of Sister Helen Louise Roth. The Wilder Foundation received a contribution, representing its remaining assets, from the trustees of the former Juvenile Horizons program. Wilder Trustees established a named fund for Wilder programs.

## **Leonard H. Tesmer Fund**

A gift by will established The Leonard H. Tesmer Fund to help underwrite Wilder's work with emotionally disturbed children. Leonard was born and raised in Saint Paul, graduated from John Marshall High School, and served in the Navy during WWII. After the war, he worked for Union Depot, and Burlington Northern.

Leonard received counseling from Wilder Child Guidance Clinic as a young boy. He never overcame his emotional difficulties and came to believe more therapy, as a child, would have decreased the severity of his lifelong mental health challenges. From this experience, it became his goal to help children with emotional problems.

## **Robert H. Tucker Fund**

Bob Tucker (1911–1998) spent most of his life living and working in Saint Paul. He graduated from University High, the University of Minnesota law school, and worked for 3M for 34 years.

Bob was a member of the Wilder Board from 1971 to 1981, serving as vice president and president. His leadership significantly broadened human services to include affordable housing, corrections programs, children's educational and residential programs, and expanded services for older adults.

Bob's community involvement included terms as president of several organizations, including the Saint Paul United Way, Saint Paul School Board, YMCA of Greater Saint Paul and the Boy Scout Council. He served as trustee at Hamline University and as a member of the Minnesota Pollution Control Agency.

Bob was concerned for children, older adults and families. His gift by will established the Robert H. Tucker Fund to support Wilder services.

## **Victor M. Watkins Fund**

The Victor M. Watkins Fund originated through the will of his daughter, Anne Watkins Wilder. Victor Watkins served as financial secretary to Amherst Wilder and was the first chief executive of the Wilder Foundation from 1905 until his death in 1921.

Anne Wilder's will designated that, upon her husband's death, the proceeds of her estate form a corporation called the Victor M. Watkins Convalescent Home. Her husband, Colonel William T. Wilder

(no relation to Amherst H. Wilder) died in 1957. The value of her estate at that time was approximately \$240,000.

In accordance with her will, the Foundation created a corporation and designated that a portion of a planned health care center for older adults should serve formerly employed women. From 1961 to 1999, the second and third floors of the east wing of the Wilder Infirmary at 512 Humboldt Avenue became the Victor M. Watkins Convalescent Home. Ramsey County District Court designated the Watkins fund to help fund Wilder's Juvenile Horizons Home (renamed Watkins Center) to support pregnant and parenting adolescent girls from 1999 to 2003.

In November 2003, the District Court approved the use of the Watkins Fund for programs and services of the Wilder Foundation that benefit women over the age of 12 in need of services to maintain or achieve self-sufficiency.

## **Paul W. & Lucille O. Werner Fund**

Paul was a "salt of the earth" husband and father of four, who worked in a creamery, drove truck and school bus and was a school custodian. His uncommon discipline and drive led him to take up marathon running in his retirement. He completed 13 marathons and even after moving into a long-term care facility for residents with dementia, he continued to run. Paul passed away at the age of 96. Wilder's mission of serving the poor, sick and needy resonated with his Christian faith. He was grateful for life's blessings and practiced tithing. His gift benefits children and families in need.

## **Reta G. Youngman Research Fund**

Reta was born in Canada and moved to Minnesota to attend the University of Minnesota at the urging of her mother, who wanted her daughter to have a better life. She majored in English, Dental Hygiene and French. She worked in Public Health, traveling to give dental care to young children. Through this work, she grew to love working with young Hispanic children. She traveled to Central America to volunteer and studied Spanish. Reta left her entire estate to Wilder Research as it relates to children and youth development and education. She believed Wilder was best at helping immigrant families learn the language and achieve success in schools. She chose Wilder because "everyone in her family did quite well in life."

## Endowment Accounts Report – Fiscal Year 2010

### Current Investment Policy

Over time, the investment goal for the Endowment Fund is to achieve a total return (current income plus market gain) of 5.0 percent plus the rate of inflation.

### Investment Performance

The original \$2.6 million bequest that started the Wilder Foundation has grown to more than \$156 million because of sound investment policies.

### Current Spending Policy

When a donor makes a gift designated for endowment, the Amherst H. Wilder Foundation holds the funds in perpetuity. Wilder invests the principal and a portion of the return is available each year to support the designated program. The Foundation changed its policy on use of endowment funding from 5% of a five year moving average to a spending formula based on a 70% factor for prior expenses adjusted for inflation (60%

from the previous year, 30% from two years ago and 10% three years ago) plus a 30% factor based on 5.5% of the endowment balance. The foundation transfers anything remaining back to the endowment so that it continues to grow and provide future funding for the purpose designated by the donor. The Foundation manages the endowment in order to maintain the inflation-adjusted purchasing power of the endowment.

Supporting Funds	Adjusted Principal Balance 7/1/2009	Net Investment Total Return	Amount Used for Donor Purposes	New Gifts/ Additions to Principal	Principal Balance 6/30/2010
<b>Amherst H. Wilder Family Endowment</b>	<b>\$148,732,847</b>	<b>\$14,433,114</b>	<b>(\$12,695,686)</b>	<b>\$0</b>	<b>\$150,470,275</b>
<b>ADDITIONS TO THE WILDER FAMILY ENDOWMENT</b>					
<b>Wilder Foundation General</b>					
Board Designated Fund (General)	151,450	14,697	(7,573)	9,158	167,732
Hildegard H. Conkling Fund	134,080	13,011	(6,704)		140,387
Lorraine M. Ellingsen Fund	1,028,604	99,816	(51,430)		1,076,990
John Hauschild Corporate Administration Fund	11,493	1,115	(575)		12,033
Adriana & Herman Hertog Memorial Fund	9,310	903	(466)		9,747
Kingston Fellowship Fund	95,678	9,285	(4,784)	303,107	403,286
L. Frank & Irene Maistrovich Fund	27,568	2,675	(1,378)		28,865
Charles Naumann McCloud, M.D. Memorial Fund	32,930	3,196	(1,646)		34,480
Jeanne & George C. Power, Jr. Fund	8,661	840	(433)		9,068
Robert H. Tucker Fund	15,149	1,470	(757)		15,862
Paul W. & Lucille O. Werner Fund		0	-	8,141	8,141
Anonymous Fund In Honor of Staff	10,000	970	(500)	6,000	16,470
<b>Services to Children &amp; Families</b>					
Board Designated Fund (Children & Families)	52,819	5,162	(2,660)	3,646	58,967
Board Designated Fund (Children's Residential)	64,169	6,191	(3,190)		67,170
Board Designated Fund (Housing)	18,237	1,770	(912)	2,463	21,558
Board Designated Fund (Mental Health)	648	63	(32)		679
Children's Health Care Fund	31,025	3,011	(1,551)		32,485
Amy Benzick Memorial Fund	33,649	3,265	(1,682)		35,232
Center for Children with Reactive Attachment Disorder	782,821	75,965	(39,141)		819,645
Dr. Phil Edwardson Fund for Children	9,778	949	(489)	157	10,395
Mary E. Gillis Fund	46,209	4,484	(2,310)		48,383
Dale A. Hoover Fund	41,844	4,061	(2,092)		43,813
Mary D. & Irving J. Jerry Endowment	19,285	1,871	(964)		20,192
Kofi Forever Endowment Fund	41,789	4,055	(2,089)	14,400	58,155
Frances & Verona LaBelle Children's Health Care Fund	9,231	896	(462)	7,105	16,770
Roberta A. Mundschenk Children's Fund	67,247	6,526	(3,362)		70,411
Harry T. & Helen I. Nagel Children's Fund	46,284	4,491	(2,314)	5,100	53,561
Walter & Eleanor Nyberg Endowment Fund	45,119	4,378	(2,256)		47,241
Sister Helen Louise Roth Fund	4,298	417	(215)		4,500
Leonard H. Tesmer Fund	189,003	18,341	(9,450)		197,894
Victor M. Watkins Fund	843,838	81,886	(42,192)		883,532
<b>Services to Older Adults</b>					
Board Designated Fund (Older Adults)	36,477	3,540	(1,824)	1,786	39,979
Elizabeth Bogared Elderly Services Fund	52,843	5,128	(2,642)		55,329
Otto Link Elderly Services Fund	149,048	14,464	(7,452)	12,113	168,173
<b>Wilder Center for Communities</b>					
Board Designated Fund (WCC)	5,546	538	(277)		5,807
Ronnie Brooks Leadership Fund (Shannon Institute)	158,410	15,372	(7,921)	9,699	175,560
<b>Wilder Research</b>					
Board Designated Fund (WR)	19,051	1,849	(953)	6,125	26,072
Community Research Associates Fund	22,785	2,211	(1,139)		23,857
Louise & George Mairs Fund for Community Research	757,703	73,528	(37,885)		793,346
Reta G. Youngman Research Fund	697,844	67,719	(34,892)	2,175	732,846
Additions to Wilder Endowment- Subtotal	5,771,920	560,108	(288,594)	391,175	6,434,613
<b>Total Wilder Foundation</b>	<b>154,504,767</b>	<b>14,993,222</b>	<b>(12,984,280)</b>	<b>391,175</b>	<b>156,904,888</b>
<b>Bank Trust Companies</b>					
US Bank-Frank M. DeForce Fund	174,786	18,000	(11,880)		180,906
<b>Total Funds Supporting Wilder Foundation Programs</b>	<b>\$154,679,553</b>	<b>\$15,011,222</b>	<b>(\$12,996,160)</b>	<b>\$391,175</b>	<b>\$157,085,794</b>

# Amherst H. Wilder Foundation

We thank the following individuals, families, foundations, organizations and businesses that supported our clients and programs with financial contributions or donated goods and services during the past fiscal year (July 1, 2009 – June 30, 2010). We have made every effort to ensure the accuracy of our donor lists. If a name has been inadvertently omitted, please contact the Office of Resource Development, [laura.brown@wilder.org](mailto:laura.brown@wilder.org).

## LEGACY BUILDERS

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**Wilder Legacy Builders are a special group of individuals who have pledged \$5,000 or more to be given over five or fewer years to sustain and enhance the Wilder mission.**

**Wilder Legacy Builders, along with Wilder Heritage Partners, are invited to an annual recognition event to celebrate their unique commitment to Wilder's vision:**

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## KINGSTON FELLOWSHIP FUND

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## VOLUNTEERS

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The Wilder Foundation would like to thank all of the volunteers who gave their time to support vulnerable families in the East Metro area. Volunteers play a crucial role in every aspect of the Wilder Foundation's life-changing work, including:

- delivering nutritional meals to our older adults and people with disabilities
- helping our youth learn skills and develop as leaders
- teaching computer skills to community members
- motivating older adults to improve their health through exercise
- assisting teachers by reading to children.

In 2010, the time donated to the Wilder Foundation by more than 700 volunteers was valued at \$270,000. We would like to recognize the gifts of time, talent and energy donated by our volunteers throughout the year. Your efforts helped serve those most in need in our community. **THANK YOU!**

# Amherst H. Wilder Foundation

Here for Good

The Wilder Foundation thanks these generous sponsors for their support of our fall 2009 Building on the Legacy Fundraising breakfast. Their critical support helps build awareness of Wilder's work in the community and ensures that all contributions to the Wilder Foundation directly benefit Wilder programs.



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**Here for good.**

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