2016 ANNUAL REVIEW
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.
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!

Katy
GRANTMAKING
31 GRANTS • $144,000 • 6 COLORADO COUNTIES

- 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
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.
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**

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

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**FAMILY GIVING GRANTS**

- **$52,000**
  - Dark blue: Family Giving Grants
  - Red: Feed the Piggy
  - Yellow: Helping Hands
  - Turquoise: Juniors
  - Purple: Annual Giving Program

**2016**

- **First Generation**: $5,200
- **Second Generation**: $26,000
- **Third Generation**: $20,800

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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.
FEED THE PIGGY
Ages 6-10

HELPING HANDS
Ages 10-15

JUNIORS
Ages 10-18

URBAN PEAK
Real life. Real change.

KIDS' PASTA PROJECT
Kids Serving Community

DURANGO TRAILS 2000
# A Look at Our Piggy

## As of December 31, 2016

### Income

<table>
<thead>
<tr>
<th>Income</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Investment Income</td>
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<tr>
<td>Donations</td>
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<td><strong>Total Income</strong></td>
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### Expenses

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Operating Expenses</td>
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<td>Non-Qualifying Expenses</td>
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<tr>
<td><strong>Program Expenses</strong></td>
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<tr>
<td>Scholarship Program</td>
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<td>Program Partners</td>
<td>*$50,000</td>
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<tr>
<td>Competitive Grants Program</td>
<td>$144,000</td>
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<tr>
<td>Family Giving Program</td>
<td>$68,370</td>
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<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$336,800</strong></td>
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<tr>
<td><strong>Total Net Income</strong></td>
<td><strong>$695,500</strong></td>
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</tbody>
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*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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