

Making the most of a bequest to benefit your favorite charities AND your family

by Tom McSparron

You might be concerned that by including an estate plan gift to a charity, like West Central Initiative or one of our component funds, there will be fewer assets left for children, family and friends. But there are opportunities available to you to positively impact your favorite charity and leave more than you thought for loved ones.

Because of potentially heavy taxation, retirement plan assets can be among the most expensive for family to inherit. By naming a charity as a beneficiary of all or part of your retirement plan assets, you can leave other less-taxed assets to your heirs.

You also may be thinking that using your retirement assets

as charitable gifts will be a complicated and expensive plan to execute. In truth, all it takes is a simple change on the beneficiary form with the company holding the plan.

Contact Tom McSparron (tom@wcif.org) or Kim Embretson (kim@wcif.org) at 218-739-2239 or 800-735-2239 for information today. Ask our development professionals how planned giving can help you achieve long-term financial goals and make the most of your generosity.

Please remember this column is not intended to be legal or financial advice and WCI strongly recommends that you consult your legal or financial advisors before entering into or making any changes to your estate plans.

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our mission

Serving to improve west central Minnesota through funding, programs and technical assistance.

our vision

Uniting ideas and resources to help people and communities create a better tomorrow.

West Central Initiative is an equal opportunity provider, lender and employer.



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FOCUS

on the region

Brad Barth named CEO of West Central Initiative

Brad Barth has been named president/CEO of West Central Initiative by the WCI Board of Directors. He will begin his duties with WCI in July.

Reporting to the WCI Board, Barth will lead, direct and manage the organization and guide its strategic direction. He will also serve as WCI's chief spokesperson and represent the west central region to the greater state of Minnesota.

“Brad is a proven leader who is prepared to continue the excellent work of WCI,” said Dean Simpson, chair of the WCI Executive Search Committee. “Brad will join the professional resource team at WCI that has a long history of serving the needs of West Central Initiative’s communities. We look forward to his enthusiasm in leading West Central Initiative into the future.”

“The work of the WCI Executive Search Committee was outstanding and I am pleased with their decision in selecting Brad Barth to lead WCI,” said WCI Board Chair David Nelson. “Brad will build on an already diverse and talented team committed to furthering WCI’s mission to

Continued inside.

West Central Initiative's Quarterly Report
SPRING 2015

FOCUS on the region

5 Things to Know about Brad Barth

Continued from front page

improve the economy, community and philanthropy in west central Minnesota. The leadership provided by Sandy King as interim president/CEO was appreciated during this time of transition.”

Barth is currently the executive director of the North Dakota State College of Science (NDSCS) Foundation in Wahpeton, ND. Since 2008, he has led the development efforts of NDSCS and has helped the foundation to double its assets to more than 17 million dollars. Prior to NDSCS, Barth was the director of the Small Business Center at Alexandria Community and Technical College. He is a board member of the Association of Fundraising Professionals Northern Plains Chapter. A Barnesville, Minn. native who graduated from NDSCS and Minnesota State University-Moorhead, Barth and his wife, Diane, will be making their home in Fergus Falls.

“I’m excited to join the WCI team. It is an organization I have greatly admired and respected for many years,” Barth said.

WCI contracted with Richard Thompson and Associates, Inc. to conduct a nationwide candidate search for WCI’s senior executive position, after the departure of Nancy Straw in November 2014.

Knute Nelson receives 2015 Competitive Workforce Grant Award

The Knute Nelson Foundation is a recipient of West Central Initiative’s 2015 Competitive Workforce Grant award to pilot a Certified Nursing Assistant (CNA) program at the Alexandria Area High School (AAHS).

The Knute Nelson Foundation will receive \$17,900 start-up funding for a Certified Nursing Assistant program to be taught at AAHS. The new CNA education program is a collaboration between Knute Nelson, AAHS and Alexandria Technical and Community College. Students who successfully complete the training will receive a CNA credential in addition to both high school and college credit at no cost to the student. It will be the first industry-recognized credential at AAHS as part of its Health Sciences and Human Services Academy.

“The expansion of a CNA education program at the high school will positively impact students pursuing health care careers, health care providers and the broader community of Alexandria. Our greatest hope with this collaborative partnership is to encourage youth to consider health care careers and lead them down their career pathway equipping them with valuable skills along the way,” said Mark Anderson, Knute Nelson President/CEO.

The purpose of WCI’s Competitive Workforce Grant award is to improve the economy of west central Minnesota by providing one year of start-up funding for stakeholders to launch new, promising workforce development strategies.

The CNA education pilot program was chosen because of its capacity to:

- Meet the needs of both employers and workers in west central Minnesota;
- Allow an organization to stretch and experiment with new ways to address skill shortages in west central Minnesota; and
- Test promising approaches likely to result in people securing jobs that pay family-sustaining incomes.

The next round of the Competitive Workforce Grant opens early 2016.



The CNA program team (left to right): Knute Nelson President/CEO Mark Anderson, Knute Nelson Senior VP of Operations Angie Urman, Knute Nelson Foundation Executive Director/VP Katie Perry, WCI Program Director Wendy Merrick, ATCC Executive Vice President of Academic Affairs Jan Doebbert, ATCC Dean of Academic Affairs and Students Gregg Raisenan and District 206 Assistant Superintendent of Teaching and Learning Julie Critz.

Thanks, Valspar, for 16 years of helping make “Minnesota Beautiful”

After 16 years, Valspar Paints decided to discontinue its Minnesota Beautiful (formerly Picture It Painted) program to provide paints for community projects throughout Greater Minnesota. WCI and our sister Minnesota Initiative Foundations facilitated the program within our regions. Here are some of the impressive numbers that show the impact Minnesota Beautiful made over the years:

- Total number of projects: 186
- Total gallons awarded: 9,588
- Total estimated value (assuming \$20/gallon): \$191,760

We couldn’t do as much without our funders

West Central Initiative designed its grant programs with community-level growth and strengthening in mind. There are guidelines that staff must adhere to, to keep within compliance of our organization’s granting goals. Sometimes a project rolls around that stems out of the one of our program areas that does not quite fit the WCI grant guidelines but can fulfill the overall mission of our organization. It is at that time we seek outside funding sources.

The Early Childhood Initiative (ECI) is a great example on how a program can leverage outside funding to help individual projects and programs grow. WCI appreciates all our present and past funders. Here are some of the most recent ECI grants received:

The McKnight Foundation was one of the original funders for the Early Childhood Initiative and continues its commitment for community organizing around young children.

The Mardag Foundation provided three years of funding to help build the early care and education Parent Aware rating system in Clay County.

The Frank W. Veden Charitable Trust has made multiple gifts to the Early Childhood Dental Network to expand dental access and oral health education in west central Minnesota.

The Otto Bremer Foundation has provided a number of grants through the years, but most recently provided funding to replicate the work done through the Early Childhood Dental Network in other parts of the state.

The Medica Foundation helped fund evidence-based home visiting curriculum training for partnering agencies in west central Minnesota.

And our most recent grant has been awarded through **The Sheltering Arms Foundation** to help defray the cost of an intensive training called Circle of Security for mental health professionals, parent educators and others who work with young children and their parents.

The growth of the Early Childhood Initiative would not have the reach and strength it has today without the help of our funders.

Help us welcome Brad!

Watch for “Get to Know Brad” events in your area too!

The WCI Board of Directors invites you to an Open House for Brad Barth
1-2:30 p.m., Thursday, July 16
West Central Initiative
1000 Western Ave. Fergus Falls