

Engage Winona

CONTENTS

EIN: 82-2726124
Report Generated on: 11/18/2025

Executive Summary	2
Programs & Results	4
Financial Review	7
Operations & Leadership	9

APPENDIX

Key Documents	18
Charity Check Report	19

Engage Winona

 Winona, MN

 <http://www.engagewinona.org>

 (507)312-

 [View GuideStar Profile](#)



MISSION Engage Winona strengthens communities by reigniting community participation through dialogue, support, and training.	EIN 82-2726124	EXECUTIVE DIRECTOR Marcia Ratliff
	RULING YEAR 2018	BOARD CHAIR Kevin McGree
	IRS SUBSECTION 501(c)(3) Public Charity	SUBJECT AREA Humanities Community improvement
	FOUNDING YEAR 2016	NTEE Code Community, Neighborhood Development, Improvement (S20)
	MAIN ADDRESS 119 E 3rd St Winona, MN 55987-3417	
	AFFILIATION TYPE Independent Organization	
	CONTACT Marcia Ratliff, Executive Director () 507-312-engage@engagewinona.org	

PROGRAMS

1. Winona Area Kitchen Table

Population(s) served:

2. Lived Experience Leaders

Population(s) served:Ethnic and racial groups

3. Engagement is for Everyone!

Population(s) served:

POPULATIONS SERVED

1. Economically disadvantaged people

2. Children and youth

3. Ethnic and racial groups

COMPLIANCE

- ✓

IRS Pub 78 Verified as of November 2025
- ✓

IRS BMF 509(a) (1) as of November 14, 2025
- ✗

A-133 Audit Required/Performed?
- ✓

Conflict of Interest Policy
- ✓

Written whistleblower policy

Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)

TRANSPARENCY MEASURES

- ✓

Board Practices Reported?
- ✓

Diversity Data Reported?
- 0

Number of Independent Board Members

Programs & Results

PROGRAMS

Source: Self-Reported by Organization, June 2025

Winona Area Kitchen Table

Population(s) Served: n/a

We know many people in the Winona area struggle to find safe, affordable housing. The Winona Kitchen Table is an initiative to advance solutions to the housing crisis in Winona and across the state of Minnesota. The Winona Area Kitchen Table is a cohort of local community members who have faced housing instability or homelessness. The team brings their own lived experience and invites cross-sector stakeholders to work together on solutions to housing issues that will truly work in our community.

Lived Experience Leaders

Population(s) Served: n/a

Lived Experience Leaders trains, supports and resources the community leadership and changemaking ideas of diverse residents whose lived experiences have given them powerful expertise to create equitable change. We welcomed our inaugural cohort in fall 2020 of 11 participants and 7 facilitator-participants – a large majority folks of color and women, multigenerational with ages ranging from early 20s to late 60s, with lived experiences in poverty, race, culture, gender, age, and more. Participants work collaboratively in an immersive experience over the first three months on individual and inner work, to own their innate leadership and value and lived expertise, and unlock inner skills and capacities. They then work on community change projects while developing changemaking, organizing and advocacy skills over the next three to four months, with support from the community, relatable mentors, and program staff.

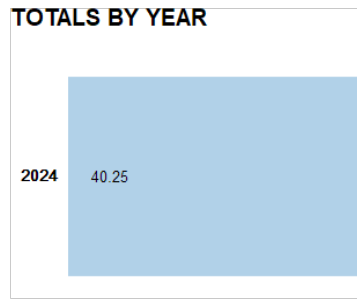
Engagement is for Everyone!

Population(s) Served: n/a

Have a great idea to change Winona, but don't know where to start? Looking to get connected to the community or to a cause you're passionate about, but don't know how or don't feel included? Engage Winona's Engagement for Everyone! workshops are here to help. The series of accessible workshops are designed help everyone in Winona — no matter their background, level of experience, or time commitment — discover how to get engaged in the community and turn their ideas to improve Winona into reality. We have offered these workshops in more than a dozen accessible and public locations across Winona. These workshops are available by request: Companies and institutions looking for fun ways to help their employees get engaged can receive a workshop for a donation, and all workshops are offered for free to organizations that serve marginalized populations in the Winona area.

RESULTS

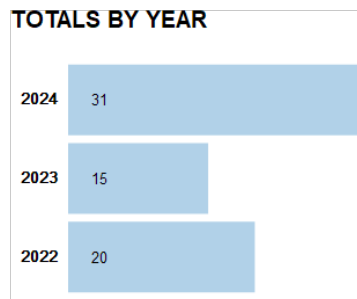
Technical assistance hours



Population(s) Served: No target populations selected

Related program: Lived Experience Leaders

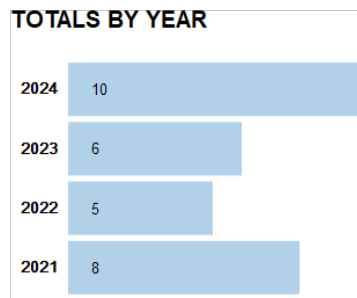
Number of public events held to further mission



Population(s) Served: No target populations selected

Related program:

Number of training workshops

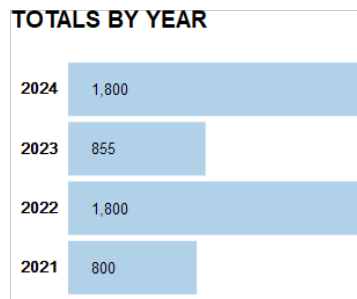


Population(s) Served: No target populations selected

Related program: Lived Experience Leaders

Notes: This includes workshops that were open to the public and cohort-only workshops.

Number of participants attending course/session/workshop



Population(s) Served: No target populations selected

Related program:

Notes: These totals reflect total attendance at public events and facilitated program meetings. Totals do not include social media group members or board and committee meeting attendance.

CHARTING IMPACT

What is the organization aiming to accomplish?

We seek to:

Increase access to civic and community organizations by creating opportunities to get the full community involved.

Center the voices of community members in defining next steps.

Increase the ability of individuals and organizations in our community to tackle big problems, work across sectors, and maximize their collective impact.

Nurture the connections and relationships that move the work forward.

What are the organization's key strategies for making this happen?

On a day to day basis, we:

Partner with governments and organizations to create new pathways for community involvement

Work with community members to solve persistent issues

Facilitate workgroups to drive convergent solutions that work for everybody

Provide training, workshops, and resources for people with lived experience and anyone looking to level up their community work

Host fun, all-ages events that reduce barriers to participation and build relationships

What have and haven't they accomplished so far?

Since 2017, Engage Winona has grown from 1 staff member to 4. We've developed new programs and tools in response to community needs, with a core focus being investing in people with lived experience of social and economic barriers, from discrimination to poverty.

Our two core programs include:

Lived Experience Leaders, a cohort program that provides training and resources to amplify voices and support changemaking ideas of folks across Winona whose diverse lived experiences have given them unique and powerful expertise to create equitable change for Winona.

and

Winona Area Kitchen Table, a program that invites people with lived experience of housing instability to vision and advocate for positive change. This program is part of a statewide initiative focused on preventing housing crises and eliminating racial and rural disparities. The initiative is designed to shift power to those who have historically been harmed, and to create support structures that will help people before they experience a housing crisis. Were working closely with regional cohorts in Duluth and Minneapolis.

Program objectives include:

- building relationships between people with lived experience and key stakeholders,
- collective visioning and design of actionable solutions, and
- motivating support for tangible change in both policy and practice that advances housing justice.

Financials

FISCAL YEAR START: 01/01

FISCAL YEAR END: 12/31

Financial Trends Analysis

Business Model Indicators

Created in Partnership with



Profitability	2023	2024
Unrestricted surplus (deficit) before depreciation	\$35,555	-\$511
As a % of expenses	13.7%	-0.1%
Unrestricted surplus (deficit) after depreciation	\$35,555	-\$511
As a % of expenses	13.7%	-0.1%

Revenue Composition		
Total revenue (unrestricted & restricted)	\$319,880	\$404,673
Total revenue, % change over prior year	0.0%	26.5%
Program services revenue	8.8%	8.3%
Membership dues	0.0%	0.0%
Investment income	0.2%	0.5%
Government grants	7.8%	0.0%
All other grants and contributions	83.2%	91.2%
Other revenue	0.0%	0.0%

Expense Composition		
Total expenses before depreciation	\$259,325	\$368,934
Total expenses, % change over prior year	0.0%	42.3%
Personnel	61.5%	51.7%
Professional Fees	0.5%	1.8%
Occupancy	4.5%	4.9%
Interest	0.0%	0.0%
Pass-Through	0.0%	0.0%
All other expenses	33.5%	41.6%

Financial Trends Analysis, continued

Moving Toward Full Cost Coverage

Full Cost Components (estimated)	2023	2024
Total Expenses (after depreciation)	\$259,325	\$368,934
One Month of Savings	\$21,610	\$30,745
Debt Principal Repayment	\$0	\$0
Fixed Asset Additions	\$0	\$0
Total Full Costs (estimated)	\$280,935	\$399,679

Capital Structure Indicators

Liquidity		
Months of cash	8.6	7.1
Months of cash and investments	8.6	7.1
Months of estimated liquid unrestricted net assets	7.2	5.1
Balance Sheet Composition		
Cash	\$185,029	\$219,802
Investments	\$0	\$0
Receivables	\$0	\$0
Gross land, buildings, and equipment (LBE)	\$0	\$0
Accumulated depreciation (% of LBE)	0.0%	0.0%
Liabilities (as % of assets)	2.2%	1.4%
Unrestricted net assets	\$155,883	\$155,372
Temporarily restricted net assets	N/A	N/A
Permanently restricted net assets	N/A	N/A
Total restricted net assets	\$25,000	\$61,250
Total net assets	\$180,883	\$216,622

Key Data Checks

Material Data Errors	2023	2024
	No	No

Note: This issue is relevant to a small number of organizations: The nonprofit subject(s) of this report may have affiliates. The Form 990 data may not include information about any or all potential affiliates. If an organization does have affiliates and these affiliates have substantial financial activity, the financial data in this report may not present a comprehensive picture of the nonprofit's financial condition. Please consult the 990s of any potentially related affiliates for additional information.

- ☒ [Formulas for key metrics](#)
- ☒ ['Key Revenue & Expense Data from Form 990'](#)
- ☒ ['Key Balance Sheet Data from Form 990'](#)

Operations

Source: Self-Reported by Organization, June 2025

EXECUTIVE DIRECTOR

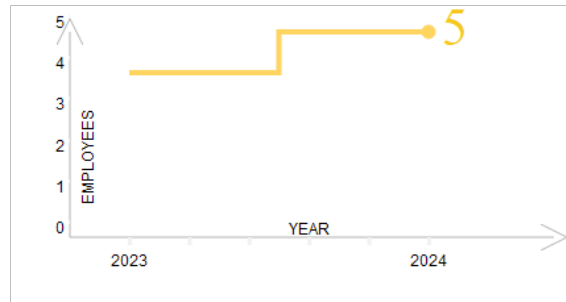
Marcia Ratliff

[LinkedIn profile](#)

I'm a writer, poet, and creative thinker with experience in community engagement, communications, and youth development. I'm passionate about facilitating vibrant conversations, including diverse voices, and strengthening rural communities. Returned Peace Corps Volunteer, South Africa, 2016-2018.

NUMBER OF EMPLOYEES

Source: IRS Form 990



BOARD CHAIR

Kevin McGree

Term: 2023 -

BOARD MEMBERS

- Alexa Shapiro
Winona Outdoor Collaborative
- Brittney Theuer
- Danya Espinosa
- Erica Ericksen
Gundersen Health
- Jackson Ramsland
- Jay Palmer
Winona State University
- Kevin McGree
- Laurie Krause
- Marcia Ratliff
- Randy Skarlupka
Miller Ingenuity
- Sierra Verdin

OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2024

Name	Title	Compensation	Other	Related
Marcia Ratliff	Executive Director	\$68,000	\$0	\$0
Jackson Ramsland	Director	\$0	\$0	\$0
Laurie Krause	Director	\$0	\$0	\$0
Jackie Henderson	Director	\$0	\$0	\$0
Aurea Osgood	Director	\$0	\$0	\$0
Jay Palmer	Director	\$0	\$0	\$0
Randy Skarlupka	President	\$0	\$0	\$0
Erica Ericksen	Treasurer	\$0	\$0	\$0
Alexa Shapiro	Secretary	\$0	\$0	\$0
Kevin McGree	Vice President	\$0	\$0	\$0

OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2023

Name	Title	Compensation	Other	Related
Marcia Ratliff	Executive Director	\$64,000	\$0	\$0
Jackson Ramsland	Director	\$0	\$0	\$0
Laurie Krause	Director	\$0	\$0	\$0
Cynthia Knouft	Director	\$0	\$0	\$0
Ethan Wilkins	Director	\$0	\$0	\$0
Aurea Osgood	Director	\$0	\$0	\$0
Randy Skarlupka	President	\$0	\$0	\$0
Erica Ericksen	Treasurer	\$0	\$0	\$0
Alexa Shapiro	Secretary	\$0	\$0	\$0
Kevin McGree	Vice President	\$0	\$0	\$0

Officers Directors, Trustees, Key Employees

FISCAL YEAR 2022

Name	Title	Compensation	Benefits/Deferred Compensation	Expense Account, Other
Marcia Ratliff	Executive Director	\$63,000	\$0	\$0
Josiah Litant	President	\$0	\$0	\$0
Aurea Osgood	Interim President/Secretary	\$0	\$0	\$0
Erica Ericksen	Treasurer	\$0	\$0	\$0
Andy Bauer	Director	\$0	\$0	\$0
Chad Dull	Director	\$0	\$0	\$0
Amy Hermodson	Director	\$0	\$0	\$0
Andrew Althoff	Vice President	\$0	\$0	\$0
Joe Tadie	Director	\$0	\$0	\$0
Alexa Shapiro	Director	\$0	\$0	\$0
Jackson Ramsland	Director	\$0	\$0	\$0
Laurie Krause	Director	\$0	\$0	\$0
Cynthia Knouft	Director	\$0	\$0	\$0
Randy Skarlupka	Director	\$0	\$0	\$0

Officers Directors, Trustees, Key Employees

FISCAL YEAR 2021

Name	Title	Compensation	Benefits/Deferred Compensation	Expense Account, Other
Brian Voerding	Executive Director	\$27,275	\$0	\$0
Marcia Ratliff	Executive Director	\$15,000	\$0	\$0
Mollee Sheehan	Director	\$1,500	\$0	\$0
Josiah Litant	President	\$0	\$0	\$0
Aurea Osgood	Vice President	\$0	\$0	\$0
Erica Ericksen	Treasurer	\$0	\$0	\$0
Andy Bauer	Director	\$0	\$0	\$0
Chad Dull	Director	\$0	\$0	\$0
Amy Hermodson	Director	\$0	\$0	\$0
Sara Pohlschneider	Secretary	\$0	\$0	\$0
Andrew Althoff	Director	\$0	\$0	\$0
Chris Callahan	Director	\$0	\$0	\$0
Joe Tadie	Director	\$0	\$0	\$0
Ed Hoffman	Director	\$0	\$0	\$0
Dawn Lippman	Director	\$0	\$0	\$0

Officers Directors, Trustees, Key Employees

FISCAL YEAR 2020

Name	Title	Compensation	Benefits/Deferred Compensation	Expense Account, Other
Brian Voerding	Executive Director	\$50,999	\$1,450	\$0
Josiah Litant	President	\$0	\$0	\$0
Aurea Osgood	Vice President	\$0	\$0	\$0
Mollee Sheehan	Secretary	\$0	\$0	\$0
Chris Callahan	Treasurer	\$0	\$0	\$0
Amy Hermodson	Director	\$0	\$0	\$0
Ed Hoffman	Director	\$0	\$0	\$0
Joe Tadie	Director	\$0	\$0	\$0
Denise McDowell	Director	\$0	\$0	\$0
Randy Schenkat	Director	\$0	\$0	\$0
Janneke Sobeck	Director	\$0	\$0	\$0

Paid Preparers
FISCAL YEAR 2024

Firm Name	Firm EIN	Firm Address	Firm Phone
Rick Carlson CPA	20-5898212	902 E 2nd St Suite 202, Winona MN 55987 USA	507-474-5280

Paid Preparers
FISCAL YEAR 2023

Firm Name	Firm EIN	Firm Address	Firm Phone
Rick Carlson CPA	20-5898212	902 E 2nd St Suite 202, Winona MN 55987 USA	507-474-5280

Paid Preparers
FISCAL YEAR 2022

Firm Name	Firm EIN	Firm Address	Firm Phone
Rick Carlson CPA	205898212	902 E 2nd St Suite 202, Winona MN 55987	5074745280

BOARD LEADERSHIP PRACTICES

GuideStar worked with BoardSource, the national leader in nonprofit board leadership and governance, to create this section, which enables organizations and donors to transparently share information about essential board leadership practices.

BOARD ORIENTATION & EDUCATION

Does the board conduct a formal orientation for new board members and require all board members to sign a written agreement regarding their roles, responsibilities, and expectations?

yes

CEO OVERSIGHT

Has the board conducted a formal, written assessment of the chief executive within the past year?

yes

ETHICS & TRANSPARENCY

Have the board and senior staff reviewed the conflict-of-interest policy and completed and signed disclosure statements in the past year?

yes

BOARD COMPOSITION

Does the board ensure an inclusive board member recruitment process that results in diversity of thought and leadership?

yes

BOARD PERFORMANCE

Has the board conducted a formal, written self-assessment of its performance within the past three years?

yes

Organizational Demographics

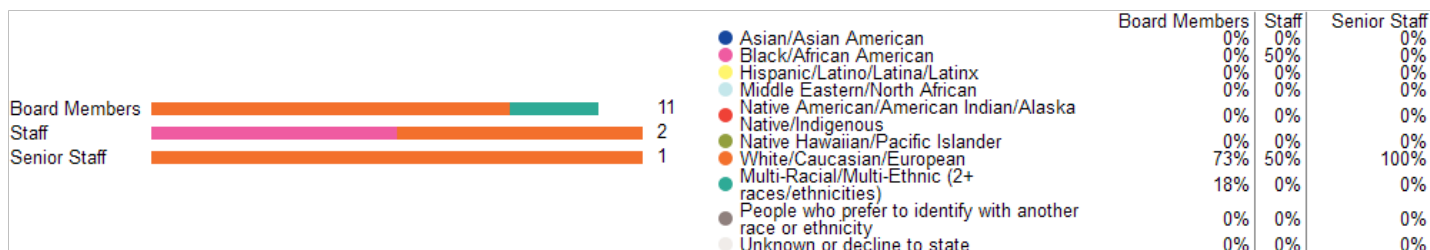
Who works and leads organizations that serve our diverse communities? This organization has voluntarily shared information to answer this important question and to support sector-wide learning. GuideStar partnered on this section with CHANGE Philanthropy.

Leadership

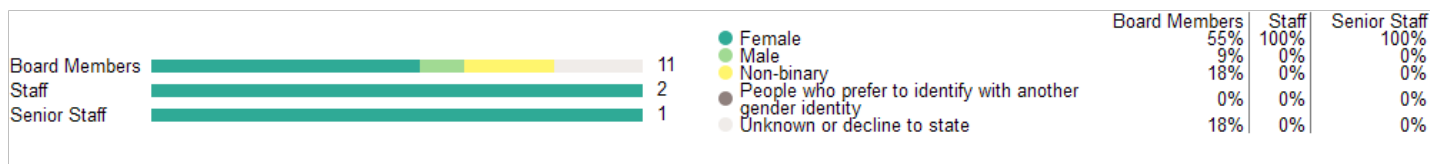
The organization's leader identifies as:

Race & Ethnicity	White/Caucasian/European
Gender Identity	Female, Not transgender
Sexual Orientation	Decline to state
Disability Status	Person without a disability

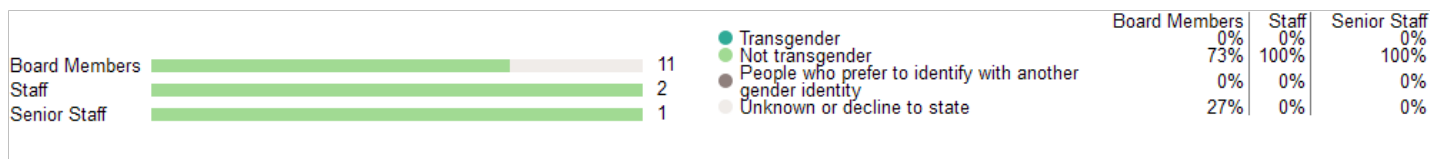
Race & Ethnicity



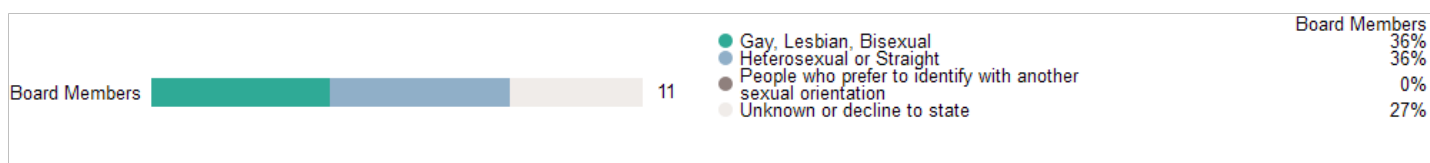
Gender Identity



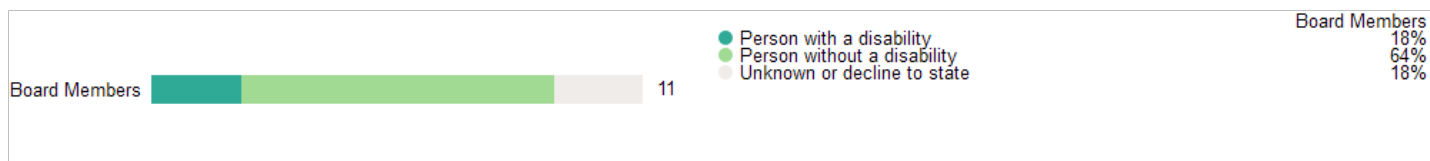
Transgender Identity



Sexual Orientation



Disability



We do not display staff or senior staff disability information for organizations with fewer than 15 staff.

Appendix

Key Documents

IRS Forms 990	2024 990
	2023 990
	2022 990
	2021 990
	2020 990
IRS Forms 990T	Not Available
Audited Financial Statements	Not Available
Key Organization Documents	Letter of Determination
	2022 Annual Report
	'Key Revenue & Expense Data from Form 990'
	'Key Balance Sheet Data from Form 990'

Engage Winona

119 E 3rd St
Winona, MN 55987-3417

✓ Foundation Status Code: PC*

✓ Public charity described in section 509(a)(1) or (2)

IRS Publication 78 Details

IRS Pub 78 verified

Organization name	Location	Most recent IRS Publication 78
Engage Winona	Winona, MN	September 2025
EIN	Deductibility status description	Verified with most recent Internal Revenue Bulletin
82-2726124	A public charity (50% deductibility limitation).	November 17, 2025

IRS Business Master File Details

IRS BMF509(a)(1)

Organization name	Most recent IRS BMF	Reason for Non-Private Foundation Status
ENGAGE WINONA	September 09 2025	Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)
EIN	IRS subsection	Ruling date
82-2726124	This organization is a <u>501(c)(3) Public Charity</u>	02/2018
Foundation Code	Foundation Code Description	
15	Organization which receives a substantial part of its support from a governmental unit or the general public	
This organization was not included in the Office of Foreign Assets Control Specially Designated Nationals (SDN) list.		

On September 8, 2011, the IRS issued [regulations](#) which eliminated the advance ruling process for a section 501(c)(3) organization. [Learn more](#)

* The Foundation Status Code is the code that foundations are required to provide for each grantee annually on part XV of Form 990PF. Note that this code cannot be derived in some cases (e.g., supporting organizations for which 'type' can't be determined).

[IRS Revenue Procedure 2011-33](#) allows grantors to rely on third-party resources, such as GuideStar Charity Check, to obtain required Business Master File (BMF) data concerning a potential grantee's public charity classification under section 509 (a) (1), (2) or (3).

GuideStar Charity Check Data Sources

- GuideStar acquires all IRS data directly from the Internal Revenue Service.

-[IRS Publication 78 \(Cumulative List of Organizations\)](#) lists organizations that have been recognized by the Internal Revenue Service as eligible to receive tax-deductible contributions.

-The [IRS Internal Revenue Bulletin](#) (IRB) lists changes in charitable status since the last Publication 78 release. Between the release of IRS Publication 78 and the subsequent IRS Internal Revenue Bulletin, the IRB date will reflect the most recent release date of IRS Publication 78.

-The [IRS Business Master File](#) lists approximately 1.7 million nonprofits registered with the IRS as tax-exempt organizations.
- The [IRS Automatic Revocation of Exemption List](#) contains organizations that have had their federal tax-exempt status automatically revoked for failing to file an annual return or notice with the IRS for three consecutive years.

-The Foundation Status Code is a value derived by mapping the codes found on the [990PF filing instructions](#) to the corresponding codes in the IRS BMF. Note that not all codes are able to be mapped due to insufficient data.

-The Office of Foreign Assets Control (OFAC) [Specially Designated Nationals \(SDN\) list](#) organizations that are owned or controlled by targeted individuals, groups, and entities, such as terrorists or narcotics traffickers. Their assets are blocked and U.S. persons are generally prohibited from dealing with them.