WE ARE BUZZING
with gratitude

2019 COMMUNITY REPORT

2018 FINANCIAL REPORT

LA PLATA COUNTY  ARCHULETA COUNTY  MONTEZUMA COUNTY  DOLORES COUNTY  SAN JUAN COUNTY
We fancy ourselves as pollinators. We pollinate knowledge, grants and best practices to grow a beautiful garden full of nonprofits that make SW Colorado a remarkable place to live.

We believe you need to reach out beyond your hive, collaborating with others to share and gather new ideas from everywhere. A bee will harvest nectar up to two miles from the hive. Our range is all 5 counties in SW Colorado. This year we have made an extra effort to be out and about pollinating (capacity building) and collecting nectar (great ideas).

If you are a beekeeper, you know that no hive is the same, and each one has its own special needs; the same is with nonprofits. The flora and fauna around the hive have a direct relation to the taste and texture of the honey. That is why we offer such a variety of flowers (opportunities) for the nonprofit community.

Honeydew honey is thought to be medicinal and good for local allergies. Likewise, our new LAUNCH Fund assists nonprofits to secure funds to accommodate growth and keep fiscal health a priority. We have partnered with First Southwest Bank to provide low-interest loans for nonprofits to purchase real estate, renovate a space or purchase a piece of equipment. Leveraging First Southwest Bank’s CDFI (Community Development Financial Institution) designation, we can provide access to terms that appeal to nonprofit boards and staff, so there is no sting. From the investor side, this is a way to make a new impact, using the dollars to create a revolving loan fund – enabling the dollars to circulate again and again.

Wildflower honey is thought to be the nectar of the gods, which is also how we might describe the $20,000 matching gift we received from Walt Dear to seed the La Plata County Fund. This fund will be used to support the nonprofit community and cross pollinate ideas, expertise, and best practices for years to come.

For bees, the waggle is a dance performed to show where essential resources lie. This Community Report recaps the projects and initiatives of the Community Foundation. We have never before thought of it as a waggle – and boy do we waggle.

If you would like to be a part of the Community Foundation, you could waggle on over, or just give us a call at 970.375.5807.

In gratitude,

BRIGGEN WRINKLE | Executive Director

P.S. Erin McGuinness is our Finance & Operations Director and a fourth-generation beekeeper.
It is an honor to describe our positive experiences with the Community Foundation serving Southwest Colorado. Prior to moving to Durango from Boulder in 2012, a national investment fund manager administered our Donor Advised Fund (DAF). Shortly after arriving in Durango, we were delighted to learn about the Community Foundation. We contacted the Foundation to learn about the organization in general and specifically about its DAF capabilities. As explained below, Briggen Wrinkle, the Executive Director, enlightened us about the numerous benefits of having a locally administered DAF.

First, we learned that the Community Foundation has as many investment options available for your DAF as the large national administrators. Second, we learned that the administration fees charged to DAF account holders by the Community Foundation are very competitive with those charged by the national administrators. Third, we learned that the Community Foundation in turn invests those management fees into its mission of serving countless local nonprofits – thereby keeping our giving dollars local and supporting the community in which we live.

Now that we have been with the Community Foundation for several years, we have also learned how beneficial the Community Foundation is in helping us identify local nonprofits for our giving consideration. Periodically, we receive helpful descriptions of various local nonprofits that are doing amazing things in our Durango community, of which we were not aware. As well, the Community Foundation itself has many initiatives supporting local causes throughout the year. Many of these giving opportunities dovetail with our charitable focus related to conservation, health, children, and animals.

We have also learned how easy it is to work with the Community Foundation. We simply send an email asking that the identified nonprofits receive a specified donation from our DAF. There are no forms to complete or other administrative hassle. That level of simplicity is unheard of today and is so refreshing. As well, the customer service at the Community Foundation is second to none. Telephone calls and emails are responded to promptly and courteously. That level of personal and professional attention is a rarity. We could not be happier with our switch to the Community Foundation, and we are so supportive of all they do for Southwest Colorado!

DAVE & MICHELE HARRIS
Much of the activity around our hive focuses on nonprofit support, with worker bees building capacity and collaboration across the sector, through workshops, grant management, grantmaking and innovative new ideas to fulfill our vision: a generous, vibrant and inclusive Southwest Colorado, with opportunities for all to thrive.

**Capacity Building**

In 2019, the Community Foundation embarked on creative, engaging opportunities for nonprofits to learn new skills to better fulfill their missions. We collaborated with the Nonprofit Finance Fund to educate nonprofit leaders to better tell their stories through meaningful numbers. We offered resourceful social media workshops and promotional video training to expose organizations to new methods of outreach. We conducted a tireless three-town tour of the region, sharing best practices in board development, for both staff and board members. In total, more than 200 people were trained through our capacity-building workshops this year.

**Regional Collaboration**

This is the third year the Community Foundation has spearheaded local participation in Colorado Gives Day, collaborating with more than 70 nonprofits across Southwest Colorado. Donate online on December 10 on our easy, secure platform, swcogives.org and Give Where You Live! Last year $35.1 million was raised statewide, with $270,611 donated to nonprofits in our region.

**LAUNCH**

You have probably heard the buzz: through our new Impact Investing Fund, in partnership with First Southwest Bank, we are offering low-interest loans that will enable nonprofits to take the next big leap, to LAUNCH them into the future. Talk to us about how you can be involved.
Grantmaking

The Community Foundation has two longstanding and successful grant opportunities for organizations in La Plata and Archuleta counties to participate in, our summer concerts. In 2019 we raised almost $25,000 from concert cover charges, which was shared among 16 nonprofits. Organizations learn important event-planning and marketing skills, in addition to the grant proceeds. Plan to join us next summer for these fun community events.

The Community Foundation continues to infuse 416 Fire recovery funds from the Community Emergency Relief Fund (CERF). In 2019, we granted $10,000 to Mountain Studies Institute to monitor watersheds after the fire. We granted $10,000 to Southwest Conservation Corps for flood mitigation on 26 acres in the burn area. In addition, San Juan Development Association was awarded $5,000 in support of event promotion to boost Silverton’s economy. In 2020, another $25,000 in grants is earmarked to address continued economic and environmental impacts from the fire.

Grant Management

The Community Foundation provides grant management services for the Ballantine Family’s private foundation. We receive and review online applications, process grant disbursements as determined by Ballantine Trustees, and monitor post grant reporting. The Ballantine Family generously grants more than $300,000 each year across the region, to more than 125 organizations.

The Community Foundation offers grant management services to area businesses, as well. We assist the Payroll Department with a portion of their corporate giving: two $12,000 matching grants called 12.4.2. This year’s recipients, SASO and Be Frank, both achieved their match challenge and infused $24,000 of new revenue into their organizations. The Community Foundation administers the grant application and reporting processes.

New this year—the Community Foundation administers a philanthropy program for Primus Restaurant, supporting a different nonprofit each month with a portion of proceeds. Make a reservation today to enjoy a delicious meal, while giving back to your community.
The Community Foundation serving Southwest Colorado infused $2.87 million into Southwest Colorado’s nonprofits in 2018

$1,743,451 in grants to nonprofits from our Fund Holders

$996,532 in grants from Friends of the Foundation to our fiscal sponsorships and other projects

CAUSES OUR DONORS Care About

Durango STEAM Park
Durango Winter Sports Foundation
Early Childhood Council of La Plata County
Environmental Defense Fund
4 Paws for Life
4 The Children
Fort Lewis College Foundation
Four Corners Rainbow Youth Center
Garden Project of Southwest Colorado
Great Old Broads For Wilderness
Heart for the Needy
Housing Solutions for the Southwest
Humane Society of Logan County
iAM Music
Juniper School
KDUR FM
Know Your Dough
KSUT
La Plata County Search and Rescue
La Plata Family Centers Coalition
La Plata Historical Society
La Plata Humane Society
La Plata Youth Services
Liberty School
Lincoln College
Lisa Parker’s Puppies
Manna
Mercy Health Foundation
Merely Players
Mountain Studies Institute
Music in the Mountains
National Parks Conservation Association
Nature Conservancy in Colorado
Planned Parenthood, Durango
Powerhouse Science Center
Prairie Hill Waldorf School
Riverhouse Children’s Center
Rocky Mountain PBS
Rocky Mountain Public Media
San Juan Citizen’s Alliance
San Juan County Historical Society
San Juan Mountains Association
San Juan Resource Conservation & Development Council
San Juan Symphony
Sexual Assault Services Organization
Shanta Foundation
Sierra Club Foundation
Silverton Avalanche School
Silverton Family Learning Center
Silverton School District
Silverton Single Track Society
Silverton Youth Center
Southwest Center for Independence
Southwest Land Alliance
Stillwater Music
The Grief Center of SW Colorado
The Theatre Mine
Trails 2000
Unitarian Universalist Association
Unitarian Universalist Fellowship Durango
Unitarian Universalist Service Committee
United Way of Southwest Colorado
University of Illinois Foundation
University of Colorado Foundation
Vallecito Nordic
Volunteers of America
Wildland Firefighters Foundation
Women’s Resource Center

Adaptive Sports Association
All Saints in Big Sky
Alzheimer’s Association
American Legion Post 263
Animas High School
ARC of Southwest Colorado
Bear Smart Durango
Big Brothers Big Sisters of SW Colorado
Boys and Girls Club of La Plata County
Café au Play
Cancer Coalition of SW Colorado
Colorado Public Radio
Community Connections, Inc.
Community Emergency Relief Fund
Community Foundation serving SW Colorado
Compañeros
Cyclic Vomiting Syndrome Association
Dollywood Foundation
Durango School District 9R
Durango Adult Education Center
Durango Area Tourism Office, Inc.
Durango Arts Center
Durango Creative District
Durango Early Learning Center
Durango Adult Education Center
Durango Education Foundation
Durango Film
Durango Food Bank
Durango Nature Studies
Durango Nordic Ski Club

ag, food + nutrition
animals
arts, culture + humanities
community improvement
education
$61,000 in scholarships for educational opportunities

$64,880 in grants funded by the Community Foundation

$709,823 in combined donations to and from the Community Emergency Relief Fund

$996,532 in grants from Friends of the Foundation to our fiscal sponsorships and other projects

A Mile in My Shoes
Animas Museum
Archuleta County Fund
Bear Smart Durango
Café au Play
Cancer Coalition of SW Colorado
Community Emergency Relief Fund
Community Health Action Coalition
Daybreak Solar Project
Dumpster Beautification Project
Durango Area
Association of Realtors Fund
Durango Creative District
Joel Zucker Memorial Scholarship Fund
Kiwanis Club Service Fund
La Plata Rotary Scholarship Fund
Native American Education Fund
New Face Productions
Olivia Buchanan
Avalanche Education Fund
Pine River Shares
San Juan Symphony
SW Rural Philanthropy Days

$61,000 in scholarships for educational opportunities

Adams State University
Colorado Christian University
Colorado State University
Cornell College
El Paso Community College
Fort Lewis College
Montana State University
Northern Arizona University
Regis University
San Juan College
Texas Tech University
University of Colorado Boulder
University of Denver
Willamette University

$64,880 in grants funded by the Community Foundation

Aid for Pets
Alternative Horizons
Archuleta Seniors, Inc.
Aspire
Be Fit Be Able Foundation
Bear Smart Durango
Boys and Girls Club of La Plata County
Chimney Rock Interpretive Association
Community Foundation serving SW Colorado
dogster Spay and Neuter
Durango Community
After Prom Association
Durango Education Foundation
Durango Film
Durango Nature Studies
Dust 2
Four Corners Rainbow Youth Center
La Plata Family Centers Coalition
La Plata Youth Services
Lisa Parker’s Puppies
Mountain Studies Institute
Pagosa Springs Arts Council
Pagosa Springs Girls Choir
Power to Act
Rocky Mountain PBS
San Juan Outdoor Club
Second Wind
Sexual Assault Services Organization
Something Wild Film Festival
Southern Ute
Community Action Programs
Southwest Center for Independence
Spring Creek Horse Rescue
The Chicago Community Foundation
Wolf Woods
The mission of the La Plata County Historical Society (LPCHS) is to keep La Plata County history and culture alive for present and future generations. LPCHS owns, operates and maintains the Animas Museum, along with its outbuildings and grounds. The Animas Museum provides programs for the community and those interested in learning more about our local history.

We have held an Organization Fund with the Community Foundation for almost 20 years. The fund is one piece of our fiscal planning to ensure long-term success for the museum. The Community Foundation’s investment and management of our fund is a convenient option that allows us to focus on continuing to be the keeper of our area’s history, while safeguarding a bright future with funds available for unforeseen challenges.

JEFF HUTCHINSON | Director, Animas Museum

FISCAL SPONSORSHIP Spotlight

When we connected with the Community Foundation, Pine River Shares was little more than a band of grassroots activists and dedicated volunteers working out of a tiny office full of reclaimed furniture. With dirt on our boots and under our nails, we were short on structure, but expansive in our vision of building health equity in the Pine River Valley.

Lasting change occurs when it is led by those affected by an issue. When we first started, we understood how social and cultural isolation affect Pine River Valley residents and that connection is our strongest protective factor. Our first activity became symbolic of our work—we shared a meal where people brought what they had to share and took what they needed from the communal table. The transformation we envisioned when we first started is now happening. People with wildly different perspectives, and even opposing viewpoints, regularly come together to improve conditions for everyone.

Our decision to partner with the Community Foundation reflects our commitment to building solutions through community connections. We could have chosen a different route. The changes we want for ourselves and our children are too hard to make on our own. The expertise, guidance, resource sharing and flexible support offered to us by the Foundation is helping Pine River Shares grow into a strong, vibrant organization. Collaborating with the Foundation ensures our ability to craft a sustainable, healthy future for ourselves and for future generations. Pine River Shares, like the Foundation, is invested in generous, inclusive communities where everyone thrives.

KEY LEADERS | Pine River Shares
A LOOK AT GIVING UNDER THE NEW TAX LAW

The new tax law nearly doubles the standard deduction for individuals and families, simplifying the filing process for millions of Americans, while complicating giving strategies for many who have made a practice of deducting their charitable contributions.

Indeed, an estimate from the Washington, D.C., Tax Policy Center is that the number of itemizers will drop from 46 million to 13 million. That means most taxpayers will not have tax incentive to donate cash or stock to nonprofits, potentially reducing giving by $13 billion to $20 billion a year.

There is a financial tool that can help, a Donor Advised Fund (DAF). They act like personal charitable savings accounts. DAFs allow contributors to donate and take a tax deduction in the same year. If you itemize once every three years, you can seed your DAF the funds for three years’ worth of donations. You can set up a DAF account at the Community Foundation serving SW Colorado.

You can add assets whenever you want, deciding later how much to donate and to which organizations. You advise the Community Foundation how to grant the money.

DAFs can also accept securities, and this is an excellent way to donate appreciated stocks without paying capital gains tax. When you put appreciated securities into a DAF, you get to deduct the full current value from your taxable income that year. With the stock market at record highs, many investors have portfolios full of appreciated stock they can’t sell without paying capital gains taxes. So, it can be a great opportunity to transfer appreciated stocks, mutual funds and ETFs into a DAF and get the deduction right away.

Of course, tax write-offs are not the only reason people make donations. There’s a genuine wish to do good! But it can’t be denied that there’s usually an enormous amount of giving in the last two days of a year, meaning that tax benefits drive a lot of folks. By taking advantage of DAFs, you’ll allow your charitable desires to coincide with smart tax planning too!

As always, please consult with your financial advisor to take advantage of these strategies. Feel free to contact the Community Foundation for more information or to talk about your charitable contribution strategy.
The Community Foundation has seen a steady growth in our assets over the last decade. As we celebrate our 20th year, we are looking to grow our assets as we expand our Nonprofit Support Funds, supporting each of our five counties, our Designated and Field of Interest Funds, as well as our Donor Advised Funds.

To review a copy of the full audit, visit SWCommunityFoundation.org

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### ASSETS BY FUND TYPE

- **Donor Advised Funds**: 56%
- **Organization Funds**: 21%
- **Fiscal Sponsorships & Scholarships**: 12%
- **Nonprofit Support Funds**: 6%
- **CF Operations & Reserve**: 5%

### 2018 STATEMENT OF FINANCIAL POSITION

**Assets**
- Cash & Equivalents: 603,824
- Investments: 4,504,560
- Credit Card Deposits: 2,254
- **Total Assets**: 5,110,638

**Liabilities**
- Organization Funds: 1,092,393
- Other: 57
- **Total Liabilities**: 1,184,850

**Net Assets**
- Temporarily Restricted: 802,359
- Unrestricted: 3,215,829
- **Total Net Assets**: 4,018,188

**Total Liabilities & Net Assets**: 5,110,638
We continue to maintain incredibly low operating costs for the assets we manage, and we strive to put as many dollars back into our community as we can, while still offering the highest quality services for our clients and community members.

For every $1 we spend in operations, we facilitate $11.41 in grants.

Our expense ratio is 4.9% of the total assets we manage.

The collective hive cultivates a better community, in the present and for our future.

In 2018, 25% of our granting was from the CERF and 416 Fire community giving.

The average size of our donor advised fund is $105,000.

We grant to local, national and international nonprofits across all sectors.

The 2018 income sources for operational expenses include:

- Administrative Income: 28%
- Grant Income: 61%
- Corporate/Event Income: 5%
- Individual Contribution: 3%
- Board Contribution: 3%

For every $1 we spend in operations, we facilitate $11.41 in grants.

The 2018 Community Impact vs. Operational Expenses shows:

- Operating Expenses
- Total Grants to Community
- CF Assets

$709,823 from Community Emergency Relief Fund facilitated giving for 416 Fire relief and support.
The Community Foundation’s Making a Difference speaker series is launching into its fourth year with two nationally known speakers to motivate and inspire our community.

Our Making a Difference speaker series serves as a catalyst to prompt conversations and actions that will ultimately benefit the residents of Southwest Colorado.

In January, the Making a Difference speaker is Erik Weihenmayer, athlete, adventurer, motivational speaker and best-selling author of *No Barriers: A Blind Man’s Journey to Kayak the Grand Canyon*.

In 2001 Weihenmayer became the first blind person to summit Mount Everest. In 2008 he joined an elite group of 150 mountaineers by completing the Seven Summits, the highest points on every continent. In 2014 he solo kayaked the thunderous whitewater of the Colorado River through the Grand Canyon.

Weihenmayer has also co-founded the nonprofit No Barriers, with a mission to help people with challenges—all of us to some extent—to turn into the storm of life, face barriers head on.

In May, the Community Foundation’s second Making a Difference speaker will be David Brooks, a *New York Times* columnist, savvy political analyst and commentator on PBS’ *NewsHour* and NPR’s *All Things Considered*. Brooks is coming to Durango to discuss his four commitments that define a life of meaning and purpose, including a commitment to community.

Corporate sponsorships
If you are interested in being a corporate sponsor, please call Briggen Wrinkle at 970.375.5807.

Tickets
Tickets for Erik Weihenmayer and David Brooks are available at the Community Concert Hall’s Downtown Ticket Office within the Durango Welcome Center, online at durangoconcerts.com or by calling 970.247.7657.