We work to power those on the front lines working for the good of our communities. In this work, we use these guiding principles and values as a strategy screen, as accountability markers, and as a handshake whether working with people coming through our doors for the first time or with longstanding Propel friends.

**Champion nonprofits**

We love nonprofits – their people and their missions. We are optimistic about their ability and believe in their power to change the world because we see their work in action every day. They are experts in connecting communities for change, bold leaders who take risks, and folks who stand up and take action in the face of injustice. Nonprofits are champions of good; we are champions of nonprofits.

**Serve as a mutual and trusted partner**

The work of standing up for your mission takes courage, honesty, and a friend who believes in you. We enter our partnerships with respect and kindness, aiming to be the champion in your corner, a trusted confidant, and the one helping identify the elephant in the room when an issue needs to be named. “Be helpful” is one of our mottos, and for us, this means listening first, then supporting nonprofit leaders’ expertise with our own. We value honesty with empathy, and usually around a table with coffee.

**Advance justice**

In an ever-changing world, we believe adaptability and creative problem solving come from always having one more question. We love to learn from each other and from our nonprofit partners, and from generosity share the insights and knowledge we’ve gained. Nonprofit leaders are experts at what they do, so we’re always building upon our own expertise in nonprofit finance, strategy, and governance to best support them through hard decisions, life cycle pivots, and ecosystem shifts.

**Stay curious**

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**Have fun**

We embrace joy and emit optimism. This means honoring mission moments, celebrating wins and brave decisions, equipping courageous leaders and standing by them, and bringing enthusiasm and a sense of humor to our relationships and work. We take the long view and surround ourselves with people and partnerships who make us smile and help us imagine the world we’re working toward.

**Vision**

A diverse network of mission-driven nonprofits building a healthy, vibrant, and more just community.

**Mission**

Fueling the impact and effectiveness of nonprofits, with guidance, expertise, and capital.

**Guiding Principles**

• Global Academy Enterprises woodworking for the People groundbreaking; Helen Fisk, executive director
• The People groundbreaking; Joy of Martin Ludden, executive director
• Tanka Fund
• The 2018 Finance & Top to Bottom:
  • Paul Babcock
  • Sony Malhotra
  • The Breazeale Group
  • Philanthropy Director, Andersen Foundation
  • Vice President, Wilder Center
  • Senior Counsel, Courtney Colby
  • Executive Director, Sarah Clyne,
  • Nilan Johnson Lewis
  • Shareholder & Firm President
  • The The American Leadership Forum
  • The American Leadership Foundation
  • TCF Financial
  • Thrivent
  • Ameriprise
  • Thivend
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**ACCOUNTING**

**Financial Sponsorship**
- 68 organizations financially sponsored by Propel Nonprofits
- $2.4 million granted to fiscally sponsored organizations

**FISCAL SPONSORSHIP**
- "Many finance-related was the one thing that always made me nervous about being an executive director. This Financial Leadership Cohort gave me financial skills, helped me build confidence at strategic level, and also gave me these relationships."
  - Mary Una, Executive Director, Giras on the Run Twin Cities

**LOAN PRODUCTS**
- Working capital
- Lines of credit
- Short-term facility projects
- Long-term facility projects

**STRATEGIC SERVICES**
- By project type
  - Nonprofit Infrastructure Grants program
    - Board Governance projects
    - Organizational Impact projects
    - Strategy Development projects
    - Leading Circles
    - Strategic Alliances

"It's so funny now, because people ask, 'Why hasn't I seen anything about your capital campaign?' I guess that's what you have to do without Propel. We still brought some cash to the deal, but nowhere close to 25 percent. It was amazing just to go from the deal is dead to Propel telling us, 'Hope, that's why we're here.'"
  - Amanda Lakenes, Executive Director, Tech Dups/Tech Discounts

"Others tend to say, 'you're high-risk, we don't know if you should use the do to that.' [Propel] doesn't just see organizations, they see the potential of organizations and help them the best way they can with the services they offer."
  - Johnny Allen, Executive Director, JK Movement

**TRAINING TOPICS**
- 173 Training Events & Cohorts in FY19:
  - 697 Webinars
  - 2265 Public trainings

"There are so many ways we can help nonprofits. They just need to see it as a partnership and there’s a lot of opportunities to work together with Propel Nonprofits."
  - Amanda Lakenes, Executive Director, Tech Dups/Tech Discounts

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  - Johnny Allen, Executive Director, JK Movement

**OUR FINANCIALS**
(As of April 1, 2018–March 31, 2019)
- Annual Operating Budget: $4.2 million
- Source of Operating Revenue: 67% contributed, 33% earned
- Total Loan Capital (as of 3.31.19): $32.3 million
- Loans Outstanding (as of 2.28.19): $30.4 million

**FINANCIAL SPONSORSHIP**
- 68 organizations financially sponsored by Propel Nonprofits
- $2.4 million granted to fiscally sponsored organizations

**FINANCIAL PARTNERS**
- 2018 Finance & Sustainability Conference<br>Top R: JK Movement, Bottom L: Kate Barr at the 2018 Finance & Sustainability Conference

"Our Financials are located on our website."

"It's so funny now, because people ask, 'Why haven't I seen anything about your capital campaign?' I guess that's what you have to do without Propel. We still brought some cash to the deal, but nowhere close to 25 percent. It was amazing just to go from 'the deal is dead' to Propel telling us, 'Hope, that's why we're here.'"
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**TRENDS VS. TOPICS**
- 2777 hours of technical assistance provided to 660 organizations

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**OUR MISSION SUPPORT**
We teach nonprofits that investing in infrastructure is savvy, prudent, and absolutely necessary. Each of our programs is built around, supported by, and shares responsibility for Core Mission Support. You can find a template to create your own Core Mission Support graphic on our website.
**** Core Mission Support

- Annual Operating Budget: $4.2 million
- Source of Operating Revenue: 67% contributed, 33% earned
- Total Loan Capital (as of 3.31.19): $32.3 million
- Loans Outstanding (as of 3.31.19): $30.4 million

Full financial information is located on our website.

# People Trained in FY19

<table>
<thead>
<tr>
<th>Training Topics</th>
<th>173 Training Events &amp; Cohorts in FY19:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- Management &amp; Leadership Development: 50 events, 836 attendees</td>
</tr>
<tr>
<td></td>
<td>- Strategic Alliances: 14 events, 106 attendees</td>
</tr>
<tr>
<td></td>
<td>- Technology &amp; Data: 11 events, 134 attendees</td>
</tr>
<tr>
<td></td>
<td>- Accounting &amp; Finance: 22 events, 233 attendees</td>
</tr>
</tbody>
</table>

$ Loans Originated by Field of Service

- Governance: $1,932,600
- Nonprofit Finance: $2,051,647
- Social Enterprise: $2,990,421
- Other: $4,538,995

Total Loans: $375,000

$2,901,280

# Strategic Services by Project Type

- Nonprofit Infrastructure (2177 hours of technical assistance provided to 640 organizations)
- Strategic Alliances (2177 hours of technical assistance provided to 640 organizations)
- Leadership Circles (2177 hours of technical assistance provided to 640 organizations)

** Technical Assistance**

- Networking events
- Conference presentations
- Workshops
- Public Speaking

**Fiscal Sponsorship**

- 68 organizations fiscally sponsored by Propel Nonprofits
- $2.4 million granted to fiscally sponsored organizations

**Financial Partners**

- Minnesota Foundation
- American Express Foundation
- P&G Foundation
- Ameriprise Financial
- F.R. Bigelow Foundation
- Bank of America
- American National Bank
- Alerus Financial
- Wells Fargo Foundation
- U.S. Bank Foundation
- TCF Foundation

**Investors**

- Target Foundation
- Synchrony Bank
- Surdna Foundation
- Saint Paul Foundation
- Otto Bremer Trust
- Northwest Area Foundation
- Minnesota Department of Employment and Economic Development (DEED)
- Northern Trust
- City of Minneapolis
- City of Minneapolis Neighborhood Revitalization Program
- CommunityWorks
- Deerwood Bank
- First Western Bank & Trust

**Loans Originated**

- Total Loans: $375,000
- Long-term facility projects: $10,725,000
- Short-term facility projects: $3,800,000
- Lines of credit: $1,000,000
- Working capital: $1,000,000

**$4.2 million**

- Minnesota Women’s Foundation of Minnesota
- Think Mutual Bank
- TCF Bank
- Synchrony Bank
- Treasury the U.S. Department of the Interior
- Small Business Loan Fund of the U.S. Department of the Treasury

**Full Service**

- Technical Assistance Helpline
- QuickBooks Online Set-up
- Creating Financial Insight
- Loans Outstanding

**Operational Expenses FY2019**

- Direct Expenses: $2,901,280
- Indirect Expenses: $3,599,421

**2018 Finance & Sustainability Conference**

- Networking events
- Conference presentations
- Workshops
- Public Speaking

**Technology**

- Tech Dump/Tech Discounts

**Strategic Services**

- Educational Services
- Transfer, Youth, and Human Services
- Arts & Culture
- Other Nonprofit

- Mary Uno, Executive Director, Girls on the Run Twin Cities

**“Anything finance-related was the one thing that always made me nervous about being an executive director. This Financial Leadership Cohort gave me financial skills, helped me build my confidence at a strategic level, and also gave me these relationships.”**

**“It’s so funny now, because people ask, ‘Why haven’t I seen anything about your capital campaign?’ I guess that’s what you have to do without Propel, we still brought some cash to the deal, but nowhere close to 25 percent. It was amazing just to go from ‘the deal is dead’ to Propel telling us, ‘Nope, that’s why we’re here.’”**

**“Families, Youth, & Human Services”**

**“Others tend to say ‘you’re high-risk, we don’t know if you should use the services they offer.’”**

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**Full Financial Information is located on our website.**
Training Topics

173 Training Events & Cohorts in FY19:
- Governance: 45%
- Nonprofit Finance: 42%
- Social Enterprise: 3%
- Strategy: 3%
- Other: 7%

$ Loans Originated by field of service
- Governance: $1,932,600
- Nonprofit Finance: $2,051,647
- Social Enterprise: $2,990,421
- Strategy: $4,538,995
- Other: $8,903,280

# People Trained in FY19

$375,000

Loan Products
- Working capital
- Lines of credit
- Short-term facility projects
- Long-term facility projects

# Strategic Services by project type

Accounting & Finance services: 51%
- QuickBooks Online set-up: 35%
- Technical Assistance Helpline: 4%
- QuickBooks Online training: 1%
- Creating Financial Insight: 1%

Fiscal Sponsorship
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Accounting & Finance services:
- Technical Assistance Helpline
- QuickBooks Online set-up
- Creating Financial Insight

FISCAL SPONSORSHIP
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ACCOUNTING
Accounting & Finance services:
- Technical Assistance Helpline
- QuickBooks Online set-up
- Creating Financial Insight

FINANCIAL PARTNERS
- Initiative Foundation
- The McGregor Foundation
- The MinnPost Foundation
- Medica Foundation
- U.S. Bank Foundation
- Wells Fargo Foundation
- U.S. Department of the Treasury CDFI Fund
- Otto Bremer Trust
- Thrivent Financial
- U.S. Bank Foundation
- The McKnight Foundation
- The Kresge Foundation
- Thrivent Financial
- U.S. Bank Foundation
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Champion nonprofits
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Be a mutual and trusted partner
The work of standing up for your mission takes courage, honesty, and a friend who believes in you. We enter our partnerships with respect and kindness, aiming to be the champion in your corner, a trusted confidant, and the one helping identify the elephant in the room when an issue needs to be named. “Be helpful” is one of our mottos, and for us, this means listening first, then supporting nonprofit leaders’ expertise with our own. We value honesty with empathy, and usually around a table with coffee.

Advance justice
We power nonprofits because they are helping create more just, equitable communities. Nonprofit leaders work beyond themselves to reshape systems that have historically withheld power, address the immediate gaps left by other institutions, and provide access to resources for all. We stand with them in a shared commitment to social, racial, and economic justice; as a community development financial institution, we collaborate to give nonprofits and their constituents access to capital, resources, and ownership of their decisions.

Stay curious
In an ever-changing world, we believe adaptability and creative problem solving come from always having one more question. We love to learn from each other and from our nonprofit partners, and then genuinely share the insights and knowledge we’ve gained. Nonprofit leaders are experts at what they do, so we’re always building upon our own expertise in nonprofit finance, strategy, and governance to best support them through hard decisions, life cycle pivots, and ecosystem shifts.

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MISSION
Fueling the impact and effectiveness of nonprofits with guidance, expertise, and capital

VISION
A diverse network of mission-driven nonprofits building healthy, vibrant, and more just communities

Propel Nonprofits powers the missions of other nonprofits. We believe nonprofits and their leaders, boards, staff, and volunteers are the real champions of good, our commitment to be a mutual and trusted partner because of the work they do. Our programs and services meet nonprofits at various points in their life cycles to enhance their impact by linking strategy, governance, and finance.

OUR NONPROFIT SERVICES
Accounting & Finance
Board Governance
Fiscal Sponsorship
Lending
Strategic Consulting
Skills & Knowledge Sharing

Strategic Consulting Training

BOARD OF DIRECTORS
Jean Adams
President & CEO, Programs & Strategy 
& Chief Operating Officer, The Minneapolis Foundation
Paul Balchuk
President & CEO, Community Development Foundation
Heidi Christianson
President & CEO, Arts Midwest
Sarah Cope, Secretary
Executive Director, Northside Futures League
Courtney Colby
Senior Vice President, Financial Analysis
Sean Kersten, Chair
President & CEO, United Way for Greater Minnesota
Brad Kraus
President & CEO, AFSCME Council 75, AFL-CIO
Scott Marquardt
President & CEO, The Nunn Financial Group
Sunny Malhotra
CEO, Propel Nonprofits
David Mitchell
CFO, Breazeale Group
Diane Tran
Vice President, Finance 
& Operations,
Breazeale Group
Scott Marquardt
President & CEO, The Nunn Financial Group

Sponsorship
Lending
Strategic Consulting
Skills & Knowledge Sharing

FY2019

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Marcus Owens
Executive Director, African American Leadership Forum
Patty Paniksk
Senior Vice President, Philanthropy, Minneapolis Foundation
Malia Rubalcaba Shulten
President, Barings Minneapolis
Gary Taven
Vice President, Nonprofit Alleviating Group, U.S. Banks
Bo Tho-Okuma
Co-founder & Managing Director of Asian American Leaders (CALS)
Elizabeth Toppik, Treasurer
Executive Director, Friends Fund of Communities, Wilder Foundation
Chief Financial Officer, Hyde Park Community Bank
Diane Tran
Senior Director, Community Engagement, Fairview Health Services

LEADERSHIP TEAM

Kate Barn
President & CEO
Keven Andrus
Vice President, Finance 
& CFO
Jawal Ogden-Braclett
Vice President & Chief Program Officer

SECRETARIES
Ameriprise
Thrivent
Wilder

TREASURERS
American Leadership Forum
Foundation for Communities & Services
Minneapolis Foundation

DIRECTORS
Board of Directors, Propel Nonprofits

Sarah Clyne, Nilan Johnson Lewis
Shareholder & Firm President
Scott Marquardt, Minneapolis Foundation
Paul Babcock, Minneapolis Foundation
Scott Marquardt, Minneapolis Foundation
Courtney Colby, Propel Nonprofits
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Our nonprofit services

Jen Adams
Senior Vice President, Strategy & Chief Operating Officer, The Minneapolis Foundation

Paul Babcock
President & Chief Financial Officer, Center for2/3

Heidi Christianson
Executive Director of Futurist International, Minneapolis

Sarah Coyne, Secretary
Executive Director, Northern Minnesota Urban League

Courtney Colby
Senior Managing, Thrivent Financial

Sean Kersten, Chair
Vice President - Finance & CFO, NorthSTAR, Virginia

Brad Krum
President, Oregon State Association of Community Banks

Scott Marquardt
President, Midwest Community Financial Services, Inc.

Sindy Malhosto
Vice President – Service & Sponsorship, AmTrust Financial Services, Inc.

David White
Chief Financial Officer, Brederick Group

Champion nonprofits

Jadah Levern
Executive Director, African American Leadership Forum

Patty Pannkuk
Senior Vice President, Thrivent Financial for Communities

Magal Rabinowitz Shulman
President, Bankers Trust

Gary Taverna
Life President, Minnesota Philanthropy Partnership Group, U.S. Banks

Bo Thorsen
Executive Director,American Bankers Association, National Association of State Banks (NASB)

Elizabeth Topolk, Treasurer
Executive Director, Friends of the Swedish American Heart Institute, Chicago

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In an ever-changing world, we believe adaptability and creative problem solving come from always having one more question. We love to learn from each other and from our nonprofit partners, and then generically share the insights and knowledge we’ve gained. nonprofit leaders are experts at what they do, so we’re always building upon our own expertise in nonprofit finance, strategy, and governance to best support them through hard decisions, life cycle pivots, and ecosystem shifts.

We embrace joy and aim to optimize. This means honoring mission moments, celebrating wins and brave decisions, equipping courageous leaders and standing by them, and bringing enthusiasm and a sense of humor to our relationships and work. We take the long view and surround ourselves with people and partnerships who make us smile and help us imagine the world we’re working toward.

We love nonprofits—both people and their missions. We are optimistic about their ability and believe in their power to change the world because we see their work in action every day. They are experts at connecting communities for change, bold leaders who take risks, and folks who stand up and take action in the face of systems. nonprofits are champions of good; we are champions of nonprofits.

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