



PHILANTHROPY STARTS HERE



A Letter from the Generosity Team

As your community foundation, West Central Initiative is here to ensure that your generosity creates lasting impact for generations to come.

Every day, I see the power of people who care deeply about their neighbors and communities, turning compassion into action. Whether you're passionate about early childhood care and education, economic development, climate action, or another cause close to your heart, we're here to make your giving easy, meaningful, and effective.

We work side-by-side with individuals, families, and organizations to align their giving with local needs and opportunities. Together, we ensure that every gift supports projects that strengthen west central Minnesota and White Earth Nation.

Many of our donors also look to the future, and we're honored to help them create lasting legacies. Through estate planning and charitable giving services, we make sure their values continue to shape a vibrant, inclusive, and sustainable region for generations to come.

When you give to—or through—West Central Initiative, you're not just making a donation. You're building a better tomorrow for everyone who calls this region home.

With gratitude,

Rebecca Lynn Petersen
Director of Development & Philanthropic Services
West Central Initiative



Why Partner with Us

When you choose West Central Initiative to steward your gifts, you're investing in a courageous, collaborative, and deeply rooted partner, ensuring your generosity builds a thriving region for generations. **As your philanthropic partner we:**

▶ **Share your vision for a thriving region**

At West Central Initiative, our core purpose is empowering a thriving, sustainable region with abundant opportunity and a great quality of life. We maximize every dollar for the communities and causes you care about most.

▶ **Know this region—its strengths, needs, and opportunities**

We have deep relationships with our communities, city officials, and the nonprofits that serve our region. We're embedded in the community and understand our region's changing needs, from childcare access to workforce housing to climate resilience. We facilitate cross-sector solutions with local governments, nonprofits, businesses, and residents. This ensures that gifts are invested strategically, with lived expertise guiding decisions.

▶ **Multiply impact through collaboration**

We convene regional partners for collective action and focus on long-term strategies, not isolated projects. This ensures their legacy of giving continues to grow and create new opportunities.

▶ **Steward gifts with integrity, transparency, and impact**

Your gifts will be managed responsibly and create ripples of impact for generations to come. We have decades of experience in:

- Endowment management and fund stewardship.
- Grantmaking and program design that centers on equity and community input.
- Transparent reporting and communication with donors about the outcomes of their generosity.

▶ **Are your neighbors and collaborators**

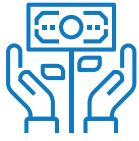
Unlike national entities, we're your neighbors! We're ready to listen, collaborate, and connect you with charities and causes that align with your values and goals. As your partner, we look forward to your phone calls, emails, or in-person visits. We're available to discuss your hopes for building a better region whenever you're ready.



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It isn't just those with great sums of money who can do great things. We all have resources we can invest in our community. As a regional community foundation, I know that West Central Initiative will carefully steward my investments in the region long into the future.

– Beth Grosen

What to Give



Cash



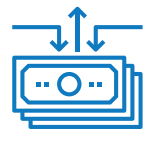
Publicly Traded
Stock



Real Estate &
Farmland



Retirement
Funds



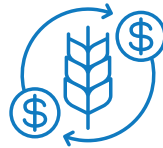
IRA Required
Distributions



Life Insurance
Proceeds



Annuities



Commodity
Grain



Minerals
(Oil & Gas)



Farm
Machinery

FOR INDIVIDUALS AND FAMILIES

Create a Fund

► Donor Advised Funds

Establishing a Donor Advised Fund provides a simple and highly personal approach to giving. We offer a variety of giving tools to help you achieve your charitable goals. You can make a gift of cash, stocks, bonds, real estate or other assets to West Central Initiative or your local community fund. Charitable gifts qualify for maximum tax advantage under federal law.

► Designated Fund

Establishing a Designated Fund allows you to select specific nonprofit organizations to receive grants automatically on an annual basis. By donating to an endowment, you provide a permanent source of support for your preferred charities, which promotes long-term sustainability.

► Field of Interest Fund

By choosing a Field of Interest Fund, you are able to provide grants to advance the unique interests that are important to you such as arts and culture, children and family, health and human services, environment. The Foundation's board utilizes these funds in its community grantmaking processes, applying grant funds to requests within your specified field of interest.

► Scholarship Fund

By creating a Scholarship Fund, you impact the lives of deserving students, turning their dreams of higher education into reality. With Scholarship Funds, you set the scholarship requirement criteria, and the fund may be established in your name, the name of a loved one, or a group such as your high school graduating class.





Give Beyond Your Lifetime

Are you ready to plan your will or trust? We can walk you through the gift planning process, speak with you and your attorney about tax-smart gift options, and help you learn more about how to support the causes you care about after you're gone.

We help you manage your legacy of giving.

- We work with you to create a Memorandum of Charitable Intent, which outlines how you'd like West Central Initiative to support the causes you care about, in your name, after you're gone.
- You can change this memorandum at any time, cost-free—no need to go back to your attorney.
- We can accept and manage a variety of contributions including, gifts of cash, securities, real estate, IRA assets, or other tangible property.

Start planning your legacy using our free [Estate Planning Guide](#) or [Will Creation Tool](#) to record your family information and your estate distribution plans.



Deloris Barnack Kenner grew up and went to school in the Perham area. She continued her education to become a nurse, a career that she held for 50 years. After her passing in 2015, Kenner's mission to support education lives on today through the fund she created with us. Since 2020, we've distributed more than \$458,000 to schools in the Perham and Dent area and awarded nearly \$96,000 in grants from her fund to organizations supporting education in Perham and Dent.



Join the Lasting Landscapes Legacy Society

Your legacy has the power to shape the future of our region for generations to come. By planning a gift to support one of West Central Initiative's regional endowments or an endowment for a local nonprofit or community held at West Central Initiative, you join a growing movement of visionary donors who are helping our people and communities thrive—today and tomorrow.

The Lasting Landscapes Legacy Society recognizes individuals and families who have made a lasting commitment to our region through either a future gift in their estate plan or a major lifetime endowed gift to West Central Initiative.

Membership is open to anyone who has included West Central Initiative in their estate plans or made a lifetime gift of \$10,000 or more to a permanent endowed fund at West Central Initiative. This might be a gift to support West Central Initiative, or it can be a gift to a local nonprofit's endowment held at West Central Initiative.

LASTING LANDSCAPES LEGACY SOCIETY MEMBERS

- ▶ Pamela Bernstein
- ▶ Beth Grosen
- ▶ Inga M. Johnson
- ▶ Deloris Barnack Kenner
- ▶ Lynn Middleton Koller
- ▶ Floyd and Harriet Miller
- ▶ Charlotte Moline
- ▶ Carole Mitchell
- ▶ John Molinaro
- ▶ Steve Guttormson and Nancy Swenson
- ▶ Rebecca Petersen and Mark Solie



Give Land Through the Heartland Giving Farmland Stewardship Program

We recognize how important locally owned, tillable farmland is to the long-term financial stability of our rural communities. That's why we launched the Heartland Giving farmland stewardship program.

Landowners are deeply and personally connected to their farmland. It's not just an asset, it's an important part of their way of life. For those who share this belief and have charitable intentions, **Heartland Giving offers the opportunity to keep the asset in production and under local ownership. It also allows the donor to leave a legacy to benefit local charities that make the community stronger and a better place to live.** The landowner can receive a tax deduction for the charitable portion of the gift, bypass capital gains tax, and reduce potential estate tax liability. We'll continue to pay property taxes on the land so the county maintains its tax base. We also make every effort to rent the land to producers from the area.

Once the gift of land has been made, West Central Initiative retains ownership and manages the asset. We'll use the revenue earned from rental payments to benefit charitable organizations as agreed by the donor and our organization. Several planned giving options are available to donors to best meet their needs and charitable goals, including starting a Charitable Remainder Trust by auctioning off depreciated farm equipment. Taxes from the trust are only paid on annual distributions.



FOR COMMUNITIES

Through Component Funds, we harness the power of collective giving to support local community improvement projects, provide funding for nonprofits, give scholarships, and build a better quality of life for years to come.

Component Funds allow our partners to focus on the charitable needs in their communities and leave the administrative tasks to us.

As a community foundation, one of our roles is to establish and manage dedicated funds that address specific charitable purposes as defined by the IRS as 501(c)(3) nonprofit organizations. We call these funds "Component Funds" because they're part of our mission and asset valuation.

Component Funds function in two ways:

1. Making grants for charitable activities within the fund's specific purpose.
2. Providing rural economic development loans through a revolving loan fund.

These funds generate interest, which can be distributed as grants or reinvested in the fund.

Benefits of creating a Component Fund:

- **Community Impact**
Make a big difference right where you live, with our help.
- **Expert Support**
Trust our local know-how to help you make a real difference.
- **Easy Management**
Let us handle the paperwork while you focus on giving back.
- **Pooling Resources**
Team up with others to make your contributions go even further

Component Fund activities are directed by groups of community volunteers called advisory committees.



Component Funds for Communities

► **Geographic Area Fund (Community Fund)**

A fund created to support charitable initiatives within a specific city, county, or region.

► **Field of Interest Fund**

A fund focused on a particular cause, like education, health, or the arts, allowing donors to target their impact.

► **Unrestricted Fund**

A flexible fund that lets the foundation allocate resources wherever they're needed most in the community.

► **Scholarship Fund**

A fund established to provide financial assistance to students pursuing higher education.

► **Revolving Loan Fund**

A renewable pool of funds that provides loans to businesses or nonprofits, reinvesting repayments to fuel ongoing growth.

► **Project Fund**

A short-term fund created to support specific, time-sensitive community projects or Initiatives.

FOR BUSINESSES



Our **Regional Impact Partners** program invites businesses and corporate partners to invest in the people, places, and possibilities that will shape a stronger future for our region.

Your gift helps plant seeds that will grow for generations by supporting our broad efforts in early childhood, workforce development, rural leadership, and other vital areas throughout the region. Strong communities don't happen by accident. They're built over time by people—and organizations—willing to invest in what matters most. As a Regional Impact Partner you become part of a network of local leaders committed to a lasting legacy.



FOR NONPROFITS

Create an Agency Fund

An Agency Fund is a fund established by a nonprofit to support its mission through investment of assets in an endowment or non-endowed fund structure. Each organization chooses how to utilize the funds to best fit their needs.

Benefits of creating an Agency Fund:

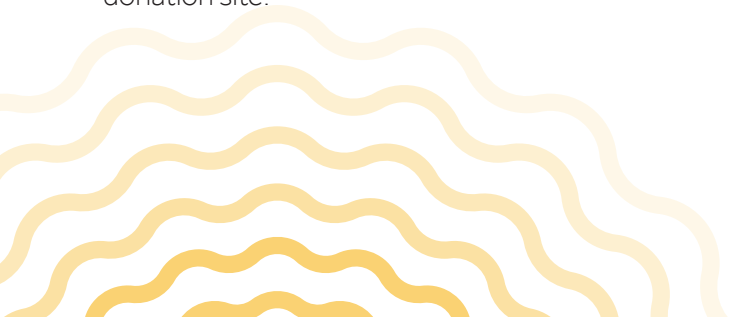
- **Protect Purpose**
Keep your assets aligned with your mission and donor intent for lasting impact.
- **Investment Opportunities**
Grow your fund through professionally managed investment options.
- **Expert Support and Guidance**
Access fundraising training, marketing support, and guidance on complex gifts.
- **Learning Opportunities**
Build knowledge and connections through educational workshops and resources.

For increased visibility, nonprofits can partner with West Central Initiative to create a Field of Interest Fund that provides a customized giving page on our online donation site.

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The Kaddatz Galleries Endowment Fund represents our commitment to building a sustainable future for the arts in our community. As a young organization, we recognize the importance of growing and protecting the resources that will carry our mission forward. West Central Initiative is a trusted and reputable steward with deep roots in our region, and we are proud to partner with them to ensure Kaddatz Galleries can continue serving this area for years to come.

-Nancy X. Valentine, Executive Director of
Kaddatz Galleries



BY THE NUMBERS

All data represents our 2025 fiscal year

271

Component Funds



\$2.32M

Granted from
Component Funds

\$3.41M

Donated to
Component Funds



\$114K

Granted from
Personally Endowed Funds

\$94.2M

Net assets managed on behalf of the region

LET'S GET STARTED!



Contact Rebecca today to learn more.

► **Rebecca Petersen** | *Director of Development & Philanthropic Services*
800.735.2239 | rebecca@wcif.org

West Central Initiative Development Team

Camille Pearson Walz
*Development &
Philanthropic Services
Officer*

Amanda Quam
Grants Officer

Rick Schara
*Community
Engagement Officer*

**Samantha
VanWechel-Meyer**
*Community
Philanthropy Officer*

West Central Initiative Board of Directors

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Becker County

Ryan Rooney
Douglas County

David Schornack
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Pope County

Janice Tweet
Clay County

Corey Kratcha
Wilkin County

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Schmidt**
Stevens County

Shelly Staebler
Traverse County

Lisa Tillotson
Clay County

Tyler Wirth
Douglas County

A vibrant, inclusive, and sustainable world starts here in
west central Minnesota.

1000 Western Avenue | P.O. Box 318 | Fergus Falls, MN 56538-0318 | wcif.org

