Connecting Donors to Community Needs

Perhaps the most unique and important role that the MCF plays is as a strategic and charitable giving partner to donors. It’s through our donors and funds that the MCF is able to make the largest impact in the dollars and the value that is added to our community. This year the MCF granted over $300,000 to programs and organizations like Sharing Ministries, Christ’s Kitchen, Cat’s Corner and The Stage, Montrose Recreation Foundation, Trout Unlimited-Gunnison Gorge Anglers, Community Options, Montrose Olathe Adaptive Sports Program, Montrose High School STEM project, Dr. Vader’s Helping Hand Fund, and many, many more. A few of these grants for current capital campaigns were $10,000 to $50,000. Scholarships

Through scholarship funds that have been established with the Foundation, the MCF was able to award almost $40,000 to students from Montrose and surrounding areas. As a scholarship administrator, the MCF promotes scholarships, accepts applications, reviews applications with a scholarship committee, and grants scholarship monies to deserving students that the committees feel best meet the specific scholarship criteria. One of our new scholarship funds was established through a partnership with Montrose County. The Tom Gilmore Memorial Law Enforcement Scholarship will provide tuition assistance to Montrose County residents who are attending the Law Enforcement Academy at Delta-Montrose Technical College. When gifts are made to the MCF Community Endowment Fund, we use the income earned from that fund to put the dollars back into the community. In July of 2016 we granted $10,000 to Hope West Kids Programs and because it was a matching grant, helped to raise a total of $20,000 for these important and often life-saving services. We also distributed some $3,000 in Immediate Needs grants to the West End of Montrose County and the Ouray Library. Our grant cycle for 2016-2017 closes November 30th and we hope to award grants in January to local organizations with qualifying applications for programs in the areas of education or recreation. MCF presented a check for $50,000 from an MCF donor to the Montrose Recreation District to aid in their capital campaign. more on page 3

The MFC facilitated the giving of over $300,000 dollars into our community to local nonprofits. Grants were given from MCF grant funds and immediate needs grants, and through scholarship, donor advised, endowment, component/agency and fiscal sponsorships funds. The MCF administered $38,000 in scholarship and tuition assistance to deserving students at all ages in the community. These students were attending colleges and universities across the U.S. as well as enrolled in vocational courses in Delta and Montrose Counties.

Local philanthropists established several funds with the MCF in Fiscal Year 2015-2016 which helped MCF assets grow to $3.2 million, this is a 33% increase over the prior Fiscal Year. Since 2011, the MCF have more than doubled.

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Eight new funds were established in 2015-2016.

There are now 58 charitable funds in the MCF Family of Funds.

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The Montrose Community Foundation’s mission states that we strive to “serve as a neutral convener to enable community members to address needs and issues.” Reflecting back and looking forward on Foundation activities, I’ve learned how critical of a role our foundation can play as a local and regional collaborator.

In early January the Foundation began meeting with citizens to address civility in Montrose and the Montrose Civility Project was created. In the last few months, the Foundation has been working with the Montrose Coalition on the Homelessness in hopes of finding a solution for housing our homeless during the cold, winter months. The Montrose Community Foundation and the Western Colorado Community Foundation have convened organizations that provide scholarships. In 2016 the MCF granted education and turned dreams into reality for kids and community grants.

The MCF was fortunate to be able to work with two interns, Ashley Smith (Class of 2016) and Christina Terrazas (Class of 2016) from the Montrose High School Career Opportunities Services program. These seniors helped out at the Foundation for about 10 hours per week working on projects including updating website and social media posts, marketing, mailings for the Foundation, event preparation including sponsor relationships and other special projects like Coats for Kids and community grants.

RECREATION

Many of us have been tracking the progress on the new Montrose Recreation Center with excitement and interest! This important project would not be possible without the fundraising efforts of the Montrose Recreation Foundation (MRF). Early in 2016 the MRF committed some great funding through a local developer who pledged $50,000 to the MRF if the Center could be matched and raised an additional $50,000. The MRF rose to the challenge and a local developer agreed and the MRF reached their goal of $50,000 by the end of the summer.

The theme for the conference will be “Elevating Leadership and Collaboration” which fits beautifully into what we are striving to achieve.

AGENCY ENDOWMENT FUNDS

Through Agency Endowment Funds, the MCF provides a way for local organizations to invest in their futures while building a stable funding stream. Agency Endowment Funds protect endowed income for the future, provide income, help demonstrate to donors a commitment to long-range financial planning and provide a way for donors to give complex gifts — stocks, life insurance, and bequests.

The following organizations have Agency Endowment Funds with the MCF:

- A+BC (Academic Booster Club) Endowment
- Breast Cancer Awareness Endowment
- Habitat for Humanity Endowment
- HopeWell Endowment
- MCF Community Endowment
- Magic Circle Players Endowment
- Montrose Botanical Society Endowment
- Permanent Book Fund Endowment
- United Methodist Church Endowment

The Foundation’s invested funds are managed internally in a conservative manner by an Investment Policy Committee that adheres to an approximate 60/40 balance between stocks and bonds. By using only very low-cost index mutual funds and exchange-traded funds, the Foundation does not incur high investment fees or pass along high fees to fund stakeholders.

PLAN YOUR LEGACY

The Spruce Society acknowledges donors’ commitment to the future—today. Individuals who choose to include the MCF in their estate plan either by will designation or through a charitable gift annuity, not only make a charitable gift, enjoy tax benefits but are also eligible for membership in The Spruce Society. The income and earnings generated from these funds are returned into the community as grants. If you would like to give gifts to any of these funds, please contact the MCF. We welcome the opportunity to discuss gifts of stock, bequests, estate gifts, life insurance and real estate. These gifts are vital to the future of our community.

The MCF has set up endowment funds to help ensure our needs and interests to protect our future will be served for generations to come:

- MCF Community Fund (Unrestricted) Community Development
- Youth Development
- Education
- Basic Human Needs
- Arts/Literature

**NEW IN 2015-2016**

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The MCF Investment Committee approved a new MCF Investment Policy. The committee is made up of local investment professionals who oversee, with the MCF Board of Directors, the investment policies and of the Foundation. To read the new MCF Investment Policy, visit the new website: www.montrosecf.com and look under the “About” tab, “Financial Info.”

**MCF INVESTMENT POLICY**

- Alpine Photography Club
- Angel Tree (Cobble Creek) Burgundy Sherrif Charity Fund
- Cail’s Corner and The Stage Coats for Kids
- Common Ground Community Tunel of Lights Dollars for Scholars Education Fund
- George & Allyson Crosby Fund for UMC*
- Richard & Julie Duncan Fund* Education Fund
- Elizabeth Elicker-Mize Fund** Helping Hand Fund
- Homelessness Fund
- Montrose Art Council Endowment Fund
- MCF Tomorrow Fund
- MHS Stadium Project
- Montrose Arts Council*
- Montrose Center for the Arts Montrose Christmas Meals
- Montrose Lacrosse Foundation
- Montrose Recreation Foundation
- Montrose Tennis Association
- MRF Luis Estrada Swimming Scholarship
- Oake Sweet Corn Festival PAX (Montrose Public Art Experience)
- Riverview Initiative
- Rural Philanthropy Days
- Shoes for Kids-Rotary Stuff the Bus Substace Abuse U Valley Vixens/Roller Derby Western Colorado Landscape Collaborative

The MCF Investment Policy focuses on income first and capital preservation or preventing loss in the portfolio second.

**THE MCF FAMILY OF FUNDS**

New Funds in 2015-2016*

- Arda White Memorial Scholarship
- Cobble Creek Men’s Golf Association Scholarship*
- Ken Gale Chamber Memorial Scholarship
- Tom Gilmore Memorial Law Enforcement Scholarship*
- Maslow Academy Tuition Assistance
- Montrose Rotary Club Scholarship & Vocational Scholarship
- Squat & Juanita Moore Scholarship
- Ken & Marlene Townsend Scholarship
- Transition Lab Assistance Fund
- Phil Trombudo Memorial Scholarship

*New in 2016!

**MCF SCHOLARSHIP FUNDS**

- Ada White Memorial Scholarship
- Cobble Creek Men’s Golf Association Scholarship*
- Ken Gale Chamber Memorial Scholarship
- Tom Gilmore Memorial Law Enforcement Scholarship*
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The MCF Advisory Board

The Advisory Board of the MCF convenes periodically throughout the year to discuss the needs in the community and make recommendations to the Foundation Board on ways to meet those needs. By utilizing the diverse skills and backgrounds of the Advisory Board, the MCF strives to connect with the local community we serve.

Thank You!

To our Advisory Board Members who dedicate their time and expertise to help the community. Members include:

Kaye Hotspiller, President
Kjirsten Davis, Vice President
Kirk Henwood, Secretary
J David Reed, Treasurer
Diana Aha, Director
Joel Evans, Director

Carol Friedrich, Director
Leslie German, Director
Phil Harper, Director
Rob Omer, Director
Chris Reichmann, Director
Vineet Singh, Director

Phoebe Benziger
Kris Flower
Jim Kitchell
Dick Manhart
Buck Miller

Judy Reissen
Patty Voorhis
Paul Weisner
Craig Wolvekton

The MCF Board of Directors Serving our Community

THE FOUNDATION STRIVES TO

EXPAND Expand the capacity of community organizations by providing grants, networking opportunities, and education.

SERVE Serve as a resource to the community to enable members in the community to address needs and issues.

ENCOURAGE Encourage volunteers and legacy giving, while building and maintaining permanent endowed funds.

DEVELOP Develop leadership in the community.

INCUBATE Incubate qualifying community projects and partnerships.

The MCF helped coordinate the 4 th Annual Savor the San Juans Home and Garden Show. Over 300 attendees are expected to be in Montrose attending workshops, presentations, and networking receptions. RPD gives regional nonprofits access to newly identified resources, opportunities for collaboration, and capacity building services to help meet their current needs and increase their sustainability. Visitors will have a chance to learn more about our region and Montrose specifically, as they stay in our hotels, visit our attractions, dine in our restaurants, and shop in our local businesses.

Thank You!

More “Egg-Cellent” Fun!

Good sport and Montrose County Manager, Ken Norris poses with MCF Board member Phil Harper at Community Night at the Montrose County Fair.

The MCF participated in the “Egg in the Face” booth which gave Montrose residents an opportunity to put some Egg in the Face of local leaders, who are safely tucked behind protective glasses and chicken wire. Lines were long and eggs sold out quickly as fairgoers threw some 25 dozen eggs at the Montrose County Manager, FFA Teacher and Fair Animal Superintendents. Proceeds raised from the event were given to the MCF to be used for education or youth programs.

Thank You!

MCF Business Partners

Now this past year is the MCF Business Giving Program, a tiered giving program for businesses who pledge to give to the MCF for three years. This is a membership group comprised of local businesses that believe in the MCF and the importance of philanthropy in our community. We would like to thank the following businesses that have signed on as pledged business donors:

Alpine Bank
BRIDGES
Colorado River Engineering
Black Canyon Surgical Center
Central Distributing
TEI Rock Drills
Bridges
Montrose County School District
The MCF Board of Directors wishes to thank Timberline Bank for providing office and conference room space for the Foundation. Timberline Bank’s support of the MCF has reached almost $100,000 over the past nine years. Thank You for being such a strong community partner!

The Bridges Spectacular Summer Concert - A Benefit for The Dolphin House and MCF

A beautiful night and a stunning view set the backdrop for the Summer Concert on the Lawn at The Bridges featuring Restless Heart. Local band, The Anders Brothers, opened for the Grammy Award winning band that played for almost two hours. The Bridges hosted a VIP section with 500 people including sponsors and about 550 general admission attendees who danced the night away.

Sponsors included Flower Motors, Central Distributing, TEI Rock Drills, Timberline Bank, Alpine Bank, Dably, Wendeland & Co and Gordon Composites. Thanks also to the generosity of Eric & Beth Feely and The Bridges, the concert raised money for programs that assist the community through the MCF and The Dolphin House Child Advocacy Center.

Pay attention, listen, be inclusive, don’t gossip, show respect, be agreeable, apologize, give constructive criticism and take responsibility. These are the 9 simple tools for practicing civility taken from P. M. Forni’s Book “Choosing Civility. These tools are the cornerstones of the Montrose Civility Project, a citizen-led effort created to urge the citizens in the Montrose area to communicate in a more respectful and effective way. This is not a campaign to end disagreements, it is a campaign to improve public interaction by simply reminding ourselves of the very basic principles of respect.

Thank you for being such a strong community partner!

The biggest event of the year for regional nonprofits will be coming to Montrose June 14th-16th, 2017. Every four years, Rural Philanthropy Days (RPD) visits the San Juan region of Colorado, including nonprofits and community groups in Gunnison, Hinsdale, Montrose, Ouray and San Miguel Counties. San Juan Rural Philanthropy Days was designed specifically to better acquaint private funders and grant-making foundations with rural nonprofits and the issues they face in their respective communities.

Leadership, training, education and capacity building are so important to the MCF that we list these activities in our mission. It isn’t surprising that a lot of effort goes into working with local, regional and statewide organizations to provide relevant training opportunities to nonprofits. The MCF is a member of the Western Colorado Nonprofit Council who coordinates and provides quarterly training sessions on the Western Slope. The trainings were held in Gunnison, Montrose, Delta, Ridgway and Grand Junction.

Together with the Council, the MCF helped coordinate a Top Notch Nonprofit training hosted by Western State University. This one-day conference featured a keynote speaker from the Proximity Space in Montrose and sessions for nonprofits including: Know When to Grow, Board Fundraising, How to Engage the Community and Budgeting, Accounting and Reporting. The day prior to the Top Notch Nonprofit conference, the MCF helped sponsor an all-day training on facilitation with specialist, Paul Duba.

Stay tuned for the 4 th Annual Savor the San Juans Home and Garden Show! This event will feature local produce prepared by local chefs in six local homes. This year’s event took place on Sunday, September 11th and served as a tribute to first responders. A big “Thank You!” to our headlining sponsor - Alpine Bank as well as TEI Rock Drills, Remington’s, The Mze Family, Eldorado Financial, Montrose Daily Press, Intermountain Pathologist Group, Judge Blinds and Camelo Gardens, as well as all the producers, sponsors, decorators and volunteers who supported this unique event. More than $20,000 was raised to support the many community projects carried out by the MCF and the Valley Food Partnership.
CHANGE A LIFE

It strikes me how incredibly diverse the projects and programs are that the Foundation happily supports. In one week we write checks to the food pantry, to pay for a driver for a child who is struggling with physical limitations, to cover a garage door for a family—no more stamps, no more office services. Teachers, librarians, and families need to secure new transportation for veterans. I recently read an inspiring book called Every Gift Matters. The author, Carrie Morgedal, mentions Dr. Vader’s Helping Hand fund, and she has a local connection to the fund. “You have the power to change someone’s life. Now you choose to spend your donation dollars making a difference,” states Morgedale in the book.

Sara Plumhoff
Executive Director

DAY OF GIVING

Visit Montrose Community Foundation on ColoradoGives.org, a year-round online giving website that features more than 1,500 Colorado charities. Learn about our programs, how we are helping our community, and donate online directly to us. Tell your friends helping our community, and donate. Visit Montrose Community Foundation online giving website that features more than 1,500 Colorado charities. Visit Montrose Community Foundation online giving website that features more than 1,500 Colorado charities. Visit Montrose Community Foundation online giving website that features more than 1,500 Colorado charities.

DONATE YOUR VEHICLE TO SUPPORT A CAUSE YOU LOVE

Donating your unwanted vehicle to the MCF or one of our many funds is easy way to give back to your community and receive a tax benefit. The MCF works with a third party to handle the donation of cars, boats, trailers, snowmobiles, and other vehicles. One click or call, and they will take care of picking up the vehicle, transferring the title, selling the proceeds to the MCF for the fund you wish to support. Proceeds and deductions can only be determined once the vehicle is sold. Vehicle donation information is available on www.montrosecf.org, “ways to Give”, “Vehicle Donations”.

SAN JUAN INDEPENDENT FILM FESTIVAL

This is the third year that I’ve put together the MCF Annual Report and each year I continue to be impressed with securing new transportation for veterans. It is my hope that our community’s future is important to all of us.

Please make check payable to Montrose Community Foundation and mail to PO Box 3020, Montrose, CO 81402.

Please contact me so that I can learn more about being involved in my community.

Sara Plumhoff
Executive Director