



The Community  
Foundation  
GREELEY AND WELD COUNTY



*Helping Good People Do Great Things*



2011 Community Report

# From Our Leadership

The saying “charity begins at home” is never more true than here in Weld County. Over 14 years ago, a small group of individuals established a local foundation for providing philanthropic gifts within the community. In the years that followed, countless numbers of individuals have contributed their time, talent and treasure to further the growth of this organization now known as the Community Foundation Serving Greeley and Weld County.

The Community Foundation helps good people do great things: donors who are compelled to give back to their community; nonprofits that provide critical lifelines to residents in need; and board and staff members who work tirelessly, listening, learning and making thoughtful decisions that positively impact our quality of life.

Behind all the work we do - behind every donor, behind every gift - are stories of help and support; stories of the gift of education; stories of arts and culture enriching our lives; stories of youth being given new opportunities; and stories of enhancing our region.

Over the past year, we’ve been taking a closer look at our mission, our core work, and where we are headed. The unique purpose of a community foundation is to build a permanent endowment that serves a specific place, while it supports and promotes philanthropy. With a growing endowment, a community foundation can respond to the changing needs of its community, serving each successive generation in a way that is meaningful for its time.

As we move forward, we will continue to increase awareness about the foundation and its unique contribution to Weld County, build permanent resources and forge partnerships with grantees and other funders to maximize our impact. By reaching out to contributors and prospective donors, we will help them invest with confidence in the causes they care about most.

To those of you who have entrusted your time, talent and treasure to the Community Foundation and its 125 funds, we thank you. Throughout this report, you will see examples of how your support is helping good people do great things throughout our community. The board and staff look forward to partnering with you to accomplish even greater things in the years to come.



*Charmaine Littlejohn*  
Board Chair



*Judy Knapp*  
President & CEO



# About Us

## HISTORY

In 1997, the Greeley Area Foundation and the Weld Community Foundation completed a merger to form the Community Foundation Serving Greeley and Weld County. It was the foresight of the founding board members to create a single entity that has since provided more than \$13 million in support to Weld County and other organizations over the past 14 years. Today, the Community Foundation has over 125 funds and assets of over \$11.5 million.

## OUR MISSION

The Community Foundation Serving Greeley and Weld County promotes philanthropy to build resources, develops partnerships, and provides leadership that will be of lasting benefit to our communities.

## OUR VISION

Our Vision is to identify collaborative solutions, opportunities and resources that inspire philanthropy to build a better future for the citizens of Weld County.

## GRANTMAKING

The Foundation awards most of its grants to 501(c)(3) nonprofit organizations to support projects and programs that benefit Weld County citizens, meet community needs and test new ideas. Annually, we award more than 200 grants ranging from a few hundred dollars to several thousand dollars. Some of our grant dollars are directed to specific areas of need, such as youth and arts programs. Other grant dollars are recommended by donor-advisors to support causes that matter most to them.

Because we know the local area, the Community Foundation can readily facilitate a donor's specific wishes, or help to put a donor in touch with innovative, effective organizations that the donor may not already know.

## STEWARDSHIP

We are stewards of donor dollars, ensuring that the wishes of our donors are met. Our diversified investment strategy is guided by our board and our investment committee.



# Financials

## Statement of Financial Position

December 31	2011	2010
<b>ASSETS</b>		
Cash	\$ 786,850	\$ 785,385
Receivables:		
Contributions	12,985	25,052
Interest	28,928	28,928
Loans to students	-	638
Interfund loan	24,000	26,000
Investments, at market	10,771,617	10,353,024
Office Furniture and Equipment, net	1,166	2,506
Equity in assets held by third party trustee	41,800	-
Other Asset	53,276	53,671
<b>TOTAL ASSETS</b>	<b>\$ 11,720,622</b>	<b>\$ 11,275,204</b>
<b>LIABILITIES AND NET ASSETS</b>		
Liabilities:		
Accounts payable	\$ 8,224	\$ 3,046
Grants payable	104,130	48,534
Interfund loan payable	24,000	26,000
Annuity obligation	63,265	87,332
Assets held for agency funds	645,267	654,282
<b>Total Liabilities</b>	<b>844,886</b>	<b>819,194</b>
Net Assets:		
Unrestricted (deficit)	103,696	86,743
Temporarily restricted	2,683,635	2,360,003
Permanently restricted	8,088,405	8,009,264
<b>Total Net Assets</b>	<b>10,875,736</b>	<b>10,456,010</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$ 11,720,622</b>	<b>\$ 11,275,204</b>

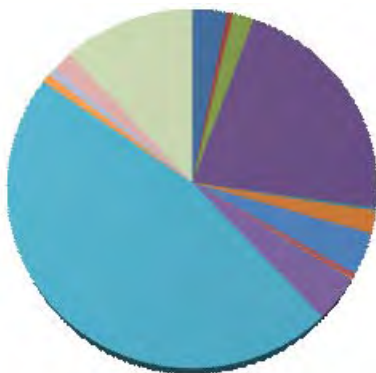
## Statement of Activities

December 31	2011	2010
Total Revenue	\$ 1,514,212	\$ 1,746,075
Total Expenses	\$ 1,094,486	\$ 1,084,183
Change in Net Assets	\$ 419,726	\$ 661,892
Net Assets (Beginning of Year)	\$ 10,456,010	\$ 9,794,118
Net Assets (End of Year)	\$ 10,875,736	\$ 10,456,010

Copies of the Community Foundation Serving Greeley and Weld County's IRS Form 990 and the current annual audit report are available for your review online at [www.cfsgwc.org](http://www.cfsgwc.org) or at our office by calling (970) 304-9970.

# At a Glance

## Grants by Distribution Area



- Arts & Culture, \$27,319
- Community Development, \$4,300
- Community Initiatives, \$16,594
- Educational, \$188,597
- Emergency Assistance, \$2,237
- Health & Nutrition, \$17,837
- Housing & Shelter, \$33,047
- Human Services, \$3,926
- Medical Research, \$500
- Nonprofit Support, \$36,250
- Program Support, \$405,521
- Religious, \$7,000
- Seniors, \$6,415
- Women & Girls, \$16,100
- Youth, \$103,358

**\$869,001**

Amount distributed in grants, scholarships and program support in 2011.

**125**

Number of funds at the CFSGWC in 2011

**\$13.1 million**

Grant, scholarship and program support provided since 1997

## New Funds in 2011

- Deb and Dan Austin Family Foundation Fund
- Embrace Northern Colorado
- Greeley/Evans Teacher Candidate Scholarship
- Jean Meyer Martin Scholarship Fund
- Judge Roger Klein Scholarship
- Robert and Judy Kron Family Fund
- Quality Student Tutoring/Teaching
- Edward Robert Rady and Edna Mae Rady Memorial Ag Scholarship
- Shadwick Family Fund
- Weld County Literacy Fund
- Weld County Veterans Memorial Fund
- Windsor Harvest Festival Scholarship

**\$11.72 million**

Total Assets as of 12/31/2011

**4.91%**

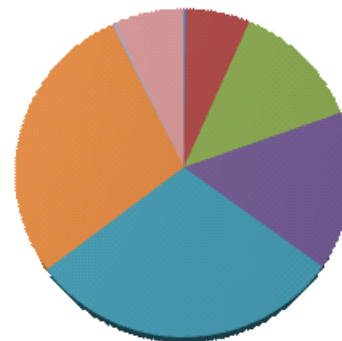
Total return on the Foundation's investments

**\$1,061,847**

Amount of contributions received by the Foundation in 2011.

## Asset Breakdown

- Affiliates, 0.25%
- Agency Designated, 6.32%
- Donor Advised, 12.96%
- Designated, 15.59%
- Field-of-Interest, 29.45%
- Scholarship, 28.24%
- Seed, 0.27%
- Unrestricted, 6.92%





# Funds at the

## Agency-Designated Funds

A Kid's Place Endowment  
A Woman's Place Endowment  
Book Trust-Greeley  
Catholic Charities Guadalupe Community Assistance Center Fund  
Embrace Northern Colorado Fund  
Envision Creative Support for People with Disabilities  
Greeley/Weld Senior Foundation  
Greeley Transitional House Endowment  
Meals on Wheels Endowment  
Monfort Children's Clinic Endowment  
NMC Chaplaincy  
United Way of Weld County Legacy Endowment

## Designated Funds

8th Street Company  
A Woman's Place Client Emergency  
Baca County Community Foundation  
Florence J. Berry Fund for the Platteville Museum  
BillWinde Fund  
Dr. Thomas R. and Janis S. Dunn Fund  
For Goodness Sake Fund  
Fort Lupton Community Foundation  
Fort Lupton Youth Recreation Fund  
Greeley Lions Club Fund  
Greeley Rotary Charitable Fund  
Greeley Rotary W.D. Farr Endowment  
Greeley Trails and Open Space Fund\*  
Dorothy E. Hood Endowment  
Houston Gardens Fund  
Immunization Coalition Fund  
Leanna's Closet Fund  
Lions Dictionary Project Fund  
Phyllis and Glenn McDonald Memorial Fund for the Performing Arts  
Migrant Christmas Fiesta Fund  
Robert and Lena Ochsner Fund  
Peak View Jazz Fund  
Quality Student Tutoring/Teaching Fund  
Rotary Centennial Project Fund  
Howard and Beverley Skinner Fund for the Greeley Philharmonic Orchestra  
Union Colony Civic Center Fund  
Union Colony Civic Center Unrestricted Endowment  
Weld County School District Six Fund

Weld County School District Six Historical Preservation Fund  
Windsor Community Foundation  
Winograd Business Professorship & Fellowship Fund

## Donor-Advised Funds

Aaron Foundation  
Anderson Family Foundation  
Anonymous  
Dick and Irene Boettcher Endowment  
Reva and Dick Bond Family Fund  
Bill and Sharon Farr Fund  
Thomas J. Gordon Endowment  
Gunderson Family Fund  
John K. Jerome Family Fund  
Johnston Charitable Fund  
Robert and Judy Kron Family Fund  
Living Waters Fund  
Martin Family Endowment  
R.L. Monfort Family Endowment  
O'Neal Family Endowment  
Gregory and Kathy Obermann Family Foundation  
Nicholas Roehrich Memorial Fund  
Shadwick Family Fund  
M.C. Widmaier Family Endowment  
Winograd Family Fund

\*Fund was retired in 2011



Robert (Rok) and Judy Kron established a donor-advised fund to support nonprofit organizations in Weld County and elsewhere. By creating a donor-

advised fund, the Krons have a convenient and flexible tool for giving that allows them to be personally involved in suggesting grant awards made possible by their fund. People with a wide range of community interests find that it's an ideal vehicle for fulfilling their charitable wishes.

# Community Foundation

## Field of Interest Funds

Arts Alive!  
Byron and Margaret Brown Endowment Fund  
Emmie's Hope Fund  
Evans Fire Safety and Assistance Fund  
Fort Lupton Arts Council  
Fort Lupton Trapper Days Roll In Fund  
Greeley Rotary Silent Partners  
Hometown Community Foundation  
Honor Flight Northern Colorado Fund  
Lauren Johnson Safe Environment Fund  
Littler Youth Fund  
Mayor's Golf Challenge Fund  
Norm & Marty Noe Family Leadership Incentive Fund  
Student Recovery Program Fund  
Success Foundation Serving Greeley-Evans Schools  
Tribune Community Crisis Fund\*  
Weld County Literacy Fund  
Weld County Veterans Memorial Fund  
Windsor Treasure Island Gardens Fund  
Women's Fund of Weld County

## Seed Funds

Deb & Dan Austin Family Foundation Fund  
Eldergarden Endowment Fund  
Greeley Area Masonic Fund\*  
Rotary Club of Windsor, CO Foundation  
Annessa Sanchez Memorial Fund  
Weld Food Bank Endowment Fund

## Scholarship Funds

Marselino "Eddie" Aragon Dollars for Hispanic Scholars Fund  
Arts Alive! Scholarship  
Sam Chuenchit Soccer Scholarship  
Deason Scholarship  
Fort Lupton Community Scholarship  
Judd K. Fulton Memorial Scholarship  
Lucile J. Gray Scholarship  
Greeley/Evans Teacher Candidate Scholarship  
Betty and George Hall Family Scholarship Fund  
Mildred S. Hansen Scholarship  
Kathy Hanson Memorial Scholarship  
Hispanic Women of Weld County  
Lynne and Gladys Hopkins Family Scholarship  
Leoma D. Hunter Educational Fund

Alison Jenkins Memorial Scholarship  
Judge Roger Klein Scholarship  
Kristopher G. Mansfield Memorial Scholarship  
Jean Meyer Martin Scholarships  
Carl Mason Family Agriculture Scholarship  
Helen McCandless Scholarship  
Nauta Annual Scholarship  
"Doc" Patterson Scholarship  
Peschel Memorial Scholarship

## Jean Meyer Martin Scholarships

The Jean Meyer Martin and Continuing Ed. Scholarships were established in 2011 in memory of Jean Meyer Martin. In 1962 she co-founded the Greeley P.E.O. Chapter EZ and held several offices during her 50-year membership. The Jean Meyer Martin

Scholarship is for graduating female seniors from Weld County. The Jean Meyer Martin Continuing Ed. Scholarship is for young women from Weld County who are working toward the completion of a two-year degree or vocational/technical certificate program.



Edward and Edna Rady Memorial Ag Scholarship  
Dr. John A. & Patricia C. Rosales Memorial Scholarship  
SasonsFund  
Highland Community/R. Lee and Rebecca Seward Education Fund  
Weld County Builders Association Scholarship Endowment  
Weld County Builders Scholarship  
Windsor Harvest Festival Scholarship  
Winograd Greeley Central High School Scholarship  
Woolf Scholarship

## Unrestricted Funds

Boettcher Fund  
Community Trust Fund  
Directors Fund  
Impact Fund  
Howard E. Smith Family Endowment

# Promoting Philanthropy

People don't give to the Community Foundation but through us to support the causes they care about. We work hard to make giving easy and meaningful for donors and the causes that matter to them by:

- Accepting a wide variety of gift types and types of funds
- Providing easy set-up and administration of each fund
- Involving you personally
- Sharing our community needs expertise
- Endowing funds so that your charitable wishes create a permanent legacy

## Centennial Society

### Investing today...for a better tomorrow

The Centennial Society was inaugurated in 2006 by the Community Foundation's Board of Directors. It is a means to recognize and thank those people who share the Foundation's vision for building permanent charitable capital, and who have affirmed that vision by making a planned gift to the Community Foundation.



### Centennial Society Members

- |                            |                             |
|----------------------------|-----------------------------|
| Anonymous (10)             | Mary and Hubert Littler*    |
| Dan and Deb Austin         | Tom and Barb Macgillivray   |
| Dick and Reva Bond         | Sandy Magnuson              |
| Byron and Margaret Brown   | Helen C. McCandless*        |
| Col. and Mrs. Stanley Cass | Glenn McDonald*             |
| Charles "Chuck" Childers*  | Pete and Jean Morrell       |
| Nelle and William Deason*  | Norm and Marty Noe          |
| Bill and Sharon Farr       | Ken Norem                   |
| Mary Gillespie*            | Edna Rady                   |
| Tom and Nona Gordon        | R. Lee and Rebecca Seward   |
| Lucile J. Gray*            | Jim and Pam Shaddock        |
| Jerry Gress*               | Howard and Beverley Skinner |
| George and Betty Hall      | Howard Smith*               |
| Mildred Hansen*            | Pat Sprock                  |
| Bill and Theresa Hertneky  | Scott and Pat Thomas        |
| Gladys Hopkins*            | Florence Winograd           |
| Phylabe Houston*           |                             |
| Leoma Hunter*              | *Deceased                   |

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Dan and Deb Austin established a seed fund to support their charitable giving. Much like planting an acorn to grow an oak tree, seed funds allow donors to start a fund and gradually build upon it to create an endowment. The fund will allow the Austin's to support the charities or causes they recommend and will forever have an impact on the quality of life in our community.

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In her husband's honor, Edna Rady established two funds that will benefit from her estate. The Edward Robert Rady and Edna Mae Rady Memorial Agriculture Scholarship Fund will assist students from Weld County who have been involved in agriculture. The Weld County Veterans' Memorial Fund will support maintenance and improvements to the Weld County Veterans' Memorial at Bittersweet Park in Greeley.





# Developing Partnerships

For nearly 15 years, hundreds of Weld County residents have turned to the Community Foundation to make their charitable giving as effective and meaningful as possible. We provide not just expertise and resources about charitable giving and its benefits to both our community and the donor, but also a keen and ongoing knowledge about the needs of the Weld County region.

We work in a customized way with each individual, family, community group or organization. Everyone has different needs. Everyone has different passions. We make them a reality by working with our donors one-on-one to ensure the most positive and rewarding experience possible.

## Fiscal Sponsorship

The Community Foundation acts as a fiscal sponsor for a project or group that does not have its own tax-exempt status. Funds of this type allow community-minded individuals or organizations who have developed community-focused projects to meet charitable needs in the community and the ability to seek grants and solicit tax-deductible donations under the Community Foundation's tax-exempt status. The types of projects eligible to participate in the Community Foundation's Special Project/Pass-Through Fund Program are those which probably would qualify for tax-exempt status under 501(c)(3) of the Internal Revenue Code.



John and Joanne Lepetit established the Quality Student Tutoring/Teaching (QST) Fund to help students reach academic success through individualized tutoring/teaching. QST sets the conditions for success by getting to know the students, knowing their primary learning modes, using effective instructional techniques, building

positive relationships and positive attitudes toward learning.

The Weld County Literacy Fund was established by dedicated community members to help literacy providers implement new services (or maintain existing services) including, but not limited to, classes, books and supplies, and assessment tools to adult learners and family literacy programs. It may also help the larger community become aware of literacy issues and take a step toward advocating for a strong, thriving and literate Weld County.



Embrace Northern Colorado (ENC), a nonprofit organization focused on regionalization, established a Pass-Through Fund to increase their presence

in Weld County. The goal of ENC is to convene a joint process to move our regional community forward. They will examine the future of Northern Colorado through a phased collaborative approach to understanding, analyzing and discussing the challenges and opportunities facing the regional community.

# Providing Leadership

We see “community” as more than a geographic locale. It is an idea that exists in the minds of people who share common hopes and fears. Residents of Weld County come from different backgrounds, cultures and walks of life. In our daily lives we may not have many opportunities to meet people who aren’t our neighbors, co-workers or friends. However, we must realize that we are more the same than we are different. Our power as a community comes from working together to achieve goals that are important to all of us.

The Community Foundation accepts its role of leadership in the region and seeks to define what unites us and to bridge what divides the people of Weld County. Rich and poor, old and young, generations of families and first-generation American families, the Community Foundation unites people to achieve common goals and to provide a better life for all. We connect people who care with causes that matter.

## CommUnity: Board Leadership



As a leader and partner in the Weld County nonprofit community, we understand the challenges and needs of the agencies in our region. At the top of that list is having a strong, informed and committed board of directors. While most nonprofits budget for professional development for staff, little if any is set aside for board development.

We looked at this issue proactively by creating a series of sessions that offered board training to people who may not have served on boards before or were beginning their nonprofit board experience. This continued the work that was started through our initial CommUnity series by offering sessions that focused exclusively on board member training. Not only did this strengthen and expand their role as a board member initially, the board training they received will benefit future agencies where they may also serve.



## Fill ‘er Up! Refueling Yourself



Thanks to a grant from the Gay and Lesbian Fund for Colorado, the Community Foundation hosted a workshop on the power of laughter. Individuals from nonprofits across Weld County, as well as board members and volunteers, laughed until they cried at the humor workshop presented by Cynthia J. Geissinger. Fun was had by all as Ms. Geissinger spoke animatedly about laughter’s infinite value and the importance of Eustress instead of Distress in our lives.

*“In a time where we constantly feel under pressure and over-stressed, a morning of fun and laughter is exactly what we needed.”*

*- Workshop Attendee*

# Benefiting Our Communities

The Community Foundation raises, manages and administers an endowment and collection of funds for the benefit of the community. We use our earnings to support a program of college scholarships for area residents and grants to nonprofit organizations to improve our community's quality of life.

The Foundation's role in the community goes beyond grants and scholarships. We bring people together to discuss local community problems and work to find creative solutions. And we work to help donors achieve their charitable objectives now and for generations to come.

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## Investing in Deserving Students



Each year, the Greeley Education Association (GEA) provides scholarships to Greeley/Evans high school seniors who plan on majoring in Education. A pass-through fund was established to help support the charitable activities of the GEA and enhance the scholarship opportunities for local students.

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The Windsor Harvest Festival Scholarship was established as a way to give back to the community that supports the festival. Starting back from when the first paved road in Windsor was created, the Windsor Harvest Festival has been alive for 90 years. The scholarship is used to help with the cost of continuing education when the student leaves Windsor High School, thus continuing the 90 year tradition of giving back to the community.



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## Building a Legacy



Gerald and Jeannine Shadwick established a donor-advised fund, and in doing so, enjoyed the highest level of charitable tax benefits. Their donation is invested according to our investment philosophy to protect principal, generate current income, and ensure capital growth. They will now be able to recommend grants from their fund to support charitable organizations locally or nationally.

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*There's so much more we'd like you to know. Your community foundation provides the flexibility to help people meet a broad range of needs through a variety of vehicles. We welcome the opportunity to work with you and your advisor to fulfill your charitable objectives and community interests.*

# Faces of the Foundation



2011 Executive Committee

The Community Foundation is made up of tremendous leaders. They are our volunteers, our contributors, our Board of Directors, our staff. They are those who give of themselves so that we can continue to enhance life in our outstanding region. The volunteers at the Community Foundation are a diverse group of dedicated individuals, each bringing their own skills and expertise to enhance our work. They are part of everything we do. They oversee investment strategies, review scholarship and grant applications, advise on policies and procedures and create relationships. We are humbled by their ongoing and deep commitment, and we thank them for their tireless efforts on our behalf.

## Staff

Twyla Coblentz  
Finance Officer

Judy Knapp  
President

Lauren Weber  
Program Officer

## Board of Directors

Matt Anderson  
Randy Bangert  
Nick Berryman, Treasurer  
Karen Burd, Vice Chair  
Charmaine Coppom, Chair  
Wes Goehring  
Betty Hall, Secretary  
Heidi Klepper

Lee Korins  
Stephanie McCune  
Bill Meier  
Mike Payne  
Desiree Sandoval  
R. Lee Seward, Past Chair  
Bill Shade  
Tim Ulrich

## Contact Us

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Website: [www.cfsgwc.org](http://www.cfsgwc.org)



Support the Community Foundation or any of our funds by donating online.



Become a fan of the Community Foundation  
Serving Greeley and Weld County



*We are a 501(c)(3) nonprofit organization.  
Donations may be tax deductible to the fullest extent allowed by law.*