



2016 ANNUAL REVIEW

A LETTER FROM OUR EXECUTIVE DIRECTOR

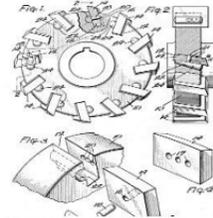
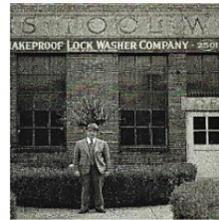
It is hard to believe that 2016 marked The Moniker Foundation's 18th anniversary! What seems like a substantial operating period though, in actuality, is just the beginning to a bright, philanthropic road ahead. I'd like to share my story with you as it relates to where we have been and where we are going.

Stacks upon stacks of scholarship applications overwhelmed our kitchen table growing up. Despite the portrayal of chaos though, Moniker was much more simple and clear-cut at the time. The idea was straightforward: award money to students in need and to nonprofits of choice; stick to the 5% requirement; and pay less attention to the impact achieved. After the years went by, the Board decided that providing funds here and there was not enough. Moniker needed to be more!

My true understanding of The Moniker Foundation did not become fully developed until my final year in college. Similar to most college students, I found myself rushed to figure it out. Get an internship, apply for relevant summer jobs...anything to boost future prospects upon graduation. As a Natural Resource major, I found that I'd rather be buried in the native grasses of Colorado than in paperwork. Yet, I quickly became aware of my purpose upon learning about the role that nonprofits play in serving the environment and moreover, the overall community needs not attended to by government funding.

1912

Inventor and family member helps start ITW



1998

Moniker is born with ITW stock

With my newfound realization, I applied for and was accepted to the El Pomar Fellowship Program. Two years as a Fellow strongly affirmed my purpose in the nonprofit sector. Yet, as the program wound down, I was at another critical juncture and I was hesitant to accept an offer to join the family business.

What would people think, did I have enough experience, and ultimately, would I be challenged? Would the Foundation ever be seen, externally, as more than just an easy job, more than just giving money away? Those were all questions racing through my mind. While the thoughts were indeed daunting, the opportunity to be a part of something holistic and to shape something sustainable for generations to come, prevailed the uncertainties. Needless to say, I jumped in with both feet.

Over these past three years, I have learned so much about myself, the organization and its future. We must be rooted, professional, and thoughtful in our philanthropy. Yet, we must remain flexible, lighthearted, and innovative to cultivate the next generation of Moniker philanthropists - our family. We must nurture our bottom line in order to grow and give more. We must listen to all of those in our spheres of influence - family, nonprofits, funders, and most importantly, communities. We must understand that philanthropy exists in layers of textures. We must attempt to serve philanthropy at each layer as it relates to our mission. Sure, the short answer is, we give money away. It's the long answer that I am eager to cultivate!

Happy reading!

♥Kathy

1998

First grants - \$16,000 to 3 organizations



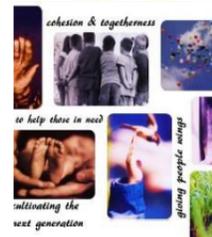
1999

First scholarships - \$14,400 to 7students



2014

First staff - a leap towards impactful programing



OUR PILLARS OF GIVING



● Grantmaking ● Scholarships ● Family Giving

GRANTMAKING

31 GRANTS · \$144,000 · 6 COLORADO COUNTIES



\$93,500
Education

\$50,500
Human Services

Advocates for Victims of Assault
AORN Foundation
Big Brothers Big Sisters - Pikes Peak
Boys and Girls Club of the Pikes Peak Region
Care and Share Food Bank for Southern Colorado
Colorado Springs Philharmonic
Colorado Springs Teen Court
Community Partnership for Child Development
DayBreak - An Adult Day Program
Discover Goodwill of Southern & Western Colorado
Durango Adult Education Center
Durango Community Shelter
Family & Intercultural Resource Center
Griffith Centers for Children
Innovations in Aging Collaborative
Junior Achievement of Southern Colorado
Keystone Science School
La Plata Youth Services
Manna - The Durango Soup Kitchen
Partners in Housing
Peak Education
Pikes Peak United Way
PILLAR Institute for Lifelong Learning
Project Angel Heart
Safe Passage
Silver Key Senior Services
SOS Outreach
Teach for America
The Resource Exchange
Urban Peak Colorado Springs
Women's Resource Center in Durango

SCHOLARSHIPS

39 SCHOLARS · \$69,500 · 3 PARTNER PROGRAMS



● Moniker Foundation

● Peak Education

● Summit Pre-Collegiate

● TRIO Talent Search



We have moved away from a traditional scholarship program to better ensure the success of students. We have found that first generation and low-income students often need strong wrap-around support services that focus on the whole student. Key services include mentoring, tutoring, financial aid assistance, parent engagement, and community leadership. We now partner with three programs that do just this. We provide scholarship funding, and program partners provide support services to students attending a post-secondary institution.

FAMILY GIVING

20 FAMILY GRANTS · 2 PIGGY BANKS · 1 HELPING HAND · 1 JUNIORS · 1 ANNUAL GIVING EVENT · \$68,370



\$52,000



\$870



\$500



\$5,000



\$10,000

● Family Giving Grants ● Feed the Piggy ● Helping Hands ● Juniors ● Annual Giving Program

A major priority for Moniker is instilling philanthropic values across generations. From as early as age six, family members are provided opportunities to help us with our grantmaking and giving. From filling piggy banks, to our Junior Board, to discretionary grants, we have philanthropic options for everyone.

FAMILY GIVING GRANTS

2016

\$5,200

\$26,000

\$20,800

0 \$5,000 \$10,000 \$15,000 \$20,000 \$25,000 \$30,000 \$35,000 \$40,000 \$45,000 \$50,000

● First Generation ● Second Generation ● Third Generation

FEED THE PIGGY

Ages 6-10



URBAN PEAK

Real life. Real change.



HELPING HANDS

Ages 10-15



JUNIORS

Ages 10-18

DURANGO
TRAILS
2000



SPRINGS RESCUE MISSION

neighbors helping neighbors



ANNUAL GIVING
PROGRAM

A LOOK AT OUR PIGGY

As of December 31, 2016

\$336,800
Expenses
&
Distribution



\$8.3 million
Net Assets

Income

Investment Income	\$518,900
Donations	\$513,400
Total Income	\$1,032,300

Expenses

Operating Expenses	\$72,200
Non-Qualifying Expenses	\$32,700
Program Expenses	
Scholarship Program	\$19,500
Program Partners	* \$50,000
Competitive Grants Program	\$144,000
Family Giving Program	\$68,370
Total Expenses	\$336,800
Total Net Income	\$695,500

* We recently switched our fiscal year to a calendar year. We awarded \$50,000 to our Scholarship Program Partners in December 2015, this amount is not included in the total expenses for 2016.



**A PRIVATE FOUNDATION PROVIDING RESOURCES FOR
EDUCATION AND WELL-BEING TO COLORADO COMMUNITIES**

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