Weathering the Storm

the Community Foundation
serving Southwest Colorado

2020 Community Report
2019 Financial Report

LA PLATA COUNTY   ARCHULETA COUNTY   MONTEZUMA COUNTY   DOLORES COUNTY   SAN JUAN COUNTY
What’s Inside?

We are weathering the storm, together. As you peruse this Community Report, it is important to keep in mind that the Community Foundation focuses on three initiatives:

First, we work with donors to impact our community. Join us and leverage your legacy. We are watching the weather, and we recommend dressing in layers and a good pair of socks.

- Donor Advised Fund spotlight on page 3
- Planned Giving spotlight on the back cover
- Financial spotlight on pages 10 & 11 to review our 2019 audited financials

Second, we support the nonprofit sector through grants, professional development, and capacity building. A strong nonprofit sector means our philanthropists are investing in financially stable, forward-thinking organizations that are making SW Colorado a great place to live, work and play. Consider us the umbrella that provides shelter from the storm.

- See pages 6 & 7 for a list of organizations that received a grant in 2019
- See pages 8 & 9 to learn about the different ways we support nonprofits

Third, we work with the community to look for creative and collaborative ways to solve big issues, like the turbulence brought on by a pandemic. Philanthropy plays an important role in providing protection from the storm, and we look forward to the day we can close our umbrellas and greet fairer weather.

- See pages 4 & 5 for our CERF report including vignettes about special projects that really make this $1.25 million infusion come to life

Happy Reading,

Briggen Wrinkle

Briggen Wrinkle | Executive Director

２０２０ Board Members

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Shawn Candelaria, Vice President
Debbie Pfeifer, Secretary
Bill Young / Amy Moody, Treasurer
Suzanne Harrison, Past President

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Wendy Barney
Bethany Bieth
Nancy Bonnett
Melissa Glick
Kim Oyler

Non-Board Committee Members
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Chuck Fredrick
Dick Griffith
Jan Johnson
Michelle Kooi
Diane Levison
Sherry Phillips
Steve Phillips
David Smiley
Lauren Ziesel

Staff
Briggen Wrinkle, Executive Director
Erin McGuinness, Finance Director
Tracy Pope, Marketing & Grants Director

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INSCRIPTIONAL SPONSORS

THE COMMUNITY FOUNDATION SERVING SOUTHWEST COLORADO
Ed and Lois Bartig-Small have called Durango home for 40 years. Known by many from their days as teachers at Smiley Junior High, their passionate pursuits in what can only loosely be called retirement have also defined who they are and what they offer our community. Having inherited the giving responsibilities of a Donor Advised Fund from Lois’ parents, it is no surprise that the Bartig-Smalls are creating a legacy of impact of their own, by contributing to local charities that support the passions they have enjoyed throughout their lifetimes.

Lois and Ed work with a large Community Foundation in California to support the legacy of her family; however, it is the personal relationships they have found locally at the Community Foundation serving Southwest Colorado that they credit for boosting the philanthropy of the Bartig-Small Family Fund.

Lois has a particular passion for the outdoors, the environment, and the protection of our beautiful wilderness areas, while Ed enjoys working with people with disabilities. The couple meets regularly with the Community Foundation staff to stay connected with the landscape of our local nonprofit community, learning timely information about a broad array of organizations that support their interests.

Relying on the skills and knowledge of the Foundation enables the Bartig-Smalls to expand their giving to new organizations that they might not be as familiar with. The Foundation also keeps track of their regular giving and requests grant updates, which are provided and reviewed annually. This intimate relationship makes local support easy and fruitful.

Once a teacher, always a teacher—so the Bartig-Smalls have a lesson to share with us all about empowering our passions and our philanthropy to make a difference in Southwest Colorado. The Community Foundation can help facilitate your charitable goals, as well, with a personalized approach to your community investments. Schedule an appointment with Briggen and learn how we can support you, as you support our amazing community.

Donor Advised Fund
Spotlight

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# COVID-19 Community Report

**CERF supports nonprofits and the broader community**

## CERF Funds Raised

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community &amp; Service Organizations</td>
<td>$47,790</td>
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<tr>
<td>Local Corporate Donors</td>
<td>$102,732</td>
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<tr>
<td>Local Government</td>
<td>$84,000</td>
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<tr>
<td>DAF/Family Foundations</td>
<td>$193,750</td>
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<tr>
<td>Front Range Foundations</td>
<td>$25,000</td>
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<tr>
<td>No-touch Thermometers Project</td>
<td>$16,355</td>
</tr>
<tr>
<td>Individuals</td>
<td>$141,099</td>
</tr>
<tr>
<td>Tech Gives Back (4 individuals)</td>
<td>$300,000</td>
</tr>
</tbody>
</table>

**Total Raised: $910,726**

## CERF Funds Spent

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save the Food, Feed the People</td>
<td>$8,686</td>
</tr>
<tr>
<td>3 Rounds of Grants to Nonprofits</td>
<td>$359,500</td>
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<tr>
<td>Food Security</td>
<td>$187,621</td>
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<tr>
<td>No-touch Thermometers Project</td>
<td>$16,437</td>
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<tr>
<td>Youth Initiative</td>
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<td>2021 COVID Assistance</td>
<td>$147,000</td>
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<td>Administration Costs</td>
<td>$24,811</td>
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<tr>
<td>CERF Investment for Future Emergencies</td>
<td>$24,000</td>
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<tr>
<td>Community Foundation Grant Management</td>
<td>$43,401</td>
</tr>
</tbody>
</table>

**Total Spent: $910,726**

## Key Contributions
- **LARGEST GIFT**
  - From an individual: $190,000
  - From a business: $25,000
- **LARGEST GIFT**
  - Raised locally: $40,000
- **Tiniest Gift**
  - From an individual: $10

## CERF Supports
- Nonprofits
- The broader community

**Tito’s** donated $40,000 in hand sanitizer for nonprofits and school districts in SW Colorado.
$1.25+ million in COVID rapid-response granting through the Community Foundation

Once again, we are humbled to see the community come together to support neighbors. This report shares how emergency contributions were distributed to SW Colorado through October 30.

CERF Grants: $617,514
Donor Advised Funds & Projects: $593,180

Tech Gives Back
A small group of technology business leaders donated $300,000 to support the community through:

$100,000 to Food Security
The Community Foundation purchased seven truckloads ($64,000) of non-perishable foods to stock food pantry shelves in our five-county region. We committed another $36,000 in perishable food purchases, leveraging these orders to spur another $85,000 from other sources, including CARES Act money, to expand reach and deepen quantity received. A fringe benefit is supporting our regional farmers by locally-sourcing veggies and beef.

$100,000 to Youth Employment
Supported 17 nonprofits that continued to provide quality youth employment opportunities that challenge our youth to have a deeper understanding of our community and learn real-life skills.

$100,000 in reserve for unforeseen needs in 2021

School & Restaurant Appreciation
The Community Foundation rallied our Donor Advised Funds and infused $37,000 into local restaurants to purchase a $50 gift card for every staffer at Durango 9R School District and Animas High School, to say thank you to 733 people who have worked hard to educate our students and protect our community.

Save the Food, Feed the People
This project’s simplicity was its brilliance. Blaine Bailey, founder of In the Weeds, realized that with spring break cut short, restaurants had kitchens full of food and no customers, and chefs were out of work. Blaine worked tirelessly to employ local chefs who prepared the food on hand before it spoiled. They created healthy and delicious meals to be delivered to seniors, families, and high-risk individuals. The Community Foundation paid the chefs who prepared 600 meals a week.

Southwest Colorado Disaster Assistance
The Community Foundation launched the SWCODA website to provide resources for nonprofits, local information about COVID protocols, and economic recovery tools. All five counties have information and resources listed on SWCODA.org.

Match Madness
Everyone loves their dollar to stretch and donations are no different. The Community Foundation spearheaded several match opportunities to maximize giving.

The Payroll Department challenged its clients to match Payroll’s CERF donation of $10,000. Total gift from the Payroll Department and their clients was $20,000.

Animas Surgical Hospital worked with its partners on a match challenge that raised $28,000 for CERF.

Local businesses, governments, family funds and individuals matched CERF Grant Rounds 1&2 to double the grants given to nonprofits.
Causes our Donors Care About

The Community Foundation serving Southwest Colorado infused $1.8 million into Southwest Colorado’s nonprofits in 2019

$1,270,191 in grants to nonprofits from our Fund Holders
$457,330 in grants from Friends of the Foundation to our fiscal sponsorships and other projects
$58,500 in scholarships for educational opportunities
$35,032 in grants funded by the Community Foundation projects

Animal Protection $47,865
4 Paws 4 Life Rescue
Audubon-Rockies
Bear Smart
La Plata County Humane Society
LASSO
Lisa Parker’s Puppies
Wolf Woods

Arts & Culture $313,986
3rd Ave. Arts
Be Frank Foundation
Betty Serzen Endowment
Colorado Public Radio
Crow Canyon Archaeological Society
Dumpster Beautification Project
Durango Arts Center
Durango Botanical Garden
Durango Creative District
Durango Film
Durango Friends of the Library
Durango Playfest
Fort Lewis Concert Hall
High Country News
iAM Music
KDUR FM
KSUT
La Plata Historical Society
Local First Foundation

Mancos Valley Chorus
Merely Players
Mountain Light Music Festival
Music in the Mountains
New Face Productions
Ouray Opera House
Pagosa Springs Arts Council
Pagosa Springs Girls Choir
Powerhouse Science Center
Rocky Mountain PBS
San Juan Symphony
Stillwater Music

County / Impact $42,518
Archuleta County Fund
First Southwest Community Fund
Impact Investing Fund
La Plata County Fund

Education $557,667
Adam State University
Animas High School
Arizona State University
Colorado Christian University
Colorado College
Colorado Education Initiative
Colorado Mesa University
Colorado State University
Cornell College

Durango 9R
Durango Adult Education Center
Durango Education Foundation
El Paso Community College
Fort Lewis College
Fort Lewis College Foundation
Joel Zucker Memorial Scholarship Fund
Know Your Dough
La Plata High Noon
Rotary Scholarship Fund
Lawrence University
Liberty School
Lincoln College
Metropolitan State University of Denver
Montana State University
Native American Education Fund
Northern Arizona University
Northern Colorado University
Olivia Buchanan
Avalanche Education Fund
Prairie Hill Waldorf School
Regis University
Riverhouse Children’s Center
San Juan College
Seattle University
University of Illinois Foundation
University of Colorado Boulder
University of Colorado Denver
University of Colorado, School of Law Foundation
University of Northern Colorado
University of Virginia
Western Colorado University
Willamette University
### Environment

$72,201

- 2 Forks Club
- 350.org
- 4Core
- Conservation Legacy
- Durango Nature Studies
- Garden Project of SW Colorado
- Great Old Broads for Wilderness
- La Plata Open Space Conservancy
- Montezuma Land Conservancy
- Mountain Studies Institute
- Pagosa Springs Area Trails Council
- Renewable World Foundation
- San Juan Citizens Alliance
- San Juan Mountains Association
- Sierra Club Foundation
- The Nature Conservancy
- Trails 2000
- Vallecito Nordic

### Human Services

$546,243

- 3 Hopeful Hearts
- ACLU of Colorado
- Adaptive Sports Association
- Alzheimer’s Association
- American Belarusian Relief Organization
- ARC of Southwest Colorado
- Aspen House
- Blueprints of Hope
- Durango Fire Protection District
- Breast Cancer Research Foundation
- Bridge of Life
- Café au Play
- Cancer Coalition of Southwest Colorado
- Children’s Hospital Colorado Foundation
- Community Connections, Inc.
- Community Emergency Assistance Coalition
- Community Health Action Coalition
- Community Treehouse
- Compañeros
- Cyclic Vomiting Syndrome Association
- Daybreak Solar Project
- Durango Baptist Church
- Durango Derailers
- Durango Food Bank
- Durango Sangha
- Facing Our Risk of Cancer Empowered
- First United Methodist Church of Cortez
- Good Will
- Gospel Volunteers, Inc.
- Habitat for Humanity
- Housing Solutions for the Southwest
- Kemple Dental Clinic
- Kentucky Refugee Ministries – Lexington
- Kiwanis Rocky Mountain District Foundation
- La Plata Search and Rescue
- La Plata Youth Services
- Manna
- Mayo Clinic
- Mercy Health Foundation
- National Abortion Rights Action League
- Pine River Shares
- Planned Parenthood
- Rise Above Violence
- Salvation Army
- Sexual Assault Services Organization
- Shanta Foundation
- Southwest Center for Independence
- The American Legion
- The Mango Project
- Thrive! Living Wage Coalition
- Unitarian Universalist Association
- Unitarian Universalist Fellowship
- Durango
- Unitarian Universalist Service Committee

### Youth

$200,471

- All Forward Adventures
- Big Brothers Big Sisters
- Boys and Girls Club
- Dollywood Foundation
- Durango BMX
- Durango Youth Baseball
- Nordic Ski Club
- Rainbow Youth Center

### Other

$40,102

- Colorado Association of Funders
- Community Foundation serving Southwest Colorado
- San Juan Development Association

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**2019 Grants**

**Total:** $1,821,053

**Animal Protection:** $47,865

**Arts & Culture:** $313,986

**County / Impact Funds:** $42,518

**Education:** $557,667

**Environment:** $72,201

**Human Services:** $546,243

**Youth:** $200,471

**Other:** $40,102
2020 has been a challenging year helping the nonprofit sector shelter from the storms that have deluged our world. By providing professional development *virtually* and grant opportunities *creatively* we are working *diligently* to ensure our community’s valued organizations start 2021 with a solid footing and a keen eye on the horizon.

**Grant Management**

The Community Foundation provides grant management services for the Ballantine Family Fund, the Payroll Department and Primus Restaurant. We utilize our extensive knowledge of the nonprofit sector to assist local entities with their philanthropic giving, in excess of $340,000 annually. We manage details of the grant application and review processes of more than 200 organizations, while the grantors make the final disbursement decisions. We offer fund distribution services, as well as post grant report monitoring. If you are interested in learning more about how we can help you streamline your corporate giving or family foundation granting, please give us a call.

**Capacity Building**

Our usual professional development opportunities have gone virtual. Since March, we have hosted a nonprofit resource page on our website, sent countless email newsletters, and curated twice-monthly Zoom webinars, all with the intent of increasing organizational capacity across the region.

Our *Something to Chew On* webinar series covered topics including a deep-dive into COVID-impacted nonprofit financials, building a remote workplace culture, and strategic planning during uncertain times. We also provided a six-month-long personalized coaching experience on planned giving for five organizations across La Plata and Archuleta counties, as well as 10 scholarships to the Colorado Nonprofit Association’s two-day virtual conference for nonprofit leaders in Durango, Cortez and Pagosa Springs.
Regional Collaboration

As a regional champion for Southwest Colorado Gives, we are once again spearheading the collaborative promotion of 85 organizations across our five counties for the statewide giving day on December 8. This year we introduced an electronic magazine for friends and fundholders to highlight what nonprofits need, now. Year-end giving in 2020 will be more impactful than ever. Visit swcogives.org to give where you live, supporting the organizations that serve the communities where we work and play. Our goal is to raise $300,000 locally.

Grantmaking

With in-person gatherings cancelled, our Community Concerts were reimagined. We moved the shows to the radio to benefit local musicians, while raising more than $47,000 for 10 arts organizations across La Plata County – more than twice what our typical summer concerts bring in. At a time when it was challenging to ask for donations for anything other than direct human services, we provided the opportunity for arts and culture organizations to raise funds for the sector, reminding donors that we need art, music, and beauty in our community, now more than ever.

In Archuleta County, our 19th Hole grantees also earned more than usual by selling Rise & Recover Together t-shirts and hats. Three participating organizations each earned more than $2,200, while offering community-building merchandise designed to bring us together. The Archuleta County Fund also benefitted from the campaign.

Fiscal Sponsorship 2019

- All Forward Adventures
- Bear Smart
- Café au Play
- Cancer Coalition of SW Colorado
- Community Health Action Coalition
- Community Treehouse
- Daybreak Solar Project
- Dumpster Beautification Project
- New Face Productions
- Pine River Shares

Scholarship Funds 2019

- Durango Area Association of Realtors Fund
- Joel Zucker Memorial Scholarship Fund
- La Plata Rotary Scholarship Fund

Organization Funds 2019

- Adaptive Sports Association Fund
- Axis Health System Fund
- EMS Scholarship Fund
- Durango Food Bank Fund
- Durango Nature Studies Fund
- Flick and Knopick Endowment Fund
- Give Sonlight to the Next Generation Fund
- Kiwanis Club Service Fund
- La Plata Historical Society Fund
- United Way of Southwest Colorado Fund
- Women’s Resource Center Fund

GIVE WHERE YOU LIVE

December 8, 2020
Throughout the Community Foundation’s two decades of service, we have experienced both sunny and stormy weather.

Our solid growth in assets demonstrates our ability to respond, as needed, regardless of the forecast. When individual donors combine their funds with the dollars of other Community Foundation donors, the impact is substantial.

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

The bar chart is a snapshot of the growth of the Community Foundation’s total assets over the last decade.

### 2019 Statement of Financial Position

**Assets**
- Cash & Equivalents: 539,878
- Investments: 5,968,252
- Other: 1,069
- **Total Assets:** 6,509,199

**Liabilities**
- Organization Funds: 1,611,688
- **Total Liabilities & Net Assets:** 6,509,199

**Net Assets**
- Purpose Restricted: 862,712
- Unrestricted: 4,034,799
- **Total Net Assets:** 4,897,511

### Assets by Fund Type

- **Donor Advised Funds:** 56%
- **Organization Funds:** 25%
- Fiscal Sponsorships & Scholarships: 10%
- **Nonprofit Support Funds:** 4%
- CF Operations & Reserve: 5%
Keeping our operating costs low is something we take seriously.

It is our goal that donors’ dollars be maximized. That is why quality service, combined with a thrifty mindset, makes us a great team for your giving.

Facts for a Rainy Day

- For every $1 we spend in operations, we facilitate $6.63 in grants
- Our expense ratio is 4.2% of the total assets we manage
- The average size of our donor advised fund is $100,000
- 75% of our Donor Advised Funds gave grants so far this year
- We grant to local, national, and international nonprofits across all sectors

2019 Income Sources for Operational Expenses

- Administrative Income: 57%
- Corporate / Event Income: 31%
- Individual Contribution: 10%
- Board Contribution: 2%

2019 Community Impact vs. Operational Expenses

- CF Assets: $709,823 from Community Emergency Relief Fund facilitated giving for 416 Fire relief and support
I moved to Durango 12 years ago to enter a new chapter of my life. I had lost my husband to a cardiac virus. In addition to an enormous emotional transition, there was a financial transition. I needed to go through tedious legal document review and revision, including a charitable trust. Because of changes and closures of named charities, I ended up making cumbersome amendments to the trust several times within just one year.

I had an elementary familiarity with community foundations through my nonprofit work, so I turned to our local Community Foundation for better options. My meeting with the executive director, Briggen Wrinkle, led immediately to my setting up a donor advised fund. I then learned of the opportunity to include the Community Foundation in my estate planning, to further benefit my giving plan. I named the Foundation as the recipient of and administrative advisor for distribution of my charitable trust, upon my incapacity or death.

My legacy committee is made up of my adult children and my financial advisor, with consultation from the Community Foundation. Working together, this committee will have the benefit of the wise guidance of the Community Foundation to settle my affairs. This work will be based on my thorough, established philanthropic history with the Community Foundation. My children will use this history to make decisions about how, when and where to distribute my trust. Naming the Community Foundation in one’s planned giving avoids the need to make legal amendments in what can be an ever-changing nonprofit world.

In addition, there are significant benefits to having local, face-to-face conversations and philanthropic review with someone you trust. The Community Foundation simultaneously has the best interest of the nonprofit sector and the philanthropic sector, all under one roof. The value of my peace of mind and ease of using my giving history, while ensuring meaningful distributions into the future, cannot be emphasized enough.

This realm of one’s life includes serious and challenging decision making. Having local vetting of nonprofits and in-person advisement is an invaluable benefit. In addition, after having been an executor twice now, there is relief knowing my children will have a much easier road ahead in continuing my legacy.

I have enjoyed a rigorous and satisfying relationship with the Community Foundation, five years of which I happily served on the Board of Directors. I encourage each of you to consider how the Community Foundation could help you with your legacy.

—Kathleen Adams

Leverage Your Legacy with the Community Foundation

How can you maximize strategic investments now and into the future?

Residual Gifts
This estate gift goes to the Community Foundation and other charities after your estate expenses and other gifts are paid.

Bequests, Life Insurance & Retirement Plan Gifts
With specific language in your will or trust, you may donate cash, securities, life insurance and property.

Contingent Gift
The Community Foundation and other charities are named as a beneficiary upon contingency terms having been met.

Charitable IRA Rollover

Leverage Your Legacy with the Community Foundation

Planning Your Legacy: Bequests, Life Insurance & Retirement Plan Gifts

Residual Gifts
This estate gift goes to the Community Foundation and other charities after your estate expenses and other gifts are paid.

Bequests, Life Insurance & Retirement Plan Gifts
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Contingent Gift
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Contact your legal counsel or financial planner to learn more. Reach out to the Community Foundation for assistance with your legacy impact.