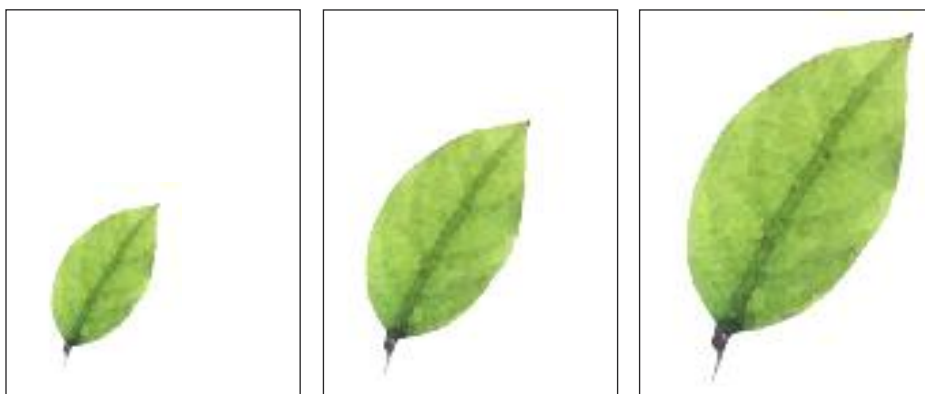




# The Community Foundation

GREELEY AND WELD COUNTY



2012 ANNUAL REPORT

## A LETTER FROM THE BOARD AND PRESIDENT

It is with great pride that we celebrate the Community Foundation Serving Greeley and Weld County's 15th Anniversary. Working with our donors, nonprofits, board members, volunteers and staff has been essential in bringing people together to build resources that ensure our communities will continue to be a special place to live and work.

As we reflect on the past 15 years and the milestones that have been part of the Community Foundation's history, we are extremely humbled by the generosity and the hard work of so many in the community who have made dreams become realities. It has truly been the support of the community and the leadership and dedication of the Board of Directors that has helped the Community Foundation grow to more than \$13 million in assets.

In this report we share a brief overview of how together with our donors, we realize dreams. These people are a testament to the many opportunities that are possible when generosity and collaboration are combined. We hope you'll be inspired by so many who want the best for the citizens of our community.

We look to the future of the Community Foundation with great anticipation as we continue to commit to our mission of promoting philanthropy to build resources, developing partnerships and providing leadership that will be of lasting benefit to our communities. The Foundation Board and Staff are grateful for the trust and confidence of our donors, our nonprofit community and our many partners.

It is with immense gratitude that we join with you in celebrating this 15th Anniversary. We look forward to a bright future full of growth and vitality!



Judy Knapp, President



Karen Burd, Board Chair



### 15 Years At-A-Glance

1997

The Greeley Area Foundation and the Weld Community Foundation merged. (25 funds, \$7,924,572 in assets).

1999

Sale of Smith residence and establishment of Howard E. Smith Family Endowment Fund.

## CENTENNIAL SOCIETY: A LASTING LEGACY

On July 18, 2012, the Community Foundation hosted its annual Centennial Society event at the home of Rick and Karen Burd. Nearly 50 guests enjoyed a warm summer evening while learning about how we can all leave a lasting legacy.

The Centennial Society was created to recognize individuals who have shared the Community Foundation's dedication to our community. It is open to anyone who designates a planned gift provision to benefit the Community Foundation. The provision can be made in many different ways including:

- Making a bequest to the Community Foundation in a will or revocable trust
- Making the Community Foundation a beneficiary of an IRA or other retirement plan
- Making a life income gift agreement such as a charitable remainder trust, charitable lead trust or charitable gift annuity
- Making the Community Foundation the owner of a paid-up life insurance policy or the beneficiary of a life insurance policy

### Current members include:

Anonymous (10)	Leoma Hunter
Dan and Deb Austin	Mary and Hubert Littler
Dick and Reva Bond	Tom and Barb Macgillivray
Byron and Margaret Brown	Sandy Magnuson and Ken Norem
Col. and Mrs. Stanley Cass	Helen C. McCandless
Charles "Chuck" Childers	Glenn McDonald
Nelle and William Deason	Pete and Jean Morrell
Bill and Sharon Farr	Norm and Marty Noe
Mary Gillespie	Edna Rady
Tom and Nona Gordon	R. Lee and Rebecca Seward
Lucile J. Gray	Pam and Jim 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	

If you are in the process of making or revising your estate plan, please consider making a gift for your community's future through the Community Foundation. We hope you will let us know of your gift and the decision to include the Community Foundation in your estate plans.



Becky Seward, Cecily Cass



Reva Bond, Marty Noe



Tom Gordon, Judy Knapp, Nona Gordon



Beth Bashor, Karen Goehring

2000

Celebrate 25 years since the Greeley Area Foundation was established.

2001

The Fort Lupton Community Fund and the Windsor Community Foundation Fund were established as affiliate funds.

## DONOR PROFILE: BETTY HALL

Watching Betty Hall interact on the scholarship committee, one would never guess that she was once apprehensive about walking through the door. “They were all professionals and seemed to know what they were doing.” Now Betty is the one the others turn to when a hard decision on worthy scholarship applicants has to be made. Betty is the one that other committee members ask about logistics and procedures. She is trusted and that trust is well deserved.

Betty Hall likes to describe herself as the “behind the scenes” worker. And oh boy, what she has accomplished behind those scenes. More than 50 years of Betty’s life has been spent in educational volunteerism and political activism. Seven of those years have been generously given to the Community Foundation Serving Greeley Weld County. As a board member and volunteer, Betty soon became involved with scholarship committee work, deriving great pleasure out of the process of sifting through amazing student applicants and awarding so many of them with scholarship dollars. She also served on the Executive Committee for a two-year term and another half a year filling in for an exiting member.

Loving and devoted is how to clarify Betty’s relationship with her seven grandchildren and two great-grandchildren. So much so that Betty and her husband George decided to extend their service and begin a scholarship fund of their own. She describes it as, “we felt an obligation to our community and we believed in supporting the Community Foundation organization in this manner.” Betty is serving her last term on both the scholarship committee and the Littler Youth Fund committee in 2013. She will be missed, yet the Betty J. & George W. Hall Scholarship Fund will remain for years to come. “It’s an accessible legacy for us” concludes Betty.



The Halls were selected by the Longs Peak Council Boy Scouts as the Weld Distinguished Citizens in 2001 and served as Grand Marshals for the 81st annual Greeley Independence Stampede. George and Betty have three children, seven grandchildren and two great-grandchildren.

2001

A group of community volunteer’s est. a fund with CFSGWC and raised \$2 million in 20 days to purchase KUNC’s (public radio) license.

2003

A total of \$5 million in cumulative grants, scholarships, and charitable program support distributed since 1997.

2004

Judy Knapp hired as President of CFSGWC.

# FUND LIST

## AGENCY-DESIGNATED

A Kid's Place Endowment Fund  
 A Woman's Place Endowment Fund  
 Book Trust-Greeley  
 Envision Creative Support for People with  
 Developmental Disabilities  
 Greeley Transitional House Endowment Fund  
 Greeley/Weld Senior Foundation, Inc.  
 Meals on Wheels Endowment  
 Monfort Children's Clinic Endowment Fund  
 NCMC Chaplaincy Fund  
 United Way of Weld County Legacy Endowment  
 Weld Food Bank Endowment

## DONOR-ADVISED

### ANONYMOUS

Anderson Family Foundation Fund  
 Deb and Dan Austin Family Foundation Fund  
 Dick and Irene Boettcher Endowment Fund  
 Reva and Dick Bond Family Fund  
 Bill and Sharon Farr Fund  
 Thomas J. Gordon Endowment  
 Gunderson Family Fund  
 Hertneky Charitable Fund  
 Johnston Charitable Fund  
 Robert and Judy Kron Family Fund  
 Living Waters Fund  
 Loustalet Family Fund  
 Martin Family Endowment Fund  
 R.L. Monfort Family Endowment Fund  
 Gregory and Kathy Obermann Family Foundation  
 O'Neal Family Endowment Fund  
 Nicholas Roehrich Memorial Fund  
 Shadwick Family Fund  
 M.C. Widmaier Family Endowment Fund

## DESIGNATED

A Woman's Place Client Emergency Fund  
 8th Street Company Fund  
 Baca County Community Foundation  
 Florence J. Berry Fund for the Platteville Museum  
 Fort Lupton Community Foundation Fund  
 Bill Winde Fund  
 Dr. Thomas R. and Janis S. Dunn Fund  
 Embrace Northern Colorado  
 For Goodness Sake Fund  
 Fort Lupton Youth Recreation Fund  
 1963 GHS Reunion Fund  
 Guadalupe Community Assistance Center Fund  
 Dorothy E. Hood Endowment Fund  
 Houston Gardens  
 Immunization Coalition Fund  
 Greeley Lions Club Charitable Fund

Lions Dictionary Project  
 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  
 Greeley Rotary Community Service Fund  
 Rotary Centennial Project  
 Greeley Rotary W.D. Farr Endowment Fund  
 Howard and Beverley Skinner Fund for  
 the Greeley Philharmonic Orchestra  
 Union Colony Civic Center Unrestricted  
 Endowment Fund  
 Union Colony Civic Center Fund  
 Weld County School District 6 Historical  
 Preservation Fund  
 Weld County School District Six Endowment  
 Windsor Community Foundation Fund  
 Winograd Business Professorship and  
 Fellowship Fund  
 Winograd Family Fund

## FIELD OF INTEREST

Aaron Foundation  
 Arts Alive!  
 Boettcher Fund  
 Byron and Margaret Brown Endowment Fund  
 Committee to Support Education in Greeley/Evans  
 Emmie's Hope Fund  
 Evans Fire Safety and Assistance Fund  
 Fort Lupton Arts Council  
 Fort Lupton Trapper Days Roll In  
 The Hometown Community Foundation  
 Greeley/Evans Teacher Candidate Scholarship  
 Honor Flight Northern Colorado  
 Littler Youth Fund  
 Lauren Johnson Safe Environment Fund  
 Mayor's Golf Challenge  
 Norm and Marty Noe Family Leadership  
 Incentive Fund  
 Greeley Rotary Silent Partners  
 Student Recovery Program - Greeley Central  
 Success Foundation Serving  
 Greeley-Evans Schools  
 Weld County Literacy Fund  
 Weld County Veterans Memorial Fund  
 Windsor Treasure Island Gardens  
 Women's Fund of Weld County

## SEED

Annessa Sanchez Memorial Fund  
 Eldergarden Endowment Fund

Rotary Club of Windsor, Colorado  
 Foundation Fund  
 Sexual Assault Victim Advocate Center  
 Warde Seed Fund

## SCHOLARSHIP

Marselino "Eddie" Aragon Dollars for  
 Hispanic Scholars Fund  
 Arts Alive! Scholarship  
 Carl Mason Family Agriculture Scholarship Fund  
 Sam Chuenchit Soccer Scholarship  
 The Deason Scholarship Fund  
 "Doc" Patterson Scholarship Fund  
 Fort Lupton Community Scholarship Fund  
 Floyd E. Acre Memorial Scholarship  
 Judd Kazuto Fulton Scholarship Fund  
 Lucile J. Gray Scholarship Fund  
 Betty J. and George W. Hall Family Fund  
 Mildred S. Hansen Scholarship  
 Kathy Hanson Memorial Scholarship  
 Hispanic Women of Weld County  
 Leoma D. Hunter Educational Fund  
 Alison Jo Jenkins Memorial Scholarship Fund  
 John K. Jerome Family Scholarship Fund  
 Judge Roger Klein Scholarship  
 Lynne and Gladys Hopkins Family Fund  
 Kristopher G. Mansfield Memorial  
 Scholarship Fund  
 Jean Meyer Martin Scholarship Fund  
 Helen McCandless Scholarship  
 Nauta Annual Scholarship Fund  
 Peschel Memorial Scholarship Fund  
 Edward and Edna Rady Memorial Ag Scholarship  
 Dr. John A. and Patricia C. Rosales  
 Scholarship Fund  
 Roger Rosenbrock Memorial Scholarship Fund  
 Sason's Fund  
 R. Lee and Rebecca Seward Education Fund  
 G. E. Wood Memorial Fund  
 Weld County Builders Association  
 Scholarship Endowment Fund  
 Weld County Builders Scholarship Fund  
 Windsor Harvest Festival Scholarship  
 Winograd Family Scholarship Fund  
 Woolf Scholarship Fund

## UNRESTRICTED

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

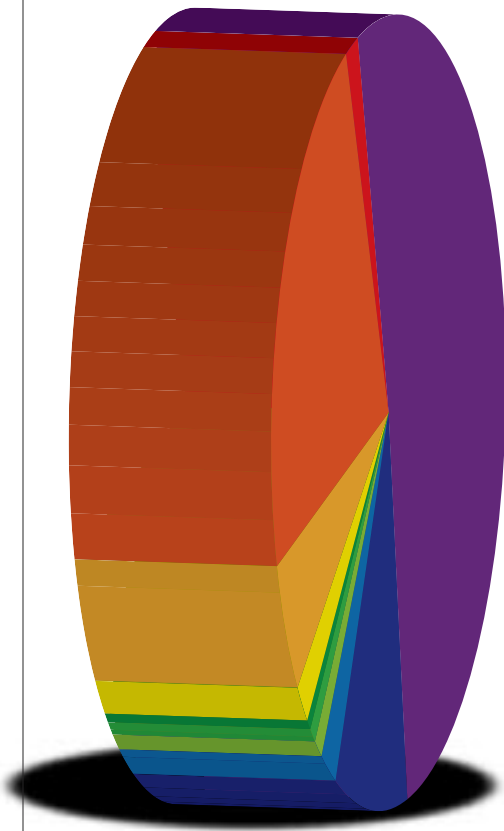
2006

2008

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

May 22nd: the E-3 Weld County tornado - over \$630,000 was raised to support recovery efforts.

# FINANCIAL



## DISTRIBUTION BY PROGRAM AREA

Arts/Culture and Community Development	\$16,720.00	1.84%
Education	\$217,730.56	24.00%
Emergency Assist., Environment, Housing, Health & Nutrition	\$53,289.62	5.87%
Nonprofit Support (including CommUnity)	\$19,441.37	2.14%
Medical Research	\$4,400.00	0.50%
Religious	\$8,150.00	0.90%
Seniors	\$9,107.00	1.00%
Women and Girls	\$21,100.00	2.32%
Youth	\$89,871.82	9.90%
Charitable Program Support	\$467,745.55	51.53%
<b>Total Including Agency distributions of \$23,971</b>	<b>\$907,555.92</b>	<b>100.00%</b>

**\$907,556**

Total Amount of Distributions  
in Grants, Scholarships  
and Program Support in 2012

**\$1,799,473**

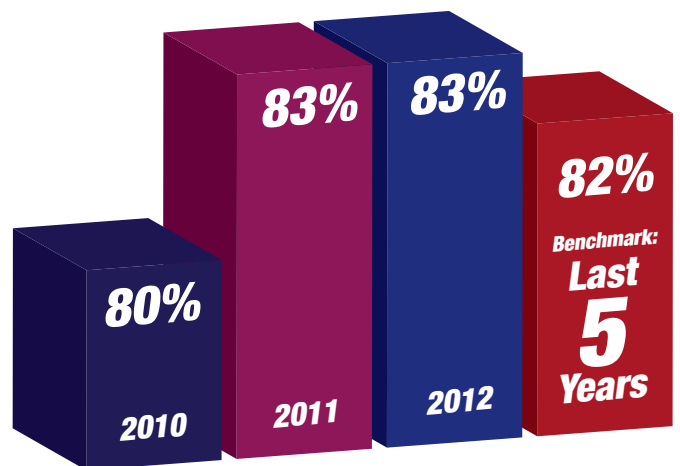
Total Amount of Contributions  
Received in 2012

**133**

Total Funds

## PROGRAM EFFICIENCY

Program Service Expenses vs. Total Expenses  
(Comparison to Community Foundations in the  
American West with revenues between \$1m-\$10m\*)



\*Benchmark information through Sageworks Industry Data and Analysis

2008

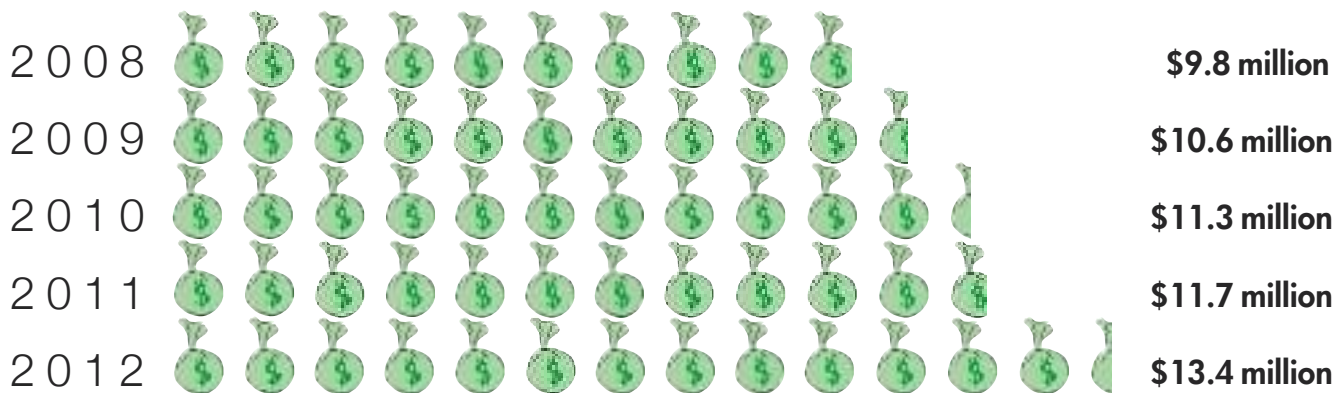
Mildred Hansen Scholarship Fund marks giving over \$1M in scholarships to 288 students.

2009

Littler Youth Fund celebrates 100th distribution (was established in 1972 by Hubert and Mary Littler for the benefit of youth in Weld County. It had granted over \$2.4 million since 1972).

# FINANCIALS

## FIVE YEARS OF IMPACT AND GROWTH Total net assets and liabilities



## STATEMENT OF FINANCIAL POSITION As of December 31, 2012

### Assets:

Cash, cash equivalents and Investments at fair value	\$13,230,500
Receivables	\$66,277
Equity in assets held by third party trustee	\$41,800
Other Assets	\$55,762
<b>Total Assets</b>	<b>\$13,394,339</b>

### Liabilities and Net Assets:

Current liabilities	\$61,348
Annuity and other obligations	\$83,563
Assets held for Agency Funds	\$858,877
<b>Total Liabilities</b>	<b>\$1,003,788</b>

### Net Assets

Unrestricted	\$150,840
Temporarily restricted	\$2,980,146
Permanently restricted	\$9,259,565
<b>Total Net Assets</b>	<b>\$12,390,551</b>

**Total Liabilities and Net Assets**      **\$13,394,339**

*The Community Foundation receives an annual audit. The 2012 audit is available at [www.cfsgwc.org](http://www.cfsgwc.org)*

**2010**

CommUnity workshops implemented to help nonprofits build their capacity to carry out their important missions.

**2012**

15th anniversary of CFSGWC and merger of foundations in 1997 (133 funds, \$13.4m in assets.)



### **Community Foundation Staff**

Twyla Coblentz – Finance Officer

Judy Knapp – President

Lauren Weber – Program Officer

### **Board of Directors**

Matt Anderson

Randy Bangert

Beth Bashor

Nick Berryman

Karen Burd

Charmaine Coppom

Wes Goehring

Heidi Klepper

Lee Korins

Stephanie McCune

Bill Meier

Mike Payne

Tim Ulrich

Rob Waldo

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 Facebook/  Twitter-@CommFoundGWC

The Community Foundation is a 501c3 nonprofit organization.  
Your contributions may be tax-deductible as allowable by law.

### **Annual Report**

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