Making an Impact Through Giving

One of the most important and distinguishing features of the MCF and all community foundations, is our role as a strategic and charitable giving partner to donors. Often, this is also the aspect of the MCF that many aren’t aware of or don’t fully understand.

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 $210,000 to programs and organizations through our MCF donor and funds.

Through Donor Advised Funds (DAF), individuals, families, and businesses give a tax-deductible gift to the MCF to begin a fund and then advise the MCF on where they’d like to grant those dollars. They can give as little as or as much as they’d like each year and rely on the MCF to suggest relevant projects and programs that they, their family or their employees feel the most passionate about. This year our Donor Advised Funds gave more than $150,000 to programs and organizations like Sharing Ministries, Montrose Volunteer Driver Program, Montrose Botanical Society, Habitat for Humanity, Montrose Recreation Foundation, Permanent Book Fund, Gunnison Gorge Anglers, Community Options, Dolphin House, West End Economic Development Corporation and many, many more.

Through scholarship funds that have been established with the Foundation, the MCF was able to award almost $40,000 to students in Montrose County, that’s twice as much as the previous year. 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.

When gifts are made to the MCF Endowment, we use the income earned from that fund to put the dollars back into the community. In 2015 we granted $11,000 during our 2014-2015 grant cycle to ten nonprofit organizations. The Foundation also helped raise $7,000 for the new Montrose Community Recreation Center with a matching grant and stepped out of our usual local purview to help the Papua New Guinea Foundation and Montrose Rotary Club to help ship medical supplies to Papua New Guinea.

MCF 2015 By the Numbers:

• Through our grant cycle, scholarship grants, donor advised fund grants, component and endowment/agency fund grants, the MCF facilitated the giving of over $210,000 back into the community from July 2014 through June 2015. That is a 45% increase over the previous fiscal year.

• The MCF administered nearly $40,000 in scholarship and tuition assistance to deserving students of 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.

• Continuing its upward trend, in the last fiscal year, the Foundation assets grew by 5%.

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• There are 52 charitable funds in the MCF Family of Funds.

• Seven new funds were added to the MCF Family of Funds in 2015.

Together We Make Our Community Better

So… tell me what the Montrose Community Foundation does?

As a board member and new President of the Montrose Community Foundation I get this question a lot. And surprisingly, it’s a difficult answer to give in two minutes or less (or the time it takes to give an elevator pitch).

Simply put: Together with donors, nonprofits and other organizations we make our community better. And how do we make the community better? By partnering with donors, directing and funding and supporting nonprofits and serving as a community resource for important issues. We work steadily and often behind the scenes to make the community better.

Supporting incredible organizations, Montrose Community Foundation funds have helped a mother and her children find shelter, given a homeless man vision with a pair of eyeglasses and moved Sharing Ministries a little bit closer to their dream of a facility that helps meet their needs. Better together.

You may not see our name on the marquis – but we coordinate with regional, professional organizations to bring relevant training for nonprofits to the Western Slope. Better together.

You won’t see us teaching in classrooms - but together with our scholarship funds and local schools and universities, we help students of all ages realize the dream of furthering their education. Better together.

I hope you enjoy reading this special insert and learning about efforts and success stories in our community. If you value the work that the Montrose Community Foundation is doing, please consider joining the Foundation in some capacity as a volunteer, committee member or donor. Together we can make the community better.

-Kaye Hotsenpiller, Board President

Montrose Community Foundation
P.O. Box 3020, Montrose, CO 81402
www.montrosecf.com • montrosecfmontrosecommunityfoundation@gmail.com • 970-249-3900

Growing a Strong Local Community!
Giving Back to the Community with Grants

2015 Grant Recipients
- All Points Transit
- CASA Voices for Children
- City of Montrose
- Girls on the Run
- Haven House
- Hilltop Community Services*
- Montrose Homeless Coalition*
- HopeWest
- Kid’s Aid*
- MCSD RE1J Centennial Middle School
- Partners
- Sharing Ministries Food Bank*
- Uncompahgre Legal Aid
- Valley Food Partnership
- West End Family Link Center

* Indicates organizations who received City of Montrose Community Impact Grants.

Throughout the 2015 competitive grant cycle, the MCF supported 15 different organizations with $21,000 in grant monies. The MCF and the Grants Committee is confident that these grants will make a difference in the lives of many.

City of Montrose and MCF Working Together

For the third year, the MCF is honored to have been asked to partner with The City of Montrose distribute Community Impact dollars through our 2015 Grant Cycle. Understanding that if basic human needs are not met for individuals, the community as a whole cannot thrive, the Council decided they wanted the City Community Impact monies to be granted to nonprofits administering programs that helped meet the needs for food, shelter, and other human services. The Foundation’s grant committee awarded a total of $10,000 to: CASA to support their work with child advocacy; Hilltop Community Services and the Montrose Homeless Coalition to support services for housing and shelter; and Kid’s Aid and Sharing Ministries to help families and kids who were facing hunger.

HopeWest Kids Program to Receive Matching Grant in 2016

The MCF Board of Directors is delighted to announce that the MCF will to give a matching grant of up to $10,000 to HopeWest to support the HopeWest Kids Program. HopeWest Kids is the only program of its kind in western Colorado that provides grief and bereavement services to children, teens and their families who are coping with the serious illness or death of a loved one. Specially trained counselors offer grief education and counseling in Delta, Mesa, Montrose, and Ouray counties.

Local Children Receive School Supplies and Coats

The MCF teamed up with local businesses and organizations to ease the burden of buying school supplies and coats for local families in need. In August, together with Alpine Bank, Altrusa International of Montrose, Family Career & Community Leaders of America (FCCLA) and the Montrose County School District, volunteers handed out over 330 backpacks filled with school supplies to kids. In November, with Timberline Bank, Altrusa, Kilbane's Cleaners and FCCLA, the Foundation helped collect more than 250 coats for kids. The coats were distributed to families before the cold weather set in.
“Individually we are one drop. Together we are an ocean.” – Ryunosuke Satoro, Japanese Writer

THE MCF FAMILY OF FUNDS

- Angel Tree (at Cobble Creek)
- Common Ground
- Education Fund
- Homelessness Fund
- MHS Stadium Project
- Montrose Lacrosse Foundation
- Montrose Recreation Foundation
- Montrose Therapeutic Riding Center
- Olathe Sweet Corn Festival
- PAX (Montrose Public Art Experience)
- Shoes for Kids- Rotary
- Substance Abuse
- U Valley Vixens/ Roller Derby
- San Juan Power Association
- Russell Cook Education Fund
- Helping Hand Fund
- Maslow Academy Fund & Tuition Assistance Fund
- Montrose Christmas Meals
- Montrose Police Charitable Fund
- Montrose Tennis Association
- MRD Luis Estrada Swimming Scholarship
- Olathe Youth Activities
- Riverway Initiative
- Stuff the Bus
- Transition Lab Tuition Assistance Fund
- Western Colorado Landscape Initiative

New MCF Funds in 2015

- Burgwyn-Shaver Family Fund
- Coats for Kids
- Montrose Botanical Society Endowment
- Montrose Rotary Club – Year of the Healthy Child
- Caitlyn Haynes Memorial Fund
- Elizabeth Elicker Mize Fund
- Montrose Center for the Arts

The MCF manages over 30 funds for organizations that achieve their charitable goals through the partnership with the Foundation. Below are just a few of the great things that these groups have accomplished in the past year.

Mary Vader’s Helping Hand Fund Tops $50,000 - In April, the Helping Hand Fund reached the incredible milestone of giving $50,000 to help individuals in Montrose and the surrounding community. The fund, whose mission is to simply Lend a Hand Up, Not Hand Out, gives assistance for immediate needs to individuals and families who are in a difficult situation and cannot receive services through other assistance programs.

Montrose Lacrosse Foundation - Interest and participation in lacrosse has been steadily increasing in Montrose over the last ten years and is the fastest growing sport in the U.S. In the fall of 2014, elementary and middle school teams competed in tournaments through the Montrose Recreation District. Through the hard work and dedication of many people and the formation of the Montrose Lacrosse Foundation, a dream became reality when the first official CHSAA Montrose High School Varsity/JV Lacrosse Team stepped out on the field in the spring of 2015.

Olathe Sweet, Sweet Corn - For the third year, the MCF partnered with the Annual Olathe Sweet Corn Festival, for its 24th year of promoting delicious and famous Olathe Sweet, Sweet Corn! The event featured nationally-known headlining band Natalie Stovall and The Drive and a Beer & Wine Garden. This year, more emphasis was placed on nonprofit participation. This year the event raised over $10,000 for local programs.

San Miguel Power Association Supports Economic Development through the MCF

The Town of Silverton, Telluride Foundation and West End Economic Development Corp. (WEEDC) receive donations from the San Miguel Power Association (SMPA) and COBANK “Sharing Success” program. The recipients were selected by the SMPA Board of Directors based on their potential value as drivers of economic development in their communities. The Blair Street Historic District Association, in partnership with the Town of Silverton, received $5,000 to install a rustic band shell in Columbine Park in Silverton. Another $5,000 check was presented to Paul Major, President and CEO of the Telluride Foundation, for their Paradox Basin Business Technical Assistance Initiative which seeks to support businesses in San Miguel, Montrose, Dolores and Montezuma counties. Finally, a $10,000 check was presented to Dianna Reams, Director of the West End Economic Development Corporation (WEEDC), to support their community kitchen project. The SMPA Donor Advised Fund is a component fund of the Montrose Community Foundation.

More “Egg-cellent” Fun!

For the second year, the Montrose Community Foundation participated in “Community Night” at the Montrose County Fair and Rodeo. The “Egg in the Face” booth gave Montrose residents an opportunity to put some Egg in the Face of local leaders. Six very good sports including County Manager Ken Norris, MHS Football Coach Jim Scarry and representatives from the Montrose County Sheriff’s office put on coveralls and protective goggles and braved the onslaught of eggs. Proceeds raised from the event were given to the MCF to be used for education or youth programs.
The Board of Directors wishes to thank Timberline Bank for providing office and conference room space for the Foundation. Timberline Bank’s in-kind donation of the facilities to the MCF has exceeded $80,000 over the past eight years.

Thank You!

Kaye Hotsenpiller, President
Phoebe Benziger, Past President
Kjersten Davis, Vice President
Kirk Henwood, Secretary
J David Reed, Treasurer
Joel Evans, Director
Carol Friedrich, Director
Leslie German, Director
Phil Harper, Director
Rob Omer, Director
Chris Reichmann, Director

Your Montrose Community Foundation’s vision is to grow a strong community by:

Connecting charitable donors and volunteers to community causes. The Foundation also strives to:

• Expand the capacity of community organizations by providing grants, networking opportunities, and education.
• Serve as a neutral convener in the community to enable members in the community to address needs and issues.
• Encourage estate and legacy giving while building and managing permanent endowment funds.
• Develop leadership in the community.
• Incubate qualifying community projects and partnerships.

Agency Endowment Funds: Planning for the Future

Through Agency Endowment Funds, the MCF provides a way for local organizations to invest in their futures. Agency Endowment Funds protect endowed monies for the future, provide income (depending on market performance), help demonstrate to donors a commitment to long-range financial planning and provide a way for donors to give complex gifts.

The following organizations have Agency Endowment Funds with the MCF:

• A+BC (Academic Booster Club)
• Breast Cancer Awareness
• Habitat for Humanity
• HopeWest
• Magic Circle Players
• Montrose Botanical Society
• Montrose Regional Library Foundation
• United Methodist Church

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 our fund stakeholders.

The MCF Investment Policy focuses on capital preservation, preventing loss in the portfolio while generating income. The objective is to provide our partners with an annual distributable income of at least 4%.

Plan Your Legacy Spruce Society

The MCF Spruce Society helps individuals continue to give and support important causes in the community beyond their lifespan. The Foundation has set up endowment funds to help ensure that needs meaningful will be served for generations to come:

• Community Development
• Education
• Arts/Literature
• Youth Development
• Basic Human Needs
• Forever Fund (Unrestricted)

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(s), bequests, estate gifts, life insurance and real estate.
Scholarships Continue to Shape Lives

Excerpted from a letter the MCF received from San Juan Coloradans for Nebraska Scholarship Recipient, Eric Fries, Ouray High School Class of 2005.

“It’s been ten years since I received a college scholarship from the San Juan Coloradans for Nebraska and to this day I am still humbled and honored for having received this award. This was vital assistance with my college tuition and the experience and education has started to pay significant dividends for my career and my life.

I had originally accepted this scholarship with commitment to the Colorado School of Mines as a Mechanical Engineering major. After one semester, I had determined that the school and my degree pursuit was not the best fit for me. As such, I transferred to the University of Colorado at Colorado Springs (UCCS) to continue my college career and pursue degrees in Geography and Environmental Studies. I am proud to say that with my focus and interest, I was able to graduate with honors (cum laude) a semester earlier than expected and within three years of the transfer.

After some extended education opportunities, various internships and entry level positions, I am now a tenured team member for DigitalGlobe, a commercial and defense satellite image acquisition and analysis company based in Westminster, Colorado. On a personal note, I am also married to the love of my life (whom I met while at UCCS) and we are expecting our second child very soon. I am living my American Dream and will continue to push forward to maintain it.

Above all, the theme of my brief story is one which wouldn’t have happened without adequate support and that is the purpose of this message. I once again would like to thank Mr. Swanson and the SCJN Committee for their generous gift to this high school graduate a decade ago. A college education should never be wasted and I made sure not to do so. I hope all is well on the western slope and leave you with three parting words: Go Big Red!”

In 2015 the final two SCJN Scholarships were awarded to recipients Caitlin O’Meara and Zhado Trumbo. The group has awarded more than $40,000 in scholarships to high school seniors in Montrose and Ouray counties since they began the program in 2002.

MCF Scholarship Funds

Over the years, many area students have merited a scholarship grant through the MCF to further their education and see their dreams become reality. Through an objective application and review process, the MCF works with local families and service clubs to identify well-deserving students who will benefit from these scholarships.

- Ada White Memorial Scholarship
- Ken Gale Memorial Scholarship
- Phil Trumbo Memorial Scholarship
- Squint & Juanita Moore Scholarship
- Kenneth & Marlene Townsend Scholarship
- Montrose Rotary Club Scholarship
- San Juan Coloradans for Nebraska Scholarship (2015 Final Year)

First-Ever Kenneth & Marlene Townsend Scholarship Recipient

Caitlin O’Meara, a 2015 graduate of Montrose High School, was awarded the very first Ken and Marlene Townsend Scholarship, a $10,000 four-year renewable scholarship. O’Meara also received the San Juan Coloradans for Nebraska Scholarship as well as a scholarship from the Montrose Rotary Club. In a thank you note to the Townsend family, Caitlin wrote that she hopes to make the Townsends proud of her as she pursues a degree in Engineering at the Colorado School of Mines. Her career goal is to become a doctor or lawyer.

Savor the San Juans a “Sell Out”!

Together with the Valley Food Partnership and an amazing volunteer committee, the MCF helped coordinate the 3rd Annual Savor the San Juans Home and Chef Showcase. The event features local chefs prepare local dishes in local homes and venues. This year’s event drew 500 attendees who tasted and toured six Montrose properties including the Lark & Sparrow Historic Venue. The tour ended with desserts and wine, beer and cider tasting at The Turn of the Century Saloon. A big “Thank You” to our headlining sponsors - Remington’s at the Bridges, Alpine Bank, Montrose Daily Press and TEI Rock Drills, as well as all the producers, other sponsors, decorators and volunteers who supported this unique event. Proceeds support the many community projects carried out by the Montrose Community Foundation and the Valley Food Partnership.

Support the MCF! Become a Baldridge Society Member

Pledged giving is a critical piece in the development of a strong, healthy community foundation. The Foundation proudly recognizes philanthropists who make annual donations and pledge to give over the course of five years as Sustaining Baldridge Society Members.

Benefits include: Ticket(s) the first year to the MCF Baldridge Gala; recognition in materials; an email newsletter and an MCF donor decal.

Patron Level: $750 per year or $63 per month

Fellow Level: $500 per year or $42 per month

Friend Level: $250 per year or $21 per month

Please Save the Date!

April 23, 2016 for the Baldridge Gala at The Lark & Sparrow
MCF Partners with The Bridges and The Dolphin House for Spectacular Summer Concert

Damp weather did not stop some 1,500 people from coming to The Bridges in July for the Sawyer Brown Summer Concert on the Lawn. Local band, Rusty Mountain Society was the opening act for the evening. Concert-goers were treated with a spectacular rainbow that appeared over the stage, just as Sawyer Brown began their set. Sponsors included Source Gas, as well as Montrose County, the City of Montrose, and Grand Junction. Topics for the sessions included financial management, strategic planning and finally a full-day training called, Mobilizing Your Board to Fundraise. These quarterly trainings will continue in 2016; the first training, Ongoing Training for Nonprofits, will focus on human resources.

As I write this report, I am amazed at how much the Foundation has accomplished in one year! In January we celebrated 25 years of giving at our Silver Anniversary Gala. In February we gave out $21,000 to grant recipients for our annual MCF grant cycle. We also helped host two trainings for nonprofits on Boards and Financial Matters in the first half of the year. In July the MCF Board leadership changed with a new executive committee and for the first year, we helped host a summer concert on the Lawn at The Bridges. We welcomed two new donor advised funds which began to support community projects almost immediately and updated our website to better promote our funds and encourage online giving. This month the Board decided to do something new and held a reception to acknowledge and thank our Baldridge Society members. In early 2016 we will announce a new collaborative initiative to promote character in our community and unveil a new website. Stay tuned…things are happening. If you’d like to be a part of this vital and growing Foundation, please contact me or one of the Board of Directors. --Sara Plumhoff, Executive Director

Looking back on a second year filled with many firsts

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Ongoing training for nonprofits

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. In August, the Colorado Nonprofit Association, Colorado Participation Project and Colorado Resource Center (CRC) came to Montrose to lead a half-day workshop titled, Mobilizing Your Board to Fundraise. These quarterly trainings will continue in 2016; the first training in January will focus on human resources. Visit www.montrosecf.com for more details.

MCF Community Service Award Winner Barbara Bynum

Barbara Bynum, a loyal and passionate supporter of the MCF, is a Montrose native. Barbara has given countless hours to the following organizations: Montrose County School Board as a Former Director and current Accountability Committee member; Montrose Recreation District; Montrose Education Foundation; Academic Booster Club; the Friends of the Montrose Community Recreation Center; the Forum at Heidi’s; school committees and sports organizations. In addition, Barbara has been appointed by Governor Hickenlooper to serve as a representative of public, private or secondary education on the State Board of Land Commissioners.

MCF Annual Community Service Award Winners can request that a grant of $1000 be given to the nonprofit of their choice. Barbara asked that the Montrose Marlins receive the $1000 grant on her behalf.

Thank You for Your Service!

Self-described as a “mom, wife, public school and recreation advocate and volunteer,” Barbara Bynum’s personal biography was expanded by MCF Board member Kjendra Davis with traits such as “tireless, energetic, loyal and passionate” at the MCF 2015 Baldridge Gala in January when she presented the MCF Annual Community Service Award to Barbara. Barbara has given countless hours to the following organizations: Montrose County School Board as a Former Director and current Accountability Committee member; Montrose Recreation District; Montrose Education Foundation; Academic Booster Club; the Friends of the Montrose Community Recreation Center; the Forum at Heidi’s; school committees and sports organizations. In addition, Barbara has been appointed by Governor Hickenlooper to serve as a representative of public, private or secondary education on the State Board of Land Commissioners.

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Pledge Form

Yes, I’d like to support the MCF because community is important to me!

Name: ____________________________

Address: ____________________________

City, State, Zip: ________________________

Phone: ____________________________

Email: ____________________________

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

MCF is a 501(c)(3) not-for-profit organization. Donations are appreciated and tax-deductible.

www.montrosecf.com • (970) 249-3900 or montrosecommunityfoundation@gmail.com

Please find my donation for $__________ enclosed. (Credit card donations can be made on our secure website www.montrosecf.com or by calling 249-3900.)

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

I would like to join The Baldridge Society for a little as $21 per month. Please follow up with me about making the pledge to join.

(If you do not wish to make a pledge, please check that box below.)

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