



*Report*



# Letter to our Donors

Dear Friends,

In 2004, the Community Foundation Serving Greeley and Weld County embraced many changes. We revised our mission statement, said good-bye to former staff and outgoing board members, said hello to new staff and new board members and watched our managed assets continue to grow. Throughout these changes, the Community Foundation’s core mission of bettering the communities we serve never wavered.

People have different reasons for becoming involved in their communities. It can be a way to give back to a place where one has flourished or to create a legacy for generations in the future. We welcomed new donors and celebrated our current donors who have continued to support the needs in Weld County. We worked with new funds to help burgeoning programs begin as nonprofit agencies.

Our foundation has been blessed with a committed core of people whose energies have never wavered. We are grateful for the leadership of our board, the expertise of our staff, the dedication of our committee members, the efforts of our volunteers and the support from local professional advisors in our communities.

The Community Foundation is proud to be a part of Weld County. We have grown as a trusted partner to individuals and families, helping them invest in causes they care about. It is indeed an honor to serve communities with generous, involved and dedicated residents. We invite you to take a moment to read about our accomplishments in 2004. And, on behalf of those who benefit from our grants and scholarships, we thank you for your contributions and support.

Sincerely,

Helen R. “Sissy” Dent  
Chairman

Judy Knapp  
President



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# Balance Sheets

December 31	2004	2003
<b>ASSETS</b>		
Cash	\$ 596,849	\$ 452,976
Certificates of deposit	300,000	-
<b>Receivables:</b>		
Contributions	8,291	44,125
Interest	37,596	44,208
Loans to students	45,723	55,783
Interfund loan receivable	70,000	70,000
Investments, at market	9,334,144	8,854,944
Office Furniture and Equipment, net	1,224	-
Other Asset	53,276	53,276
<b>TOTAL ASSETS</b>	<b>\$ 10,447,103</b>	<b>\$ 9,575,312</b>
<b>LIABILITIES AND NET ASSETS</b>		
<b>Liabilities:</b>		
Accounts payable	\$ 2,549	\$ 2,682
Grants payable	202,480	46,879
Gift Annuity payable	32,296	34,052
Accrued payroll liabilities	-	3,674
Interfund loan payable	70,000	70,000
Assets held for agency funds	735,480	649,166
<b>Total Liabilities</b>	<b>1,042,805</b>	<b>806,453</b>
<b>Net Assets:</b>		
Unrestricted (deficit)	(247,961)	(564,074)
Temporarily restricted	2,087,168	1,821,967
Permanently restricted	7,565,091	7,510,966
<b>Total Net Assets</b>	<b>9,404,298</b>	<b>8,768,859</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$ 10,447,103</b>	<b>\$ 9,575,312</b>

## Statement of Activities

	2004	2003
<b>Total Revenue</b>	\$2,101,209	\$1,857,352
<b>Total Expenses</b>	\$1,465,770	\$851,793
<b>Change in Net Assets</b>	\$635,439	\$985,596
<b>Net Assets (Beginning of Year)</b>	\$8,768,859	\$7,783,263
<b>Net Assets (End of Year)</b>	<b>\$9,404,298</b>	<b>\$8,768,859</b>

# New Funds for 2004

- Access and Ability Fund
- America's Foster and Adoptive Families Network Fund
- Anonymous
- Arts Alive! Scholarship Fund
- Lions Dictionary Project Fund
- Weld County School District Six Historical Preservation Fund



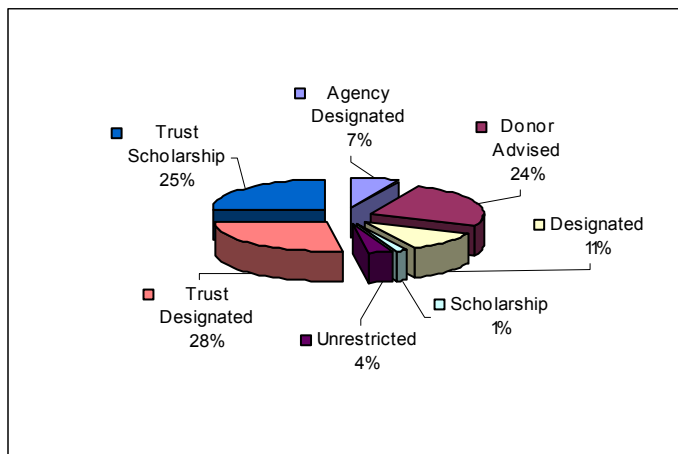
## Fund Highlight The Arts Alive! Scholarship Fund



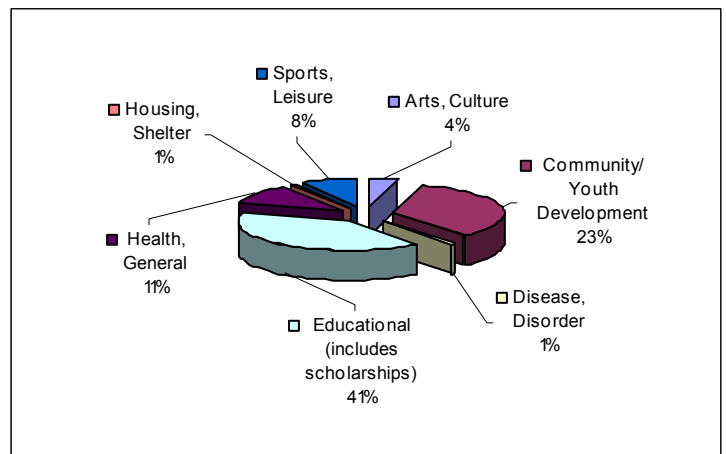
The Arts Alive! Scholarship Fund was established in 2004 to celebrate those whose spirit is expressed through the arts and to nurture human creativity in Greeley, Colorado. The purpose is twofold: to honor individuals for longtime commitment to the arts in Greeley, and to fund scholarships for graduates of Greeley high schools who are studying Music, Theatre, Dance or Visual Arts at the University of Northern Colorado or Aims Community College

The Fund allows for two scholarships of \$1,000 each. These awards may be used to cover actual tuition and fees at Aims Community College or the University of Northern Colorado. Awards will be made on the basis of **scholarship and specific interest or major**.

### Asset Analysis by Division



### Grants by Program Area





# Funds

## Designated Funds

"Friends of KUNC"  
 Access and Ability Fund  
 America's Foster & Adoptive Families Network Fund  
 Chernobyl Children's Fund of Colorado  
 Community Celebration  
 Greeley Lions Club  
 Greeley Rotary  
 Greeley Rotary W.D. Farr Endowment Fund  
 Houston Gardens  
 Immunization Coalition Fund  
 Jimmy's Park Fund  
 Latina Women  
 Leanna's Closet  
 Leoma D. Hunter Loan  
 Lions Dictionary Project  
 Littler Youth Funds  
 Living Powerfully  
 Migrant Christmas Fiesta Fund  
 Monfort Children's Clinic Endowment Fund  
 Monfort Home Project  
 NCMC Chaplaincy Fund  
 Peak View Jazz Fund  
 Platteville Community Foundation  
 Read Aloud Fund  
 Rotary Centennial Project  
 School District Six Sports Fund  
 Southeastern Community Outreach  
 Southeastern Weld Advocacy  
 Sunrise Neighborhood Center Fund  
 Teacher Excellence Program  
 Weld County Child Court Project  
 Weld County School District Six  
 Weld County School District Six Historical Preservation Fund  
 Weld County Sheriff's Equestrian Center Fund  
 West Greeley Rec Center Pool Expansion  
 Windsor Community Foundation Fund  
 Windsor Recreation Center

Winograd Business Professorship and Fellowship Fund

Winograd Elementary School Support  
 Women's Fund of Weld County

## Donor Advised Funds

Aaron Foundation  
 Anderson Family Foundation Fund  
 Anonymous  
 Arts Alive!  
 BillWinde Fund  
 Colorado Autism Foundation  
 Fort Lupton Area Community Fund  
 Greeley Rotary Silent Partners  
 Howard E. Smith Family Endowment Fund  
 Janklow Fund  
 John K. Jerome Family Fund  
 Johnston Charitable Fund  
 Lynne and Gladys Hopkins Family Fund  
 M.C. Widmaier Family Endowment Fund  
 Martin Family Endowment Fund  
 Nicholas Roehrich Memorial Fund  
 O'Neal Family Endowment Fund  
 R.L. Monfort Family Endowment Fund  
 Robert O. Schulze Memorial Fund  
 SasonsFund  
 Shadwick Family  
 Winograd Family Fund  
 Woolf Scholarship Fund

## Agency Designated Fund

A Women's Place Endowment Fund  
 Centennial Development Services, Inc.  
 Greeley/Weld Senior Foundation  
 Hospice Endowment Fund  
 Humane Society of Weld County  
 United Way of Weld County Legacy Endowment  
 Weld County Partners Endowment

## Scholarship Funds

"Doc" Patterson Scholarship Fund  
 Ag Scholarship Fund  
 Aragon Hispanic Student Fund  
 Arts Alive! Scholarship Fund  
 Helen McCandless Trust  
 Hispanic Women of Weld County  
 Leoma D. Hunter Trust  
 Mildred S. Hansen Trust  
 Weld County Builders Scholarship Fund  
 Winograd Greeley Central High School Scholarship

## Unrestricted Funds

Boettcher Fund  
 Community Trust Fund  
 Directors Fund  
 Greeley Parks & Recreation  
 Tribune Community Crisis Fund



*One of many Santas at the Migrant Christmas Fiesta Event.*



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# Mission Statement

## Ten reasons people choose to give through community foundations

### one

We are a local organization with deep roots in the community.

### two

Our professional program staff has broad expertise regarding community issues and needs.

### three

We provide highly personalized service tailored to each individual's charitable and financial interests.

### four

Our funds help people invest in the causes they care about most.

### five

We accept a wide variety of assets, and can facilitate even the most complex forms of giving.

### Six

We partner with professional advisors to create highly effective approaches to charitable giving.

### seven

We offer maximum tax advantage for most gifts under federal law.

### eight

We multiply the impact of gift dollars by pooling them with other gifts and grants.

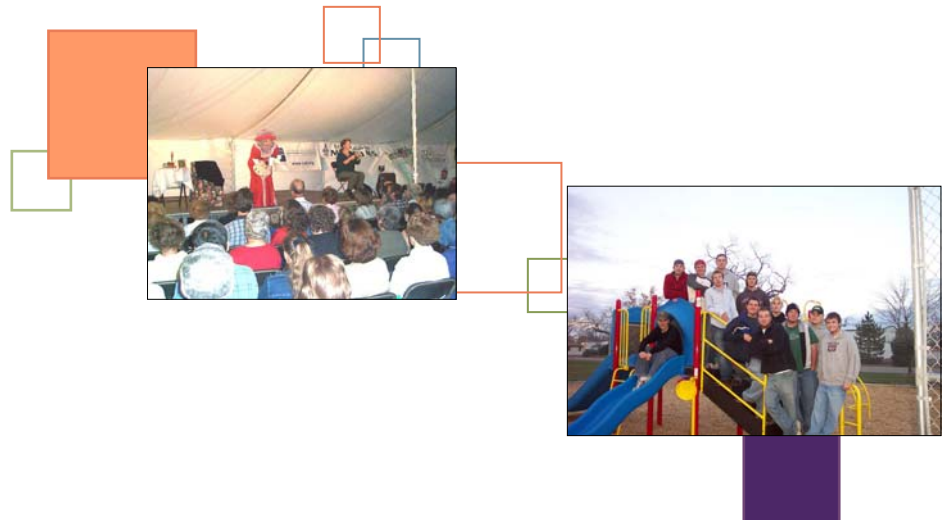
### nine

We build endowment funds that benefit the community forever and help create personal legacies.

### ten

We are a community leader, convening agencies and coordinating resources to create positive change.

*The mission of the Community Foundation Serving Greeley and Weld County is to facilitate the desires of donors in order to develop growing endowments which will serve to improve the quality of life in our communities.*



## Q & A

### What is a Community Foundation?

The Community Foundation Serving Greeley and Weld County is a nonprofit, community corporation created by and for the people of Weld County. We are here to help our donors make a positive impact.

Donors can give to an existing fund or establish a charitable fund at the Community Foundation by contributing a variety of assets. Those assets are then carefully invested by the Community Foundation. The gift principal never gets spent and the earnings are used to benefit the community through annual grants. Gifts to the Community Foundation will continue to grow and earn resources for the community forever.

### How are Foundation investments handled?

The Community Foundation has an Investment Committee made up of community leaders who advise the Board of Directors regarding investments issues, including the selection of professional managers. A formal Statement of Investment Policy has been adopted by the Board of Directors. The Investment Committee evaluates the performance of the professional managers on an annual basis.

If you would like more information about the Community Foundation's investment policy, professional managers, fees charged or individuals responsible for oversight, please contact us at (970) 304-9970 or [info@greeleyweldcomfound.org](mailto:info@greeleyweldcomfound.org).

Visit us on the Web!  
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