

## 2024 Report of the Minnesota P.E.O. Home Fund Committee

The Minnesota P.E.O. Home Fund is a Minnesota project providing grants to elderly, disabled or infirm Minnesota residents needing financial assistance for the basics of life. During this past fiscal year, the Fund granted applicants for a total of \$160,762.98 (unaudited) to 51 grant recipients.

The Home Fund received income from chapter dues, donations, memorials, and honorariums from chapters, private donors and individual members. State chapter donations totaled \$40,711.61. The state chapter dues assessment generated \$5,132.00. A new private donor made a gift of \$25,000.00 and one estate continued with its annual gift of \$25,000. The Needham Family Trust donated \$5,000.00 and individual memorials to Billie Needham, PSP were \$710.00. Through such generous donors, the Home Fund board continues to approve grant requests without limitations on behalf of all Minnesota P.E.O. members. The Wells Fargo Private Banking practice manages the Home Fund financial portfolio, reporting to us in great detail at each June meeting.

The Home Fund Board of Trustees continues to encourage chapter members to identify people in need, assist them with the application process and endorse them via letters of recommendation. Board members and chapter sisters partner with social workers, non-profit agencies, religious groups, and health care organizations to spread the word about the Minnesota P.E.O. Home Fund. Through partnerships with the Multiple Sclerosis Society, Accend Social Worker Services, Transtech mobility equipment supplier, Fairview hospital social workers, religious congregations and others, we share the good news in Minnesota communities and the Home Fund's good work continues. Grants awarded met many essential needs including mobility equipment, home appliances, groceries, rent payments, funds for gasoline to attend appointments, utilities payments, accessibility equipment, hearing devices not covered by insurance, technology equipment, medical bills, fuel oil and household furnishings.

Most applicants reach out to the Home Fund as they have depleted financial resources, are experiencing long-term disabilities or chronic health conditions or have had devastating loss through fire, tornado or major injury. Many individuals and families live in need due to a lifechanging accident or illness. Several families experienced the death of the primary breadwinner impacting the entire family unit, creating lack of resources for children and other dependents. The Board routinely receives grant requests for mobility equipment and devices not covered by Medicare or health insurance. When approved, these recipients experience newfound freedom and independence. Life-changing narratives are recounted to the board through letters and photos from family members and support personnel.

The Minnesota P.E.O. Home Fund provides grants to Minnesota residents: men, women, children, P.E.O. and non-P.E.O. members. The Minnesota P.E.O. Home Fund webpage provides valuable resources for applicants, P.E.O. members, and vendors receiving our grant checks. It allows the Board to make application forms available to anyone at any time. Publicizing the quarterly meeting schedule, the application form and the guidelines for applying results in reduced calls and emails. Listing our State of Minnesota 69 non-profit status to confirm the

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Fund's legitimacy for retailers requiring validation has been helpful. The Board has partnered tirelessly to correct and verify reporting and memorials, honorariums and chapter or individual donations with Minnesota State Chapter as they experience support staff transitions.

Over the past year, board members have worked closely with the International Study and Research Committee to revise the Minnesota P.E.O. Home Fund bylaws to reflect updated structure and practice and to correct historic typographical errors. In addition, Bonnie Eernisse prepared and presented an informative tutorial for use as a guideline as chapters consider recommendation of applicants. Her presentation was highlighted through the Minnesota Executive Board sponsored April 2, 2024, Town Hall meeting.

Five P.E.O. members and two state officers served on the Minnesota P.E.O. Home Fund Board during 2023-2024:

- \* Jan Briones, PSP, Q, Montevideo, Chair
- \* Cathy Richardson, CU, Austin, Treasurer
- \* Bonnie Eernisse, DP, Burnsville, Secretary
- \* Nancy Danielson, EK, Minneapolis, Administrator
- \* Michelle Hizon, FP, Shakopee, Courtesy Secretary
- \* Jenn Lanthier, FR, Northfield, President MSC, ex-officio member
- \* Kris Peterson, CW St Paul, Vice President MSC, ex-officio member

The Board of Directors met quarterly to review applications, award grants, review the portfolio management, complete the annual audit, and conduct business. We also met to review/update the Home Fund application and guidelines as well as the Articles of Incorporation and Bylaws. Thank you for your financial contributions and for recommending applicants. Please continue to fund the life-changing work of the Minnesota P.E.O. Home Fund. Minnesota members are transforming lives, families, and communities for the better! The thank you notes we receive from recipients are heartwarming and filled with gratitude. Thank you for allowing the current board members the privilege to serve.

In Service to Minnesota P.E.O.,  
Jan Briones, PSP, Q  
2023-2024 Minnesota P.E.O. Home Fund Chairman