MONTROSE COMMUNITY FOUNDATION ANNUAL REPORT 2020-2021

### **Our Mission**

The Montrose Community Foundation inspires and empowers giving, leadership, and service to improve the quality of life for all in our community.

# Support Your Local Community Foundation

### Dear Friends,

As you look at local photographer Paul Hurschmann's photo on the front of our latest 2020-2021 Annual Report, we hope it fosters a sense of hope, relief, and optimism. It feels good to be hopeful for the coming year.

During our last fiscal year, the Montrose Community Foundation (MCF) focused on giving grants and coordinating relief funds. In fact, for the second year in a row, we've given out over \$800,000 in grants to our local and regional nonprofits. (More details on pgs. 9-10.) Additionally, MCF moved into our own little, office space on Main Street, hired a manager for our expanding grant and scholarship programs, and grew our restricted fund assets by 23 percent. It's been a productive year!

What we haven't done is hold a fundraising event. Therefore, our request is simple:

Please consider donating to us directly, your local community foundation.

Your donation will help us continue our important work and improve the quality of life for all in our community as we respond to the most pressing local needs, grow our Community Impact Fund (see page 2), administer grants and scholarships, and collaborate with other non-profits to address the root causes of local issues.

### We could use your support now more than ever.

Forge forward with us into a brighter future for all.

#### Yours in service and with gratitude,

Sara Plumhoff	Laird Landon
<b>Executive Director</b>	<b>Board President</b>





Unrestricted Fund: Rather than designating how the money will be spent, donors trust MCF to determine the most effective ways to seize our community's most compelling opportunities or respond to the most pressing needs. Just as we have for 30 years!

### Goal: Grow Community Impact (Unrestricted) Fund

Year After Year, MCF has Addressed our Community's Ever-Changing Needs through Strategic Grant Making.

The MCF Board has identified raising unrestricted funds for community good as a priority. Introducing...the Community Impact Fund. As the Community Impact Fund grows, so does our ability to make strides towards addressing the root causes

of local issues like mental health, housing and access to healthcare. Look for more information about this exciting program in the next year.

## For History Buffs, Horticulture Enthusiasts & Montrose Proud \_\_\_\_\_

The Montrose Botanical Society's Historical Homestead Project Will Re-Create and Preserve Some Original Components of the First Homestead in Montrose!

It will be a local family and tourist destination, proudly illustrating the agricultural and horticultural history of our early 19th century settlers. This new addition to the SW corner of the Montrose Botanic Gardens (1800 Pavilion Drive), will feature an Interpretive Center that will offer educational and demonstration areas. An authentic re-creation of a cabin and a restored original jacal structure from the actual homestead, will be featured, as well as historical plantings of the time.

As Montrose becomes a community of progress and growth, this project will be a legacy that keeps us connected to our precious past.

Throughout 2021-2022, the Burgwyn/Shaver Family fund has offered to match donations up to \$10,000 to make this historical asset come to fruition.

#### For information or to donate directly go to: montrosegardens.org/ historichomestead

Donations can also be made by check, securities or transfer through MCF.

Although no historical photographs exist of the

Kallstrom Homestead, the photograph above

gives us some idea of what his home looked

like. This historical image was taken around

1882 near Montrose and represents a typical

Kallstrom's claim filed with the General Land Office in Gunnison, Homestead Record No.

394. Ute Series, on file at the National Archives.

image below shows the wall in transport to the

Learn more at cityofmontrose.org by scanning

log(1) and jacal(3) construction style.

→ This is the last original jacal wall from the Kallstrom Homestead before its removal. The

Montrose Botanic Gardens in 2018.

Washington, D.C.

OR code.



United States Land Office my army M. 231 We Suin The Land above described





## Montrose Hardware "Building **Community**" Through MCF

You Might have Noticed Some Activity on the Corner of Park and Main Streets over the Past Year.

The business (formerly Park Avenue True Value Hardware) was purchased by new owners in 2020. Robert Peterson and his family are fully invested in supporting a vibrant and thriving Montrose community.

Montrose Hardware believes in the power of business to make a difference for everyone in Montrose through charitable partnerships, providing jobs, and high-quality products and services. To that end, they established the Montrose Hardware "Building Community" fund at MCF. Through this fund, the business is supporting teachers and students through grants and have funds available for local nonprofit programs and services.

The Montrose Hardware Grants are available for teachers in the Montrose County School District, Montrose County private school or

with Colorado Mesa University, Montrose campus. Students need to be enrolled in a school in Montrose County (either private or public) and be in the 5th-12th grades. The hope is to provide experiences inside and outside of the classroom that encourage critical thinking and make our students excited about learning. These grants support new ideas, "what ifs?", the sky's the limit and collaborative efforts imagined by those involved in the educational sphere.

Grant applications will be received on a rolling basis; and will be reviewed by a selection committee made up of community members and the donors. The deadline for applications is the end of the 2021-2022 school year or until the funds are dispersed.

Grant details can be found on montrosecf.com under community!



Montrose Hardware on Park and Main Streets.

Life isn't about getting & having, it's about giving & being.

Pledged giving is a critical piece in the development of a strong, healthy community foundation. Founder Cliff Baldridge, knew the value of committed, forward-thinking individuals who believe in the future of the community. MCF proudly recognizes philanthropists who pledge to make annual donations for five years as **Baldridge Society Members.** Sign up today





**\$500 PER YEAR** \$42 PER MONTH

**\$250 PER YEAR \$21 PER MONTH** 

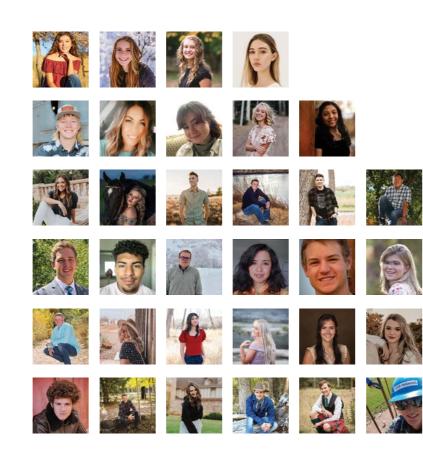
Benefits include: Ticket(s) the first year to the MCF Gala or MCF Event, w/permission, recognition in materials, event and news updates.

## Congrats 2021 MCF Scholarship Recipients!

Local Students and the High Schools they Graduated From in 2021 or University, College or Vocational Program They Were Attending When They Applied

*In order from left to right* Abby, Olathe HS Adair, Hotchkiss HS Alyssa, Delta HS Amelia, Laurel Springs School (Online) Anthony, Paonia HS Berrie, Utility Line Worker Brady, Montrose HS Cora, Montrose HS Miriam, Montrose HS Morgan, Montrose HS Elaine, Delta HS Eric, CMU Gavin H., Olathe HS Gavin L., Olathe HS Nathan, Peak Academy Nolan, CO School of Mines Raul, Montrose HS

Rvan, Delta HS Halima, CMU Jacen, Cedaredge HS Jamie, CMU Iordan, Montrose HS Samantha, TX Christian Seydeanna, Montrose HS Tawny, Paonia HS Theresa, CO School of Mines Jorryn, Vision Charter Joshua, Montrose HS Kyler, Montrose HS Kylie, Montrose HS Tyler, Montrose HS Zachary, Montrose HS Zebadiah, Utility Line Worker program Mahlia, Montrose HS (not pictured)





## **First-Ever Nick H. Gray** Scholarship Recipients

Fall 2020 Marked the First Time That the Nick H. Gray Scholarship was Offered Through MCF.

This generous scholarship will pay for the majority of four students' tuition for the next four years. Nearly 30 applications were received from MHS and OHS graduating students. The MCF Review Committee and Nick H. Gray Estate Trustees interviewed several finalists and chose the following recipients:

Abby Rubalcaba, (OHS graduate) who is attending Colorado Mesa University and studying to be a pediatric therapist.

**Tyler Reed**, (MHS graduate) who is attending Oklahoma State University for agriculture and business.

Raul Martinez, Jr. (MHS graduate) who is studying Nursing at Colorado Mesa University.

**Brady Cassidy**, (MHS graduate) who is studying business and accounting at Pacific University.

In April 2021, the first-ever Nick Gray recipients were recognized at the FFA celebration dinner where Nick Gray was posthumously inducted into the Colorado Agriculture Hall of Fame.

The Nick H. Gray Scholarship is an annual scholarship; the application will be available at montrosecf.com in early December 2021.



Pictured from left to right, 2021 Nick H. Gray Scholarship recipients: Abby Rubalcaba, Tyler Reed, Raul Martinez, Jr, and Brady Cassidy.

### **Pioneer Family Scholarship**

New! The Roy & Louis Faussone Scholarship Helps Students Access Higher Education.

The Louis P. and Teresa Faussone family (Louis P. was one of six brothers) of Montrose, Colorado were immigrants to the United States from northern Italy in the latter part of the nineteenth and early twentieth centuries. Arriving in Montrose, for a time "the six" had adjoining farms, east of town on Highway 50.



Louis "Babe" Faussone shown with a photo of his late brother, Roy Faussone.

The last of the farms owned by his late father Louis P., has been owned since 1946 by Louis F. "Babe" Faussone, born in Montrose in 1923. Following his army service in World War II, he partnered with his brother Roy B., also an army veteran, and together they grew crops and vegetables for 64 years. They were especially known for raising potatoes that supplied many of the restaurants in town.

The Faussone brothers discussed the idea of creating a scholarship. Babe explains, "It is my goal, and that of my late brother, that a young person who shows great promise and who may not be in the top tier of his/ her class, but who shows intellect and determination should be given an opportunity to purse his or her dreams."

The scholarship will be available for any student graduating from a public school in Montrose County who demonstrates financial need and ranks in the 70-90% of their class. Details will be available in early December 2021 on: montrosecf.com/apply-for-a-scholarship

### We've Moved!

After 15 Years of Calling Timberline Bank Building our Home, the Montrose Community Foundation has Established New Offices at 525 East Main Street.

We are loving our new, downtown location and enjoying being in the heart of Montrose. Just off the corner of Main Street and Park Avenue, you will find us in the Hartman Building. Stop by and see us!



Thank you for local community

foundation. Without your support and office space over the past 15 years, we would not be here.





MCF - Best wishes in your new location!

### City of Montrose: Parnter for Good

\$30,000 was Granted Through MCF to Local Nonprofits

Since 2013, the City of Montrose has partnered with MCF by giving the Foundation Community Enhancemen dollars to administer. For 2020-2021. \$30,000 were granted through the MCF during the Impact Grant Cycle to local nonprofits.

Recipients included: Montrose Medical Mission, Dolphin House, Haven House, Girls on the Run, Magic Circle and more! To date, the MCF has granted nearly \$200,000 for the City of Montrose for Community Enhancement.

**Thank You!** 

## **Business Giving Program**

The MCF Business Giving Program is a Tiered Giving Program for Businesses who Pledge to Give to the Foundation for Three Years. The Generosity of These Businesses Help MCF Achieve our Mission.

These businesses receive benefits like:

- Maximum tax deduction for donation
- Logo with link on montrosecf.com
- Promotions in Annual Report and MCF printed materials
- Tickets to MCF events their first year and more.

The MCF can be a valuable philanthropic partner to businesses by administering business Donor Advised Funds which help businesses and their employees to actively participate in charitable giving.

V.

If you would like to learn more about the Business Giving Program or how a Donor Advised Fund might help your business, please contact the MCF office at 970.249.3900.

We would like to thank the **MCF Business Partners:** 



Edward Jones

HRIS REICHMAN







GENERAL CONTRACTING • ARCHITECTURE

this event.

SAVE THE DATE February 4, 2022 You won't want to miss our 3<sup>rd</sup> Diner en Blanc

Fun, food and philanthropy in a surprise "pop up" location. Check back on montrosecf.com for details on how to reserve vour tickets.

# **Uncompany Gives, A New Regional Collaboration**

For the First Time, the Montrose Community Foundation has Become a Regional Champion for Colorado Gives Day!

Our Colorado Gives Day Region is called "Uncompany Gives "(awesome!) and will include any qualifying AND registered nonprofits from Delta, Ouray and Montrose counties.

As a regional champion, we get to promote the Uncompany in one place with a separate webpage. What this means for donors is that they can visit the Uncompany Gives page to see our local nonprofits, and not have to do an individual search for local nonprofits who *might* not be local. We feel that this will make Colorado Gives Day better for donors and the nonprofits. In addition, a regional law firm, Ireland Stapleton Pryor & Pascoe, PC, has sponsored MCF to help us promote

As a reminder, Colorado Gives Day, December 7th 2021, is a statewide day set up to promote the support of Colorado's amazing nonprofit resources. Colorado Gives Day features a \$1 million incentive

fund. Every nonprofit receiving a donation on December 7th (Colorado Gives Dav) will receive a portion of the 1M fund, making every dollar you donate go further.

If you would like to help earn more of that \$1M to support needs in the Uncompangre, you can schedule a donation for December 7th. You can begin to schedule your donations any time after November 1st.

Simply visit www.ColoradoGives.org/ UncompanyreGives and donate to the nonprofit of your choice.

To support MCF directly, visit our Colorado Gives page at www.ColoradoGives.org/ MontroseCommunityFoundation

COMMUNITY FIRST FOUNDATION COLORADO ColoradoGivesDay.org Dec. 7



MCF Board shows support for Uncompahgre Gives.



Montrose Community Foundation • Regional Partner Montrose • Ouray • Delta

Sponsored by:



# **2020 Impact Grantees** Spotlighted

2020 Impact Grantees are Spotlighted Through MCF & our **Town Matters Interviews** 

## Nutritious Cooking Classes in a Pandemic

As we all struggled to get through the strange year 2020 brought us, MCF plowed ahead with their annual Impact Grant program. **\$70,000 was divided** among 23 local nonprofits by a review committee. Unable to hold an awards ceremony safely, we decided to hire Tonya Maddox of Our Town Matters and her film crew, to create individual interviews of each awardee.

We hope to provide each nonprofit with a copy of the interviews to use for their public relations programs.

We plan to publicize clips ourselves and feature a nonprofit a day on various social media outlets when editing is finally completed.

It will also be a fantastic tool to educate future grant committees on some of our local nonprofit's impact in the community.

A great time was had by all and we look forward to continuing the project when new nonprofits enter the scene.









"Our biggest success was also our biggest challenge. With COVID-19 we pivoted our program delivery model from inperson to online and it was a year of trials and errors. What we learned is that to reach as many families as possible in our community we need to offer a mix of learning opportunities - in person (when safe), live video, and recorded video. For accountability (and FUN!) we are asked participants to text a picture of their completed recipe - both the participants and facilitator love the ease of this, plus it adds a celebratory element!"

Valley Food Partnership received grant funding to help support their Local Farmacy Rx Program that helped provide 20 low-income Montrose families with a series of **English and Spanish cooking and** nutrition education classes and local food vouchers.





A Local Farmacy Rx participant shows off her newly acquired cooking skills via Zoom.

"I believe we positively impact lives every day! We meet people in crises, offer support, hope, and guidance for people to achieve their goals and live more fully. I heard a former client had brought someone else to the CWC for an assessment and asked the clinician if she recognized her. The clinician said she did but could not remember where they had met. The former client said, "Thanks to you I am alive today." They shared a few tears and details about how each had been since they had initially met. This is what we do on a daily basis." - Scott Campbell, PsyD, LPC, LAC

## **Grant Supports Outdoor Space** for Mental Health

"Thanks to the Montrose Community Foundation and other donors, we now have a beautiful courtyard at our Crisis Walk-In Center in Montrose. Our clients are thrilled to be able to get outside! Some people stay for five days at the Center, and before the courtvard was done, they couldn't go outside at all. Our staff says they often hear clients laughing when they're in the courtyard. Just as scientific research states, getting outdoors improves one's mood. This is a welcome respite to people facing mental health or substance use crises."

Leigh Robertson, Center for Mental Health



Community members enjoy the new outdoor courtyard at the Center for Mental Health's Crisis Walk-In Center

### Helping People Get Into their Homes

Nonprofit partners, Habitat for Humanity of the San Juans and Region 10 Area Agency on Aging work together to identify and help individuals (and families) who are not able to easily access their own homes. Their project has helped provide upwards of 10 or more ramps a year. During COVID 19, materials cost



nearly doubled, and increased the cost of building the ramps from about \$500 to \$1000 each. The MCF Impact Grant helped offset the cost of materials for these permanent ramps. In addition, the organizations have found additional grant funding to purchase temporary ramps, for people whose need for access is due to injuries or surgeries.



Recipient of a permanent ramp that was built by Habitat for Humanity of the San Juans and Region 10 Area Agency on Aging, shows how he feels about being able to get into his home again.



You might be surprised by how many ways you can give to MCF. We strive to make it easy for you to be generous to your community.

#### CASH

The simplest way to give and also provides immediate tax benefits.

#### **STOCK & SECURITIES**

If it's easier to donate appreciated stock, then we can accept your stock transfer directly into our investment account. You receive a charitable tax deduction and avoid capital gains tax.

#### **RETIREMENT ACCOUNTS**

If you are 70 ½ you can take advantage of the IRA Charitable rollover, or designate MCF as the beneficiary for your retirement account at end of life.

#### VEHICLES

Donate vour car. boat. RV. trailer, snowmobile or other piece of equipment and proceeds will go to MCF or an MCF fund of your choice. We work with a third party nonprofit who handles the process from pick up to title transfer to proceeds.

#### REAL ESTATE

The Foundation's Board will consider gifts of property and real estate on a case-bycase basis.

#### LIFE INSURANCE

Consider naming MCF as a beneficiary of your existing policy if it's no longer needed.

## **Relief in Sight**

#### MCF Continues to be the Organization That Gives

When the Pandemic hit in March 2020, who COVID 19, faced eviction, food insecurity, knew so much of our lives would be affected homelessness and suffered critical mental and not just our health from the virus?

If we were fortunate, we were able to work remotely, have our groceries delivered, join meetings via Zoom, go outside or hunker down with our families.

However, many in our community were not as fortunate. People lost their jobs, had to go to work not knowing what would happen, lost friends and family to health issues. We are still wondering what the impact will be on our children from remote learning and isolation.

Many worry about how they will make it now that the eviction moratorium is lifted and stimulus and additional unemployment payments are no longer.



MCF continues to be the organization that gives. The following are some partnerships and programs that helped.



### Helping Hand Fund Helps Healthcare Workers

Dr Vader's Helping Hand Fund raised money, applied for grants and gave \$150 gift cards to the Montrose Memorial Hospital healthcare workers to use for whatever they needed. They ended up granting \$7,500 in gift cards. The fund also gave a grant of \$750 to purchase Personal Protection Equipment (PPE) for the staff at San Juan Living Center.

### **Relief Fund**

The Montrose Emergency Relief Fund (MERF) was created in April 2020. Through business and individual donations along with grants from state and regional funders, a total of \$350,000 was raised for this fund. From April 2020 – April 2021, MCF granted out \$319,000 to local and regional nonprofits to help with COVID related needs. All grant requests were reviewed by a grant committee and funds were quickly released to organizations.

### \$350k Raised \$319k Granted to over 30 organizations

#### Shifting From Shoes To Masks

At the beginning of the pandemic, when PPE was scarce, one local volunteer organization partnered with local business, SOM Footwear. They raised \$10,000 in grants to help the local footwear manufacturer make 2,500 **masks.** As a manufacturer, SOM was able to maintain production activity during the first months of the shutdown. Local first responders and medical workers were thankful that SOM designed the most comfortable and safest masks they could access at the time.



Montrose Firefighters wearing SOM facemasks

#### Shade Structures for Outdoor Learning

In December of 2020, the Montrose Black Canyon Rotary Club and Montrose High School Interact Club reached out to local elementary schools to see what their greatest needs were. Responses came back and there was an overwhelming need for outdoor learning space to help with social distancing and to combat COVID-19 by increasing the schools' learning areas. Both clubs brainstormed and came up with a service project of raising funds for outdoor covered structures. Between grants and sponsorships, more than \$26,000 was raised to purchase the outdoor structures from Weather Port Structures out of Delta, CO. In Spring of 2021, the structures were built at all of the local elementary schools.



Volunteers assemble the outdoor shade structure at a local elementary school.

#### Restaurant & Meal Program Wraps Up

A partnership between MCF and a local group of volunteers created the HELP4HOPE restaurant gift card program. The City of Montrose granted \$20,000 and MCF raised the rest to distribute food cards to our front-line healthcare workers, our essential workers and those who had the most need. In total, 382 healthcare workers/essential workers and 691 families redeemed cards. Each card was worth \$50 (approx. a meal for four) and when the cards were redeemed at the restaurants, the restaurants were reimbursed. In total restaurants were reimbursed \$53,500 (one received almost \$20,000) and 1,073 cards were redeemed which means **4.280 meals were provided.** At the end of the program, the leftover funds were granted to the Montrose Memorial Hospital, who purchased \$2,500 in gift cards from the restaurants for their employees.



Help4Hope Committee with Montrose Memorial Hospital staff and Board.

### MCF Family of Funds

We Offer Donors Many Ways to Help Meet Their Charitable Goals

#### **Agency Funds**

A long-term fund held and managed by MCF on behalf of a nonprofit.

A+BC Academic Booster Club

Breast Cancer Awareness

Dolphin House Operating & Capital Funds

Habitat for Humanity of the San Juans

HopeWest

MCF Community Impact Fund

Magic Circle Players

Montrose Botanical Society

Permanent Book Fund

United Methodist Church



#### Designated Funds

Donors establish a fund to support specific charitable organizations. The Crosby Endowment-Children's & **Music Ministries** Richard & Julie Duncan Fund Olathe Wrestling Fund

#### Donor Advised Funds (DAF)

Donors establish a fund and receive tax benefits then recommend grants to charitable organizations at their convenience.

Burgwyn Shaver Family Fund

Elizabeth Elicker-Mize Fund

Montrose Hardware Building Community Fund

San Miguel Power Association DAF Western Slope Orthopedics DAF Tom Wiard & Emily Schneider Fund Eliza Wister DAF

#### Scholarship Funds

Ada White Memorial Auto Enthusiasts Carl Bivins Memorial Cobble Creek Men's & Women's Golf Association Delta-Montrose Electric Association (DMEA) Roy & Louis Faussone Gilbert Family Tom Gilmore Memorial Law Enforcement Literature for Life Maxine Keller Memorial Montrose Chamber Ken Gale Memorial Montrose Rotary Club Nick H. Gray Memorial Squint & Juanita Moore

Ken & Marlene Townsend

### **Fiscal Funds**

A partnership between a charitable group and MCF where MCF provides tax-exempt status and/or back-office administration. Alpine Photography Club Angel Tree (at Cobble Creek) Botanic Gardens Historical Homestead Common Ground/Kid's Aid Helping Hand Fund Heros for Kids Montrose Christmas Meals Montrose Emergency Relief Fund Montrose Junior Golf Alliance Montrose Lacrosse Foundation Montrose Recreation Foundation (MRF) Capital Projects MRF Luis Estrada Swimming Scholarship MRF Triathlon MRF Youth Recreation Projects

Montrose Tennis Association

Olathe Sweet Corn Festival

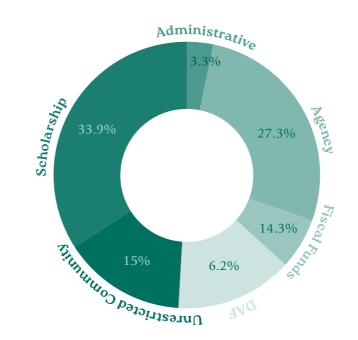
Substance Abuse Fund

Montrose Youth Football League

Shoes for Kids (Montrose Rotary)

### Total Assets in %

By Fund Type



### MCF Balance Sheet

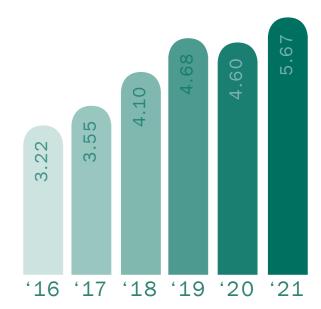
Fiscal Year Ended June 30, 2021

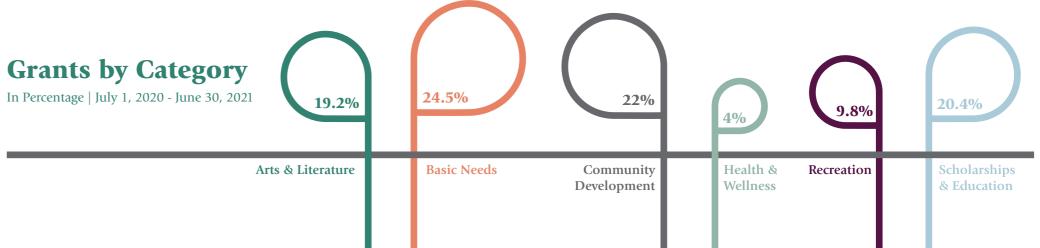
Assets	
Cash Equivalents	\$702,430
Investments	\$4,968,234
Total Assets	\$5,670,664
Liability	
Agency Funds	\$1,548,519
Misc.	\$85,000
Net Assets	
Net Assets	\$4,037,145
<b>Total Liabilities &amp;</b>	
Net Assets	\$5,670,664

This Financial Statement has not been officially reviewed by an outside CPA. If you would like to receive a copy of the most recently reviewed financial statements for MCF, please contact our office.

## Asset Growth

Assets Under Management in Millions Fiscal Years Ending in June







525 E Main St. Montrose, CO, 81401

### MCF Board of Directors 2020-2021





Laird Landon President



Vice President



Scott Wittman Treasurer

**David Frank** 

Lynn Schneider

Sarah Abbott Secretary

### Staff

Sara Plumhoff | Executive Director sarap.montrosecf@gmail.com

Lisa Paris | Office & Programs Assistant grants.montrosecf@gmail.com

Kim Lisenby | Scholarship & Grants Manager klisenby.montrosecf@gmail.com

### Our New Location

525 E Main Street, Montrose, CO 81401

#### Mail

P.O. Box 3020 Montrose, CO 81402

#### 970.249.3900 | montrosecf.com

(f) montrosecommunityfoundation



Carol Friedrich Past President



Terry McCoige



J. David Reed





Tonya Maddox



Vin Singh