



# Foundation Focus

## 2019 Board Members

### Executive Team

- Suzanne Harrison, President**
- Mike French, Vice President**
- Debbie Pfeifer, Secretary**
- Bill Young, Treasurer**
- Kathleen Adams, Past President**

### General Membership

- Gabrielle Dorr**
- Anne Finney**
- Melissa Glick**
- Margie Deane Gray**
- Mike Hudson**

### Non-Board Committee Members

- Debbie Campbell**
- Bryan Dear**
- Chuck Fredrick**
- Dick Griffith**
- Jan Johnson**
- Michelle Kooi**
- Diane Levison**
- Amy Moody**
- Katie Ogier**
- Sherry Phillips**
- Steve Phillips**
- David Smiley**
- Lauren Ziesel**

### Staff

- Briggen Wrinkle, Executive Director**
- Erin McGuinness, Finance & Operations Director**
- Tracy Pope, Marketing & Grants Manager**

## Suzanne's Summary

What a year — and we're only half way through!

### New Vision

As part of our Board's ongoing efforts to develop strategy, early this year we sharpened our pencils to define a new vision statement to guide our work over the next few years:

*"We envision a generous, vibrant and inclusive Southwest Colorado with opportunities for all to thrive!"*

### It's our Anniversary!

This year marks the 20th Anniversary of the Community Foundation serving Southwest Colorado. While 1999 seems like a long time ago, the time has flown since the Foundation started with a single \$25,000 donor advised fund. Asset growth has been sure and steady ever since. As of the end of 2018, the Foundation's net assets exceeded \$5,110,000, while maintaining high impact in the community and very low operating expenses.

Our purpose is to facilitate the growth and effectiveness of philanthropic contributions and expand the culture of giving to meet the needs of the five counties of Southwest Colorado.



Suzanne Harrison,  
Board President

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## Impact Investing Circle Start Up

Please join me and Bill Young, CFO of First SW Bank (FSWB) and Treasurer of the Community Foundation Board, to discuss starting an Impact Investing Circle. What that means is we will bring together a group of philanthropists who want to start a fund (minimum \$10,000 per investor) that would be used as seed money for a bridge loan, capital project or an emergency response loan. We are partnering with other Foundations and First SW Bank to structure deals that will ensure nonprofits have the resources needed to succeed.



Briggen Wrinkle,  
Executive Director

If you think about it, grants are a negative 100% investment. You grant money to nonprofits and poof, it's gone. This is a new way to apply your philanthropic dollars. Impact Investing can offer financial solutions to the nonprofit sector, while funders can expect a return, even if it is just principal paid back. There is a return on investment, creating a revolving fund. Impact Investing provides nonprofits capital that has more flexible terms than what they could get from traditional banks.

For example, let's assume a nonprofit has been renting space for several years and the opportunity to purchase the building occurs. Several factors are in play with such a decision:

- Money for a down payment – usually 20% of the purchase price
- Cashflow for monthly principal and interest payments on the loan
- Reluctance on the part of the current board of directors to obligate future boards for loan payments, especially any balloon payments on conventional commercial mortgages

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# Grantmaking

The Community Foundation envisions a generous, vibrant and inclusive Southwest Colorado with opportunities for all to thrive. The Foundation is home to nearly 60 donor advised funds, organizational funds, designated funds, scholarship funds, fiscal sponsorship funds and field of interest funds, managing more than \$5 million in investments for philanthropists in our community.

In 2018, the Community Foundation serving Southwest Colorado infused \$2.87 million into Southwest Colorado's nonprofit community.

- \$1,743,451 in grants to nonprofits from Community Foundation Fund Holders
- \$996,532 in grants from Friends of the Foundation to our fiscal sponsorships and other projects
- \$64,880 in grants funded by the Community Foundation
- \$61,000 in scholarships for educational opportunities

"People with a philanthropic heart use the Community Foundation to make their giving impactful," says fund holder Molly Martin, who is a founder and former board member of the Community Foundation. "I have witnessed the Foundation's giving grow steadily over the last 20 years, and I really value the local insight the staff offers to my family when we consider our giving options."

## CERF Impact Granting

The Community Emergency Relief Fund (CERF) raised \$445,000 in 2018 in the wake of the 416 Fire. Grant disbursements last year included more than \$260,000 in bridge funding for evacuees, people who experienced job interruption, and a unique nonprofit / local business infusion. An additional \$75,000 was designated for future spending to address post-fire environmental and economic impact efforts. In early 2019, the Community Foundation awarded impact grants to Mountain Studies Institute, Southwest Conservation Corps and San Juan Development Association.

Mountain Studies Institute (MSI) was awarded \$10,000 to expand Colorado RiverWatch, a statewide program with the mission to work with voluntary stewards to monitor water quality and other watershed health indicators. With the CERF funds, MSI was able to train volunteers and add two new water quality monitoring sites at Hermosa and Junction Creeks. In the coming months, MSI will invite the public to learn about and join in on sampling efforts, expanding MSI's citizen science work and outreach, bringing our community science we can use.



Mountain Studies Institute training



Southwest Conservation Corps (SCC) was awarded \$10,000 for future mitigation work that may be required in the burn area, ranging from possible flooding to weed abatement. SCC used the CERF grant as a match to apply for and receive \$16,200 for additional natural resource restoration work associated with the negative effects of the 416 Fire.



Silverton Whiteout event

San Juan Development Association was awarded \$5,000 to support economic development in Silverton through event promotion for Whiteout, a snow bike event with more than 200 riders, and Silverton Skijoring, a unique winter sport that teams up a skier with a horse and rider. Both events were very successful, bringing a much-needed infusion into the Silverton economy after last summer's devastating tourist season. ✨

## 12.4.2 Grants

The Community Foundation offers grantmaking services to area businesses, sharing our expertise of the nonprofit sector and helping make corporate giving impactful for our community. We partner with The Payroll Department in administering the application process for their 12.4.2 grants – two \$12,000 matching grants to two organizations in La Plata County. This year's grant recipients are the Be Frank Foundation and Sexual Assault Services Organization (SASO).



*The Payroll Department staff with Be Frank Foundation*

Be Frank will utilize the grant to support a new music day camp later this summer, the Creative Music Conservatory, for students ages 7-17. At the conclusion of the Conservatory students will perform at the Pine River Festival in Bayfield.

SASO's matching grant will expand sexual assault outreach services in Ignacio, helping staff to respond faster and more efficiently to victims, while eliminating transportation challenges and other barriers to service. ✨



*The Payroll Department staff with SASO*



*This year's selected organizations in Archuleta County are Aspen House, LASSO, Pagosa Area Trails Council, Pagosa Springs Arts Council, Pagosa Springs Girls Choir and Rise Above Violence.*



*This year's selected organizations in La Plata County are Durango Creative District, Durango Fall Blaze, Housing Solutions for the Southwest, La Plata County Historical Society, La Plata County Humane Society, Manna, San Juan Mountains Association, The Liberty School, Wolfwood Refuge and 4Core.*

## Summer Concerts

The Community Foundation offers two grant opportunities that encourage the participation of you and your friends in social philanthropy: an affordable night on the town, spending delightful summer evenings enjoying live music outdoors, while supporting local nonprofits. We have two venues to choose from — the Community Concerts in the Secret Garden in Durango, **Wednesdays, 5-7 PM through August 28** and the 19th Hole Concerts at the Pagosa Springs Golf Club, **Thursdays, 5:30 - 7:30 PM through July 25**.

The cover charge at each concert is a \$10 cash donation to support the nonprofits selected for the concert series. At the end of each series, all proceeds are pooled and donated equally to the featured organizations.

You can help make these grant opportunities successful by joining us! Last year, the combined summer concert series raised more than \$25,000 for 16 organizations in Southwest Colorado. ✨

# New Board Members



*Gabrielle Dorr* settled in Pagosa Springs in 2018 after traveling for a year with her family in an Airstream trailer up the West Coast to Canada and throughout the Southwest. Before landing in Colorado, Gabrielle spent 12 years as a Communications and Marketing Manager for the National Oceanic & Atmospheric Administration in California and Washington, D.C. Gabrielle is formally trained as a marine

biologist; however, she soon found that her passion was to educate and empower people to be stewards of the oceans and marine life. She especially enjoys storytelling through digital media to inspire change. Gabrielle is currently starting her own marketing consulting business to help nonprofits be more effective. Gabrielle looks forward to bringing new ideas and her own inspiration to the Community Foundation Board.



*Debbie Pfeifer* is a communications consultant with more than 25 years of experience helping companies with media and analyst relations, corporate positioning, and community relations. She began her career at a Los Angeles-based public relations agency, headed communications at large companies, including PowerBar and Wesabe, and served as a consultant for numerous start-ups and established corporations. She has volunteered and provided strategic counsel for nonprofits

focused on literacy, food security, gender equality and education. A recent Durango transplant, Debbie joined the Community Foundation to better understand the issues facing Southwest Colorado and to support the nonprofits and philanthropists that are meeting those needs and enriching life for residents. She and her husband, Tom, enjoy hiking, paddle boarding, and trying to keep up with their twin boys on the ski slopes.



*Margie Deane Gray* has always loved volunteering because it has deepened her connection with the people of the community and their needs. Professionally, Margie has had a varied work experience, from being a cartographic designer at National Geographic, to teaching art in a local elementary school, to the Executive Director of Fundraising for one of the country's largest outside performing venues, to the Executive Director for the Fort

Lewis College Foundation and the Executive Director of the Mesa Verde National Park Foundation. Margie has also been fortunate to have served on many local nonprofit boards, where she learned of their need for support and, just as importantly, their passionate commitment to the people of this town. She has been involved with the Women's Resource Center, the Durango Arts Center, Merely Players, Durango PlayFest, Fort Lewis Mesa Elementary School, Leadership La Plata, and the Red Cross.



*Bill Young* is the Executive Vice President and Chief Financial Officer of First Southwest Bank, a Community Development Financial Institution. The mission of FSWB is to cultivate valuable relationships, invest in economic and social doers, and foster a well-lived rural Colorado culture. As a part of the FSWB team, Bill emphasizes broad support of rural communities. Bill has been in banking for over 40 years and has been the CFO

at FSWB for over five years. Bill is a graduate of The College of William & Mary and is also a Certified Public Accountant. He joined the Finance Committee of the Community Foundation in 2018 and was happy to join the Board when asked. Bill sees this as an opportunity to better understand the Foundation's mission and to help grow the organization. He and his wife Paula moved to Durango in 2013 and enjoy hiking the local trails.

# Planned Giving

*One of the easiest and most flexible ways that you can leave an impact on the community is with a gift through your will or living trust.*

This is one of the easiest gifts to make. With the help of an attorney, you can include language in your will or trust specifying a gift to be made to family, friends and the Community Foundation as part of your estate plans, or you can make a gift using a beneficiary designation form.

Ways to leave a gift to the Community Foundation:

- Include a gift to the Community Foundation in your will or living trust
- Designate the Community Foundation as a full, partial or contingent beneficiary of your retirement account (IRA, 401(k), 401(b) or pension)
- Name the Community Foundation as a beneficiary of your life insurance policy
- A Pay on Death (POD) or Transfer on Death (TOD) naming the Community Foundation on your bank of investment accounts

A gift through your will or trust may be made in several ways:

- Percentage bequest – make a gift of a percentage of your estate
- Specific bequest – make a gift of a specific dollar amount or a specific asset
- Residual bequest – make a gift from the balance or residue of your estate

If you have any questions about leaving a legacy gift to the community, please contact us. We would be happy to create an individual giving plan that supports your passions. If you have been so generous as to include a gift to the Community Foundation as part of your estate plan, please take the time to let us know. We would like to recognize you and your family for your generosity.

## Dodge & Cox Investment Returns

The Community Foundation invests its assets at Dodge & Cox, an investments management company founded in 1930 in San Francisco. They are known for their prudent investment and measured long-term growth strategy.

AVERAGE ANNUAL TOTAL RETURNS\*  
For periods ending March 31, 2019 (updated quarterly)

DODGE & COX FUND/ COMPARATIVE INDEX	1 YEAR	5 YEARS	20 YEARS/ INCEPTION*
<b>Stock Fund</b>	4.30%	8.65%	9.16%
S&P 500 Index	9.50%	10.91%	6.04%
<b>Global Stock Fund</b>	-1.55%	5.27%	5.23%†
MSCI World Index	4.01%	6.78%	5.28%†
<b>International Stock Fund</b>	-8.00%	0.85%	6.86%†
MSCI EAFE Index	-3.71%	2.33%	4.46%†
<b>Balanced Fund</b>	4.40%	6.85%	8.11%
Combined Index	7.78%	7.76%	5.81%
<b>Income Fund</b>	4.32%	3.15%	5.29%
Bloomberg Barclays U.S. Aggregate Bond Index	4.48%	2.74%	4.73%
<b>Global Bond Fund</b>	2.72%††	2.38%	2.79%††
Bloomberg Barclays Global Aggregate Bond Index	-0.38%††	1.04%	0.66%††

Returns represent past performance and do not guarantee future results. Investment return and share price will fluctuate with market conditions, and investors may have a gain or loss when shares are sold. Mutual fund performance changes over time and currently may be significantly lower than stated above.



*With our Making a Difference speaker series, the Community Foundation is committed to tackling challenging issues and mobilizing local philanthropy to make a difference in our community. In the spring, Monica Lewinsky addressed an important topic in Southwest Colorado: mental health and resilience. The theme, Post Positive: Change the Content, called for responsible use of social media and an end to cyberbullying.*



*Our evening event featured a panel of local experts discussing mental health efforts in our region. Attendees were inspired to plan next steps to keep this conversation going, with a focus on community needs and access to resources.*



*At our luncheon, Lewinsky was joined by a local woman who shared her family's story of overcoming bullying. While these conversations are sometimes difficult, our community benefits from a thorough examination of issues and responses.*

# Nonprofit Resources

## Supporting a Sustainable Nonprofit Sector

### Upcoming Nonprofit Board Training

Strong and effective board leadership is one of the best ways to ensure sustainable organizations meet the needs in our community. That's why we regularly focus on nonprofit board member training. This fall, we are expanding our already rigorous three-part series to also include a nonprofit staff component. We are excited to bring Illene Roggensack of Third Sector Innovations to Southwest Colorado for a three-town tour. She will offer workshop trainings in Cortez, Durango and Pagosa Springs. If you are a nonprofit board member, you won't want to miss this valuable opportunity to learn how you can strategically serve your organization. Visit [swcommunityfoundation.org](http://swcommunityfoundation.org) to learn more.

This training is sponsored in part by the Regional Leadership Committee of Southwest Rural Philanthropy Days (SWRPD). Community Foundation staff participate in the SWRPD steering committee that coordinates nonprofit trainings each year, including an intensive three-day networking conference once every four years, which occurred last September in Cortez. Supporting the success and viability of nonprofits in our region is a key component of the mission of the Community Foundation, and we are pleased to partner with SWRPD in that shared goal. ✨



### 20/20/20 Challenge to Power Philanthropy

To celebrate our 20th anniversary serving our community, we have launched the 20/20/20 Challenge. We are raising \$20,000 to match a \$20,000 gift by the year 2020. All money raised for this campaign will be directed to the La Plata County Fund, which we will use to grant to local nonprofits in the future. Every dollar you give automatically doubles. Visit [swcommunityfoundation.org](http://swcommunityfoundation.org) to donate.



### Social Media Workshop

The Community Foundation partnered with Jessika Buell and Marketing Concepts Squared to offer a social media primer for our Community Concerts grantees, helping nonprofits to stay on the cutting edge of an ever-changing media landscape to reach more supporters.



## Video Marketing Opportunity in Archuleta

Grantees from our 19th Hole Concerts were treated to “Video Production 101” while learning valuable event-planning and promotion skills. The 60-second video will be shared across Archuleta County to generate increased attendance at the summer concert series. The Archuleta Committee of the Community Foundation is always looking for new ways to support development in the nonprofit sector. ✨



## Southwest Colorado Gives

Colorado Gives Day, scheduled for December 10, 2019, is an annual statewide giving initiative that celebrates philanthropy and inspires donors to “give where they live” through online donations. In our third year as a Regional Champion, the Community Foundation leads the local effort to strengthen online giving in Southwest Colorado by spearheading a regional online platform [swcogives.org](http://swcogives.org) specifically for Southwest Colorado, making it easier for donors to find nonprofits in our region and give locally. Since the introduction of our regional platform in 2016, we’ve seen some incredible increases on Colorado Gives Day within our five-county region – more than doubling the number of participating nonprofits from 28 to 67, and almost doubling the dollar amount donated in our region from \$144K to \$270K. The platform is available for donors year-round. Visit [swcogives.org](http://swcogives.org) to contribute.

## Financial Professional Development

In April the Community Foundation hosted a comprehensive two-day workshop on best practices in nonprofit finances. Our favorite take-away from the training was that “nonprofit” is a tax status, not a business model. *Financial Focus: Mission and Money* was facilitated by the Nonprofit Finance Fund and equipped nonprofit leaders to understand the operating performance and financial health of their organizations, empowering participants to make strategic decisions informed by their own financial stories. ✨





We are proud to be a Certified Living Wage Employer.

## LPEA Supports the Community

The Community Foundation is proud to have benefited from La Plata Electric Association's community giving in multiple ways. LPEA supported the Community Foundation with a Special Projects grant last fall to enable the Foundation to upgrade office technology and equipment. LPEA also supported Southwest Colorado Gives and Southwest Rural Philanthropy Days through the Community Foundation and has been a corporate sponsor of our professional development offerings. If you are an LPEA customer, you can support your community through LPEA's giving programs by rounding up your electric bills. Visit [lpea.com](http://lpea.com) to learn more or call 970.247.5786. **Pocket Change for Positive Change.**



### Suzanne's Summary

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What a thrill to go in to our 20th year with the special honor of receiving the Nonprofit of the Year Award at Durango Rocks Chamber awards event in January. We're very proud of our staff and how hard they work on behalf of Southwest Colorado!

We're raising \$20,000 by 2020 to celebrate our 20 years of service. The amount raised will benefit our La Plata County Fund – a geographic fund that will support nonprofits in La Plata. You can expect some fun upcoming announcements on how to participate!

#### Board Recruitment

At the halfway point of the year, we're looking ahead to 2020. That means not only appreciating those who have volunteered their time and talent on our Board and are graduating—but diligently searching for a new class of passionate individuals who will move us into the future.

#### What is the Community Foundation serving Southwest Colorado?

This organization does a lot! That might be why it can be tough to explain it clearly in just a few words. We've been out and about in the community to bring clarity to that. Here it is in a nutshell:

The Community Foundation serving Southwest Colorado

- Educates the community on issues facing our five counties
- Matches the passions of philanthropists with the local nonprofits getting the work done
- Supports the nonprofit sector by making it stronger through professional development, technical assistance, and grants

We're here to serve you! ✨

### Impact Investing

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An Impact Investing fund can help solve these factors:

- Fund a down payment by using money from the Investing Circle
- The commercial real estate mortgage loan will then be within the loan policy at FSMB; the Bank has access to funds that allow it to tailor a loan with no balloon payment and payment terms that are like the rent currently being paid by the non-profit

The rules and perimeters of the Impact Investing Circle would be established by the group. With Impact Investing, we will be able to unlock potential of some of the most important and promising nonprofits by providing capital so they can build facilities, grow teams and expand programs.

If you are interested, send me an email or call the office. Our initial meeting will September 25 at noon. Please feel free to pass this along to others who you think might be interested. In the meantime, I will be doing more research so that we can present options and case studies at the meeting in September. ✨

## Thank you to our Inspirational Sponsors!

