

**Warren/Alvarado/Oslo
Public School
Education Foundation**

2021 Annual Report

**WAO High School
Multi-Purpose Room**

**March 16, 2022
5:30 PM**

**Warren/Alvarado/Oslo Public School
Education Foundation
P.O. Box 125
Warren, MN 56762**

**218-745-4646 Ext. 1317
edfoundation@wao.k12.mn.us**

Board Members:

**Carol Anderson –Chairman
Melanie Nelson – Vice Chairman
Pam Jubie - Secretary
Carol Bowman – Treasurer
Carol Sedgeman
Darren Carlson
Duane Swanson
Ed Rosendahl
Russell Miller
Sally Roller (school board liaison)
Jordan Johnson (school board liaison)**

Mission Statement

The WAO Education Foundation Promotes the highest quality education in our communities through the enhancement of public school education programs, projects and activities; the establishment and awarding of post-secondary scholarships; and the creation of private support opportunities for public elementary and secondary education.

Vision Statement

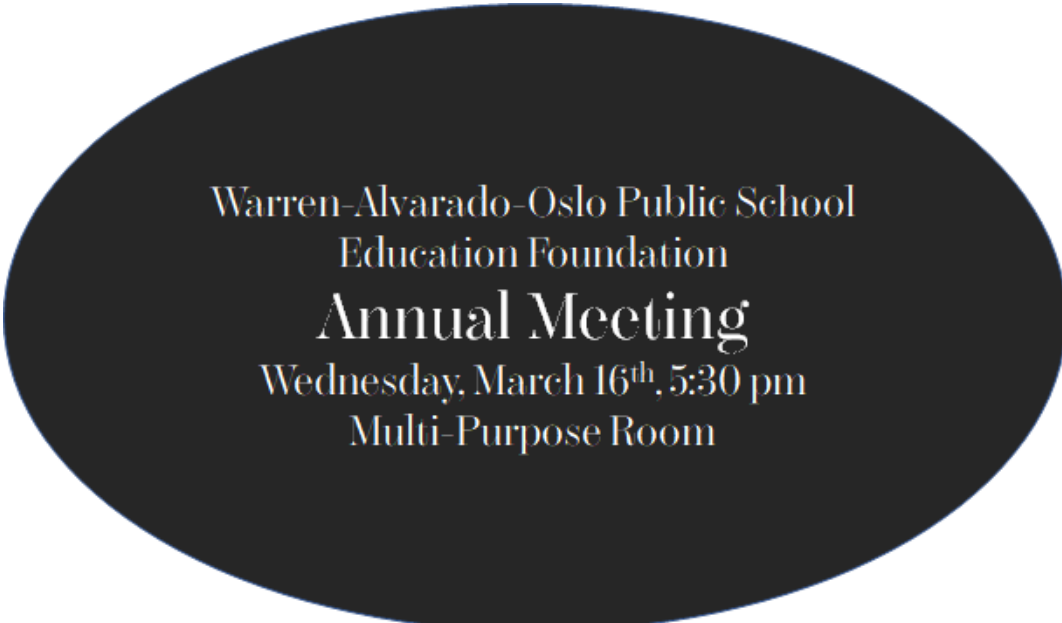
The Warren/Alvarado/Oslo Public School Education Foundation envisions community commitment to education which:

- *Unites the district, providing the highest quality educational program and opportunities**
- * Enhances the learning experience of our youth**
- *Recognizes and rewards the initiative of educators**
- * Encourages the post-secondary educational aspiration of young people**

Annual Meeting AGENDA

WAO Education Foundation

Call To Order	Melanie Nelson, Vice Chair
Read the Notice of the Annual Meeting	Pam Jubie, Secretary
2021 Financial Reports	Katie Holte, Phil Thompson and Associates
2021 Scholarship Recipients	Carol Bowman, Treasurer
2021 Classroom Purchases	Carol Bowman, Treasurer
Chairman's Report	
Committee Reports	
Fundraising	
Alumni	
Grants	
New Scholarships	
Call for a Motion to Adjourn	Melanie Nelson, Vice Chair
Presentations by Staff	Mary Stanislawski, Sp. Ed.



WARREN / ALVARADO / OSLO PUBLIC SCHOOL EDUCATION FOUNDATION

A Non-Profit Corporation
 Statement of Profit and Loss
 For the Years Ended December 31, 2020 and 2021

<u>REVENUE</u>	<u>2021</u>	<u>2020</u>	<u>Difference</u>	
Donations	15,885.30	13,523.02	2,362.28	
Designated Funds	35,995.00	31,440.00	4,555.00	
<u>Fund Raiser Income:</u>				
Golf Tournament	41,981.00	-	41,981.00	<i>(includes raffle)</i>
Misc Fundraisers	1,777.00	10,550.00	(8,773.00)	
Supper Fundraiser	-	-	-	
<u>Dividend/Interest Income:</u>				
Bremer Checking	13.64	13.87	(0.23)	
General Fund (Frandsen)	16,760.92	15,732.87	1,028.05	
Haugen Scholarship (Schwab)	21,720.35	17,212.41	4,507.94	
Capital Gains/Loss Realized	16,180.89	19,501.73	(3,320.84)	
Memberships	2,850.00	3,300.00	(450.00)	
Memorials	19,250.00	16,943.50	2,306.50	
Scholarships	110,305.30	104,230.00	6,075.30	
Tribute	320.00	1,302.50	(982.50)	
 Total REVENUE	 283,039.40	 233,749.90	 49,289.50	
 <u>EXPENSES</u>				
Advertising	1,592.04	1,100.00	492.04	
Board Meeting Expense	-	-	-	
Designated Funds Expense	8,787.53	10,123.68	(1,336.15)	
Donation Expense	-	-	-	
Donor Wall	966.85	142.98	823.87	
Investment Fees	7,460.46	5,914.45	1,546.01	
<u>Fund Raiser Expense:</u>				
Golf Tournament	8,787.99	-	8,787.99	
Misc Fundraisers	100.00	5,100.00	(5,000.00)	
Supper Fundraiser	-	-	-	
Needs Survey Expense	42,893.77	30,598.55	12,295.22	
Miscellaneous Expense	117.70	114.79	2.91	
Insurance	819.00	795.00	24.00	
Office Expense	3,793.61	2,514.79	1,278.82	
Postage	705.10	445.53	259.57	
Printing	10,150.00	10,150.00	-	
Scholarship Expense	51,800.00	47,800.00	4,000.00	
Professional Fees	2,700.00	2,490.00	210.00	
Director Fee Expense	1,200.00	1,200.00	-	
Office Wages/Payroll Tax	3,875.40	3,261.78	613.62	
 Total EXPENSES	 145,749.45	 121,751.55	 23,997.90	
 NET INCOME	 <u>137,289.95</u>	 <u>111,998.35</u>	 <u>25,291.60</u>	
 Capital Gains/Loss Unrealized	 <u>253,850.87</u>	 <u>97,677.53</u>	 <u>156,173.34</u>	

WARREN / ALVARADO / OSLO PUBLIC SCHOOL EDUCATION FOUNDATION
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BALANCE SHEETS
December 31, 2020 and 2021

	<u>2021</u>	<u>2020</u>	<u>Difference between 2020 and 2021</u>
<u>CURRENT ASSETS</u>			
Checking - Bremer	165,973.59	136,265.65	29,707.94
Checking - American Federal	1,007.76	819.90	187.86
Total Current Assets	166,981.35	137,085.55	29,895.80
<u>RESTRICTED ACCOUNTS</u>			
Charles Schwab Greg Haugen	1,189,470.87	939,274.04	250,196.83
Frandsen Bank & Trust (Scholarships)	1,036,073.71	924,997.97	111,075.74
Total Restricted Asssets	2,225,544.58	1,864,272.01	361,272.57
<u>TOTAL ASSETS</u>	2,392,525.93	2,001,357.56	391,168.37
<u>NET ASSETS</u>			
Unrestricted	166,981.35	137,085.55	29,895.80
Temporarily Restricted	-	-	-
Permanently Restricted	2,225,544.58	1,864,272.01	361,272.57
<u>TOTAL LIABILITIES & CAPITAL</u>	2,392,525.93	2,001,357.56	391,168.37

WARREN / ALVARADO / OSLO PUBLIC SCHOOL EDUCATION FOUNDATION
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NET INCOME COMPOSITION
December 31, 2020 and 2021

	<u>2021</u>	<u>2020</u>
Checking Account - Bremer	\$ 29,707.94	\$ (15,557.16)
Checking Account - American Federal	\$ 187.86	\$ 145.05
Frandsen Bank & Trust	\$ 111,075.74	\$ 176,300.30
Greg M. Haugen Fund - Schwab	\$ 250,196.83	\$ 48,819.79

Scholarships Awarded in 2021

Albert R. Chruszch Memorial Scholarship \$500: *Thomas Jones, Hunter Kasprowicz*

Alvarado Lions Club Scholarship \$600: *Erin Jubie*

Betty Melgard Scholarship \$500: *Courtney Nelson, Emily Pederson*

Bob Mattson & Dave Schroeder Scholarship \$500: *Spencer Wittman*

Chris Riopelle Memorial Scholarship \$300: *Hunter Kasprowicz*

Clifford & Richard Adrian Memorial Scholarship \$500: *Jakob Wurtzel*

Curt & Fay Kuznia Family Endowment Scholarship \$500: *Kylie Hanson*

David Joseph Haugen Memorial Scholarship \$500: *Thomas Jones*

David Judovsky Family Farm Scholarship \$1000: *Thomas Jones*

Dennis & Louise Brekke and Family Endowment \$1000: *Hunter Kasprowicz*

Don & Shirley Mager STEM Scholarship \$2000: *Emily Pederson, Jakob Wurtzel,
Spencer Wittman, Brooklyn Porter*

Edwin C Johnson Memorial Scholarship \$1000: *Hunter Kasprowicz*

Elizabeth A Porter Honorary Scholarship \$500: *Erin Jubie*

Fern Gilbert Memorial Scholarship \$1000: *Sarah Finseth*

Gary Schuler Endowment Scholarship \$1000: *Kylie Hanson, Emily Pederson*

Greg M Haugen Memorial Scholarship \$1000 (renewable): *Emily Pederson, Jakob Wurtzel,
Spencer Wittman, Lexi Anderson, Sophia Maruska*

Jeanne E Kotrba Memorial Scholarship \$2000: *Kylie Hanson, Hunter Kasprowicz,
Sarah Finseth, Lexi Anderson, Madeline Swanson, Sophia Maruska*

Jeff Evin Memorial Scholarship \$500: *Spencer Wittman*

Jumpstart Scholarship \$500: *Erin Jubie*

Justin "Huggie" Haugtvedt Memorial Scholarship \$500: *Madeline Swanson, Alise Juve*

Scholarships Awarded in 2021

Kenneth Poolman Memorial Scholarship \$500: *Thomas Jones*

Louie & Gertrude Kuznia Memorial Scholarship \$500: *Courtney Nelson*

Lowell B Goplin Scholarship (formerly Class of 1960) \$1000: *Alise Juve*

Lyle H Engelstad Scholarship \$2,000: *Emily Pederson, Lexi Anderson, Kylie Hanson, Brooklyn Porter*

Merrill & Mildred Stroble Memorial Scholarship \$1000: *Sarah Finseth, Lexi Anderson*

Morris & Ivy Maruska Memorial Scholarship \$1000: *Lexi Anderson*

Muriel Maruska / Roley Scholarship \$500: *Erin Jubie*

Myron & Margaret Carlson Scholarship \$1000: *Sarah Finseth*

Newell E Aas Memorial Scholarship \$250: *Spencer Wittman*

O.J. Peyton Memorial Scholarship \$250: *Sophia Maruska*

Paula Laudal Memorial Scholarship \$500: *Brooklyn Porter, Erin Jubie*

Percy Gilbert Memorial Scholarship \$1000: *Emily Pederson*

Richard P Nelson Memorial Scholarship \$1000: *Emily Pederson*

Robert L Strandberg Memorial Scholarship \$1000 (renewable): *Hunter Kasprovicz, Thomas Jones*

Scott E Forbes Memorial Scholarship \$400: *Hunter Kasprovicz*

Stefan Johnson Memorial Scholarship \$500: *Thomas Jones, Spencer Wittman*

Stuart Hurst Angel Award \$500: *Mary Rodriguez*

Tracy Chruszch Memorial Scholarship \$500: *Brooklyn Porter, Erin Jubie*

Vivian Olson Scholarship \$500: *Erin Jubie*

Warren Volunteer Ambulance Corps. Scholarship \$1000: *Brooklyn Porter*

WAO Ed Foundation Scholarships \$1000: *Erin Jubie, Brooklyn Porter, Sarah Finseth, Lexi Anderson, Emily Pederson, Kylie Hanson, Sophia Maruska, Madeline Swanson*

WAO Ed Foundation Scholarships \$2000: *Alise Juve, Courtney Nelson*

Scholarships Awarded in 2021

WHS Class of 1953 Scholarship \$1000: *Madeline Swanson*

WHS Class of 1957 Scholarship \$1000: *Lexi Anderson*

WHS Class of 1959 / Lyle Anderson Football Challenge Scholarship \$500: *Thomas Jones*

WHS Class of 1969 Scholarship \$500: *Courtney Nelson*

William G Porter Memorial Scholarship \$500: *Sarah Finseth*

\$99,300 Awarded in 2021 *(includes renewable funds)*

\$85,200 Paid out in January 2022 *(approx 86%)*

\$14,100 not paid (not in school / no info received and \$1250 not paid out until 2nd year)

2021 Need Requests

High School	Office/SpecEd	Kindness Cart	\$2,500.00
Elementary	5th Grade	Generation Genuis	\$350.00
Elementary	Kindergarten	Mobile Teaching Easel	\$493.35
Elem/HS	Speech/Language	Various Room Supplies	\$289.32
Elementary	Teacher	Classroom Rug	\$200.00
Elementary	Preschool	Outdoor Play Area	\$1,917.84
Elementary	2nd Grade	Educational Games/Indoor Recess Activities	\$916.92
Elementary	Reading	Early Intervention Decodable Readers	\$779.99
High School	Band	3 Baritones / Increase music library	\$4,025.00
High School	Math	Calculator Upgrade	\$2,749.26
High School	Special Ed	Learning Games Galore	\$250.45
High School	FACS	Health 9th Updated Info/DVDs	\$300.00
High School	Special Ed	Adapted Literacy Novel Units	\$386.10
High School	Yearbook/Business	"Say Cheese"	\$2,249.00
High School	Special Ed	Quiet Space in Classroom #52	\$2,096.97
High School	6th Grade	Book Study	\$558.21
High School	Principal	Positive Behavior	\$2,220.00
Elementary	Reading Specialist	Reading Intervention Cirriculum	\$526.31
High School	Library	Junior Library Guild	\$1,204.20
High School	Vocal Music	Intro to Guitar - music elective	\$1,390.00
Elementary	Kindergarten	Dramatic Play In K (Kitchen Sets)	\$3,722.55
Elementary	2nd Grade	Chapter Books	\$372.50
Elementary	3rd Grade	Classroom Books	\$250.00
High School	Vocal/Choir	Concert Clavinova	\$7,072.00
High School	Band	Update WAO Band Music Library	\$877.81
High School	Art	Pony Drone	\$388.00
High School		BOTS!	\$350.00
High School	Special Ed	Art Carts Restock	\$200.00
High School	Special Ed	Reading Extensions	\$407.40
High School	FACS	Child Dev & Culinary Arts Supplies	\$285.11
Elementary	1st Grade	Literacy Mentor Texts	\$3,789.15
Elementary	Reading Specialist	Guided Reading Book Collection	\$7,085.00
Elementary	Principal/SLP	Author Visit	\$1,700.00
Elementary	Special Ed	Reading Intervention Curriculum	\$700.00
Elementary	Office	Indoor Recess Options	\$281.00
Elementary	Kindergarten	Live Butterflies	\$150.98

\$32,999.31 paid out for needs in 2021 (may include previous years requests)

Many 2021 requests came out of several generous donations designated for classroom needs

2021 Designated Funds Paid

Anderson Endowment (Scholastic Books)	\$6696.00	Water & Snacks for Testing Day	\$500.00
Band	\$110.05	Auditory Enhancement	\$4160.00
Lunch Program	\$1002.78	New Teachers	\$2698.46
Kindergarten	\$733.99	Special Ed	\$150.71

CHAIRMAN'S REPORT

2021 started out as a questionable year for the Warren/Alvarado/Oslo Public School Education Foundation. Could we host our annual golf scramble? Would the Marshall County Fair happen? Would Covid-19 take over all of the activities for 2021? As plans for the fair developed we went ahead with our golf plans. Over the years we have gained more visibility in our communities through various avenues. Our alumni and friends are the greatest and support us in numerous ways. Thank you for your interest in the WAO Education Foundation!

The Marshall County Fair and our golf scramble were both very successful thanks to our many alumni and friends who were anxious to get back "home" during the summer. Some classes that had planned reunions for 2020 hosted them in 2021. We cleared over \$27,000 at the golf scramble. An added bonus to the weekend was the Alumni Jazz Band Concert that Charlie Roux organized. A crowd gathered on the Saturday afternoon of the fair for a great concert that also included the WAO Band under the direction of Molly Fridstrom. All proceeds from this event went to the WAO Band. Before and after the concert many alumni and friends toured through the school buildings. The words "remember when" prefaced many comments.

Our scholarship opportunities are more plentiful than ever! We are most proud to facilitate these scholarships and our WAO HS seniors are most fortunate to reap the benefits from them. The Betty Melgard Scholarship, the Stefan Johnson Memorial Scholarship and the Bob Mattson and Dave Schroeder Scholarship were presented for the first time in 2021. In addition, the Stuart Hurst Angel Award was established and presented for the first time.

The Class of 2021 had 46 scholarships valued at \$99,300 presented to them. Many of these scholarships are facilitated by the Foundation, but we also presented ten of our own. Many of these 46 scholarships have more than

one recipient. In addition, some second, third, and fourth year students each receive \$1,000 from the Greg M. Haugen Memorial Scholarship and the Robert L. Strandberg Memorial Scholarship to continue their education.

The generosity of our alumni and donors enabled the Foundation to approve \$49,051.30 of needs during 2021. Thank you for your part in making this happen. The WAO Staff is very appreciative of the items for their students and classrooms/departments.

We continue to send condolence letters to the families of deceased alumni, staff and "friends" of the Foundation. In 2021, 80 letters were mailed along with one of our brochures. Many of these generate a gift to the Foundation.

About a month after the passing of an alumni or "friend," a letter is mailed to the family members listing all of the names of people who gave memorials for their loved one. No amounts are listed, but if the memorial totals over \$100, we include information stating that their name will be placed on the monitor on our donor wall in the east entrance to the high school in memory of that person.

Again we continued to fund water and snacks for all students during state testing. We also welcomed new licensed, certified staff with a \$200 gift to purchase items for their classroom/subject area. In addition, each was presented with a \$50 gift certificate to the WAO Wearhouse to purchase Pony attire.

Over the past years we've funded the annual spelling bee for grades 5-8. The winner of the local contest advances to the regional contest.

This has been another school year of ups and down year for the school personnel and school board in dealing with Covid-19. We again showed our support to all employees and the Board of Education by providing \$10.00 gift certificates to each during American Education Week. These

were purchased at the three convenience stores in Warren. In addition, the "kindness cart" is funded by us as a "needs request," which provides a special treat for each employee at least once a month. We are most grateful to the wonderful WAO employees and school board for their devoted dedication to the district.

Gloria (Hedquist) Casey, WHS 1947, donated another "High Heels" quilt that we sold tickets on beginning at the Marshall County Fair and continued through December. Pauline Broten was the winner of this beautiful quilt. Over the years, Gloria has donated many quilts in various sizes that have brought in \$3,728 to the Foundation.

Alumni and friends are very good about sending in address updates to us. It makes it much easier for us, but the pile of undeliverable "Connections" still makes us dig and search to locate current addresses. Dori (Buck) Anvinson, OHS 1985, and Karyn (Nelson) Vasek, VNHS 1992, are my go-to people for updates for Oslo and Valley North names. Updates may be sent to us by mailing a note to P.O. Box 125, Warren, MN 56762, by calling us at 218-745-4646 EX. 1317 or via e-mail at edfoundation@wao.k12.mn.us.

Please keep in mind that any donation or memorial that is made to the Foundation can be designated to any scholarship or activity, grade/department by writing it on the memo line of your check or by attaching a note. All undesignated funds go into the general fund.

It takes many hands to keep things running smoothly. We are most fortunate to have the following people working with us: Heidi Thorstenson, the district technology coordinator, that keeps the Foundation link of the WAO website up-to-date. Tamara (Johnson) Oberg keeps our Facebook page going. Office Manager Carol Bowman does all of the computer work, receipts, and keeps our database up-to-date. She, along with Katie (Lund) Holte of Phil Thompson & Associates, keep all of our bookkeeping accurate. Administrators Kirk Thorstenson, Ben Miska, and Kelsey Johnson have been very supportive and are great to work with.

All of the things that we've accomplished during 2021 are because of our STRONG, WORKING, COMMITTED WAO EDUCATION FOUNDATION BOARD MEMBERS who have given so freely of their talents and time. They are Vice Chairman Melanie (Fulks) Nelson, Secretary Pam Jubie, Treasurer Carol Bowman, Directors Darren Carlson, Russell Miller, Ed Rosendahl, Carol Sedgeman, Duane (Dewey) Swanson and our school board liaisons Jordan Johnson and Sally Roller. They are the cream of the crop!

Thank you for believing and partnering with us during 2021. We look forward to continuing this partnership as we move forward with more expansion, growth, and involvement in 2022.

"WE CAN'T SUCCEED WITHOUT YOU!"

Carol J Anderson

Exhibit A

Committee Reports for 2021 Annual Meeting

Fundraisers

Golf Scramble – \$27,022.61 (net after expenses)

Yearbook Sales - \$10

Cookbooks - \$515

High Heels Quilt Raffle - \$1057

Amazon Smile - \$187.86

Cash Raffle - \$6,900 (net after payout & permit)

New Scholarships awarded in 2021

Betty Melgard Scholarship

Stuart Hurst Angel Award

Stefan Johnson Memorial Scholarship

Bob Mattson and Dave Schroeder Scholarship

Monthly Staff Payroll Deductions (Donations)

23 members of WAO Staff - \$7,013.24 general fund

1 member of WAO Staff - \$180.00 designated to Riopelle Scholarship

Annual Donations

One member - \$180/year (\$15/month) designated to Jeff Evin Scholarship

One member - \$120/year (\$10/month) general fund

One member - \$300/year (\$25/month) designated to band

One member - \$120/year (\$10/month) designated to Riopelle Scholarship

One member - \$800/year (\$100/month) designated to Brekke Scholarship (8 months in 2021)

Alumni Membership Levels

Educator (\$100 level): 759 (*up 22 from 2020*)

Mentor (\$500 level): 219 (*up 10 from 2020*)

Scholar (\$1,000 level): 230 (*up 10 from 2020*)

Benefactor (\$5,000 level): 72 (*up 8 from 2020*)

2021 General Membership: 114 (\$25 each totaling \$2,850)