

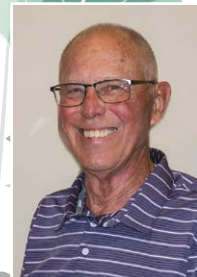


mcf

MONTROSE COMMUNITY FOUNDATION
ANNUAL REPORT 2021-2022

*Created for
Community,
Powered by
Generosity*

WE GIVE BACK



Thank you.
With unbounded gratitude,
LAIRD LANDON, MCF CHAIR

DEAR FRIENDS,

The Montrose Community Foundation (MCF) continues to be a stable presence in Montrose and the surrounding valley through invaluable support from you.

Moving into my second full year as Chair of MCF, I am proud of our Executive Director (Sara Plumhoff), her staff, and our board. This year, we asked donors and stakeholders, "Why is MCF Important?" We heard that we are seen as a trusted source for local giving. We heard that we are knowledgeable, diversified, and in the heart of the community. We love that. We also learned that some are unsure about what we do beyond grant making. We have some explaining to do! This next year, be on the lookout for communications that describe what our role is in this community.

MCF works with individual donors, families, and businesses to provide personal giving options. We partner with professional advisors and nonprofits to identify community needs and find ways to help. This year, we granted over \$450,000 to 85 nonprofits. We also gave more grants to nonprofits in the West End of Montrose County than ever before. See pages 3-4 for amazing photos of our grantees.

We hope the stories in this annual report will inspire you to continue to give. When you give, you help MCF make a difference -- both now and for generations to come.

We also appreciate your contributions to our new Community Impact Fund. This exciting way to give allows the board to respond to urgent needs, without having to create a new appeal each time an unexpected event occurs. It allows for a much faster MCF response with less staff effort. It has become my favorite way to give to MCF.

When MCF was founded by Rotary leadership in 1989, the needs and priorities in our community were different than they are now. Needs will continue to change. **But as you will see in this annual report, we will be here, improving the quality of life for all in Montrose and the surrounding valley – and it's all possible because of your support.**

LOCAL THEATRE BUILDS TOWARDS ITS FUTURE

AFTER 62 YEARS, ONE OF OUR COMMUNITY TREASURES IS HAVING A FACELIFT

Magic Circle Players has a dream to create a theatre that will invite everyone to come inside and experience the "magic" that is our community theatre.To date they have raised \$115,000 towards the \$1 million goal. They are



applying for various grants and will continue to fund raise. Magic Circle Players recently received Enterprise Tax Zone status, which means that when donors make a contribution they can claim extra tax credits. The intent is to begin construction in June 2023.

The exterior plan mirrors the nostalgia of traditional theatre architecture. An outdoor seating area will create a welcoming space that fosters community. There will be renovations in the entrance and interior spaces, the restrooms will be upgraded and expanded, and a larger, more efficient concessions area will feature an extended bar for intermission libations. Additional seating both inside and outside will allow guests to linger and socialize. They plan to add a streaming audio-visual presentation, archiving the organization's more than six-decade history.

Donations are still needed to carry on the tradition of quality live theatre. For information about donation and sponsor levels, please visit magiccircleplayers.com.

UNCOMPAGRE GIVES RAISES \$214K FOR LOCAL NONPROFITS IN FIRST YEAR

MARK YOUR CALENDARS FOR THIS YEAR'S COLORADO GIVES DAY: TUESDAY, DECEMBER 6, 2022

Mark your calendars for this year's Colorado Gives Day: Tuesday, December 6, 2022.

Uncompahgre Gives is the Montrose Community Foundation's collaboration that allows donors one-stop shopping to contribute to valley nonprofits on the annual Colorado Gives Day. **Formed last year, Uncompahgre Gives benefitted 44 participating nonprofits, including MCF, to the tune of \$214,000 raised during the campaign.** MCF was established as the coordinating Regional Champion.

Colorado Gives Day is the statewide day set up to promote giving and to make it easy to contribute online to Colorado nonprofits. Hundreds of nonprofits in the state are available for you to choose from as a donor and from which you can link to on our Regional Champion page. On this page, we display only the participating nonprofits from the Uncompahgre Valley.

It will be backed by a \$1.6 million dollar incentive fund which will be distributed proportionately. Other individual incentives will create additional fundraising opportunities for nonprofits who participate, making your donation go even farther.

Just so you don't forget, you may participate in early giving to the nonprofit of your choice any time between November 1st and December 4th, qualifying that nonprofit for incentive prize money.

Visit ColoradoGives.org/UncompahgreGives or to support MCF directly, visit our *Colorado Gives* page at ColoradoGives.org/MontroseCommunityFoundation.



MCF invited nonprofit participants to a rally last November hosted by San Juan Brews and Coffee. At the rally we discussed Colorado Gives Day strategies, greeted the public with swag and granted \$1000.

FROM OUR GRANTEES

MAKING MEMORIES THAT LAST FOR LIFE

Please convey our profound thanks to the Montrose Community Foundation for supporting our "Memory-Maker" program at Community Options! The new Memory-Maker Program allows the people we serve to check something off their, "bucket list." Our staff members nominate individuals served by Community Options to experience something special they have wanted to do for a very long time but have never been afforded the opportunity. This may include a day trip to a theatre performance in Grand Junction, a day of skiing, or a once in a lifetime trip to see a family member out of state.

In the case of one local family, the program helped them take a trip to Moab, Utah and share that unique area with their child. One of our early childhood specialists, Chelsie, says, "I can't begin to tell you how grateful this family was for this opportunity to go and spend a few carefree days in Moab with their little one, watching him thrive in a new environment, exploring, and learning new words. It's easy to say that he is now 100% obsessed with dinosaurs!"

Staff help clients submit their applications, describe their wishes, and when an application is chosen, help to figure out how to make it happen.

LORI SHARP

Grant Administrator



Local Community Options family enjoys a short trip to Moab from the Memory-Maker program.

GRANT PROVIDES FUN FOR KIDS AT HAVEN HOUSE

I wanted to forward some photos of the Haven House kids playing on our new playground. The smiles on the faces of these children provide more than words could ever say.

We were able to utilize grant funding this year to install a commercial playground to offer recreation and socialization opportunities for the children of families who reside at Haven House.

As you know, Haven House was founded with a desire to help address the issue of homelessness. We are the only 24/7 transitional housing program for homeless in western Colorado, except for limited services in Grand Junction.

We are grateful to MCF for continuing to support the Haven House program and to allow us to offer hope and a chance at a brighter future for the homeless families and children we serve.

Thank you and God Bless!

NICHOLE GUEST

Director of Resource Development



Children who live at Haven House enjoy some time outside on the new playground that was completed in April 2022.

GRANT HELPS CREATE DEDICATED SPACE FOR VICTIMS

Montrose Regional Health (MRH) used the grant dollars from Montrose Community Foundation to purchase equipment to treat victims of sexual assault with more dignity and respect. The Hospital dedicated a room where Sexual Assault Nursing Exams (SANE) are conducted, and the grant dollars were used to purchase equipment for that room. Equipment included a digital camera for recording the findings as well as some needed medical items to ensure there are no disruptions during the exam.



MRH caregiver shows off the new dedicated Sexual Assault Nursing Exam room.

Finally, the caregivers bought some furniture, decorations, and other items meant to provide some comfort during a time that is stressful and frightening.

To date, the Hospital has conducted exams on almost 30 victims.

ROBYN FUNK

Grant Writer

MCF BUSINESS GIVING PROGRAM

MCF Business Giving Program is a tiered giving program for businesses who pledge to give annually to the Foundation. The generosity of these businesses helps MCF achieve the Foundation's mission.

These businesses receive benefits like:

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

NONPROFIT OPERATIONAL BARN "RESCUED" WITH GRANT FUNDING

The Ouray Mountain Rescue Team was incorporated in 1974 to serve the technical rescue and emergency medical service needs of Ouray County and the surrounding mountain communities. The team is made up of 100% volunteers and services are free. For anyone who has recreated in our beautiful region and found themselves in a precarious situation, the rescue team is an essential service that responds 24/7 to calls. Montrose Community Foundation gave the organization a grant to help update their Rescue Barn, which was "functional, but not adequate".

Says one Montrose resident, "Can't express in words how appreciative I am to the wonderful rescue you performed hauling me off Bear Creek Trail after I ruptured my patella tendon! Everyone was so comforting and kind. Hopefully I'll never need you again but if ever I do, I hope you all are close by. Thank you from the bottom of my heart for all your work and dedication!"



Volunteers from the Ouray Mountain Rescue Team transport Montrose resident from Bear Creek Trail.

DAVID SAKSEK

Montrose Resident

We would like to thank our MCF Business Partners



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

BACK AT IT!

AFTER ALMOST TWO YEARS, MCF WAS FINALLY ABLE TO HOST FUNDRAISING EVENTS

Our events not only help raise money, but more importantly, give us an opportunity to get together with MCF friends and family.

In August, MCF was the designated charity for Alpine Bank's annual **Invitation Only Golf Tournament**. In April, we hosted 150 guests for our **Diner en Blanc**. The Colorado Outdoors Flex Space served as the surprise

venue where guests had a gourmet dinner, visited with friends, and danced the night away. In June, the Bridges hosted a record number of guests at the **Concert on the Lawn**. Over 1,500 concert goers braved the rain to support MCF and The Dolphin House. Their reward was an up close and personal performance from Big Head Todd & The Monsters and a spectacular rainbow.



Guests enjoying the DJ at our Diner en Blanc gala.



MCF Golf Team at the Alpine Bank Golf Invitational.



Generous Diner en Blanc Sponsors.



Concert goers enjoy an up close and personal performance by Big Head Todd & The Monsters.



Big Head Todd & The Monsters at The Bridges. Photo by Scotty Kenton

COMMUNITY AND FOUNDATION LEADER WILL BE MISSED

CURTIS ROBINSON'S BEGINNINGS WERE SIMILAR TO THE FOUNDATION'S —HUMBLE

Arthur "Curtis" Robinson was born and raised in the San Luis Valley of Colorado in a home with no running water and one woodstove. It was through the GI Bill that he was able to attend Western Colorado University to study business and accounting. At the age of 28, Curt earned his CPA and became a partner at Dalby, Wendland & Co.

In 1989, Curt helped fund the precursor to MCF, the Montrose Rotary Club Youth Foundation, as a vehicle to fund community projects. Curt's accounting and financial background was an invaluable asset to MCF and other nonprofit organizations that he was involved with. He set up financial statements, investment accounts and accounting practices. His touch is a part of everything that I do with the foundation - from our Articles of Incorporation to our tax returns and Thank You letters.

In an interview that I had with Curt in 2019 for an MCF 30th Anniversary video - he felt that the most important community project that the foundation had was the conservation of the Shavano Petroglyphs. In 2002, the Foundation purchased the land to conserve the ancient Ute art, then sold it to History Colorado so it could remain in conservation. Dating back to 1000 BC, Shavano Valley Site is considered

one of the premier rock art sites in Colorado and has been used to interpret cultural styles and traditions of other petroglyph sites in the region. It took great foresight (and some risk) to invest in the property. That investment paid dividends for the community.

Curtis helped so many Montrose projects come to fruition in the 50+ years he lived here, including *Cerro Summit, The Montrose Pavilion, Academic Booster Club, Rotary Scholarship Fund, MHS track and football field, Montrose Birthing Center, HopeWest Center for Hope, and more.*

I will miss seeing Curt at the Rotary meetings that he faithfully attended. Whenever we met to talk about MCF, he would always set up a time to meet with me as he preferred to have a face-to-face conversation. That is how Curt got things done - with personal connections, numbers that supported his case, true grit and a passion for helping others.

SARA PLUMHOFF
MCF Executive Director



Curtis Robinson, Volunteer ED, president and MCF Founder



Founders Steve Mathis (L), and Curtis Robinson (R)

THE COMMUNITY IMPACT FUND

FLEXIBLE AND POWERFUL FORM OF SUPPORT

Year after year, MCF has addressed our community's ever-changing needs through strategic grant making. Historically, these funds have come from a variety of sources: the earned income and dividends from our permanent endowment, City of Montrose Community Enhancement funds, grants from restricted funds, and other donations. **The MCF Board has identified raising unrestricted funds for community good as a priority.**

WHY? Because unrestricted funds allow the Foundation to use them where current (and often time sensitive) needs are greatest. 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).

As the Community Impact Fund grows, so does our ability to make strides towards addressing the root causes of local issues like affordable housing, agricultural initiatives, childcare, and access to healthcare and food.

PLEASE CONSIDER GIVING TO THE COMMUNITY IMPACT FUND TODAY. Or think about leaving a gift to the Community Impact Fund through your will or bequest. **Any size gift is appreciated and will be put out into the community for the future of Montrose.**

give
BACK

SCHOLARSHIP SUPPORTS THE FUTURE OF AGRICULTURE

IN PARTNERSHIP WITH MONTROSE COUNTY, MCF HELPED ESTABLISH THE MONTROSE COUNTY FUTURE FARMERS SCHOLARSHIP

This exciting, new scholarship is intended for those looking to pursue agriculture as a career and those involved in FFA (Future Farmers of America). Agriculture is a large part of heritage of this valley, and this scholarship helps keep the dream of agriculture alive.

The inaugural scholarships were presented at the 2022 Montrose County Fair to West End residents Keelee Redd and Joshua Alexander. Both recipients are Montrose County residents who have impressive

accomplishments, including a long list of agricultural achievements, academic merit, and community involvement.

The county pledges \$5,000 each year to fund two \$2,500 scholarships. Additional tax-deductible donations are welcome to help award another scholarship or increase the funds available for the two scholarships.

For more information or to donate, please visit montrosecf.org/apply-for-a-scholarship.



Bo Andrews and Katie Yergensen present the inaugural Future Farmers' Scholarship to J Alexander and K Redd.



"I start next month in my 4th and last semester of the nursing program and couldn't be more excited! School has been so great, and I am enjoying every part of it, but I couldn't do it without the help of you guys, so incredibly thankful for you."

-A COX

Ken & Marlene Townsend
Scholarship recipient (2018)

CONGRATS 2022 MCF SCHOLARSHIP RECIPIENTS!

LOCAL STUDENTS AND THE SCHOOLS THEY WERE ATTENDING WHEN THEY APPLIED

In order from left to right:

- ABBY, Doane University
- ASHLEY, Montrose HS
- AUBRIE, Olathe HS
- AUSTIN, Montrose HS
- BENJAMIN, North Fork HS
- BODE, Montrose HS
- BRENDAN B., Delta HS
- BRENDAN U., Montrose HS
- CODY, Western CO Community College
- DAKOTAH, Olathe HS
- DANIELLE, Colorado Mesa University
- EVELYN, Montrose HS
- GABE, Montrose HS
- HARRISON, Montrose HS
- JOSHUA, Norwood HS
- JULIA, Montrose HS
- KASSIE, Colorado Preparatory Academy
- KAYA, North Fork HS
- KEELE, Nucla HS
- LUKE, Montrose HS
- MADDISON, Peak Academy
- MADISON, Montrose HS
- MARIAH, Montrose HS
- MATTESON, Montrose HS
- OLIVIA, Cedaredge HS
- RAELEE, Delta HS
- SAMANTHA, Texas Christian University
- SARAH B., Olathe HS
- SARAH H., Montrose HS
- SAVANNAH, Montrose HS
- SIENNA, Vision Charter Academy
- SIERA, Montrose HS
- TANEYA, Montrose HS
- TESSA, Montrose HS
- BRIDGER, Montrose HS (not pictured)
- CORBIN, Montrose HS (not pictured)
- HUNTER, TCR (not pictured)
- JAGEN, Colorado School of Mines (not pictured)
- JACOB, IntelliTec (not pictured)
- SHOMARI, Western CO Community College (not pictured)
- VICTOR, Montrose HS (not pictured)



For a complete list of our scholarship funds please see page 9.

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 & Capital Campaign
- 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
- Western Slope Surgical Fund**

DONOR ADVISED FUNDS (DAF)

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

- Montrose Hardware Building Community Fund
- San Miguel Power Association DAF
- Western Slope Orthopaedics DAF
- Tom Wiard & Emily Schneider Fund
- Joe & Linda Sullivan Family Fund**
- Bob & Addie Tesch Fund**

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)
- Common Ground/Kid's Aid
- Helping Hand Fund
- Heroes 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 Youth Recreation Projects
- Montrose Youth Football League
- Olathe Sweet Corn Festival
- Shoes for Kids (Montrose Rotary)
- Substance Abuse Fund

SCHOLARSHIP FUNDS

- Ada & Luther White Memorial
- Automotive Enthusiasts
- Cobble Creek Men's & Women's Golf Association
- Delta-Montrose Electric Association (DMEA)
- Roy & Louis Faussonne
- Gilbert Family
- Tom Gilmore Memorial Law Enforcement
- Literature for Life
- Maxine Keller Memorial
- Montrose Chamber Ken Gale Memorial
- Montrose County Future Farmers Scholarship**
- Montrose Rotary Club
- Nick H Gray Memorial
- CWOA Richard Rozman Memorial
- Squint & Juanita Moore Archaeological
- Ken & Marlene Townsend



NEW! THE 2022 ANSWER BOOK

The *Montrose Daily Press* (Wick Communications), with the help of the MCF and Tri-County Health Network, published the **2022 Answer Book**, a guide to numerous local resources in Delta and Montrose. This handy resource guide lists contact information and short descriptions for regional organizations by the services they provide including: disabilities resources, dental, employment, family, food, health, housing, legal services, senior, support groups and more!

To order printed copies, we have created an online form that can be accessed from our website: montrosecf.org/community-resource-directory or, stop by our office to pick up a copy or two.



- A 10.5% HEALTH & WELLNESS
- B 9.0% RECREATION
- C 9.8% ARTS & LITERATURE
- D 12.7% BASIC NEEDS
- E 23.7% COMMUNITY DEVELOPMENT
- F 34.3% EDUCATION + SCHOLARSHIPS

MCF BALANCE SHEET

FISCAL YEAR ENDED JUNE 30, 2022

ASSETS	
Cash Equivalents	\$846,680
Investments	\$4,944,236
Other	\$950
Total Assets	\$5,791,866

LIABILITY	
Agency Funds	\$1,377,400

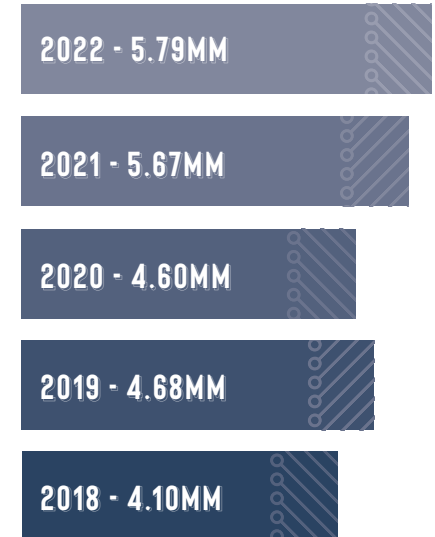
NET ASSETS	
Net Assets	\$4,414,465

TOTAL LIABILITIES & NET ASSETS: \$5,791,866

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.

ASSETS IN MILLIONS

FISCAL YEARS ENDING JUNE 30



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 Baldrige, 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 or monthly donations as **Baldrige Society Members**.

Sign up today!



Patron
\$750 PER YEAR
\$63 PER MONTH

Fellow
\$500 PER YEAR
\$42 PER MONTH

Friend
\$250 PER YEAR
\$21 PER MONTH

Benefits include: Invitations to MCF events, with permission, recognition in materials, news updates, unique community opportunities and more!



MONTROSE
COMMUNITY
FOUNDATION

525 E Main St.
Montrose, CO 81401

MCF BOARD OF DIRECTORS 2022



Laird Landon
President



Mark Smith
Vice President



Scott Wittman
Treasurer



Sarah Abbott
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Ian Atha



Meredith Fishing



David Frank



Carol Friedrich



Terry McCoige



Lynn Schneider



Vin Singh



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 MontroseCommunityFoundation