



2017 ANNUAL REVIEW



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

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WWW.MONIKERFOUNDATION.ORG**

A LETTER FROM OUR FOUNDATION LEADERSHIP

In our 19th term, Moniker took notable strides forward in what we would describe as a year of deep evaluation and marked progression. It was a journey colored with input from a variety of stakeholders which blended together to form a direction true to our roots, yet reflective of the sector's demands and needs. The resulting outcomes shaped, and will continue to guide, our philanthropic strategy moving forward.

Our philanthropic strategy - or more simply put - the way we choose to give, is positioned squarely between the intersection of flexible, family philanthropy and strategic, thoughtful philanthropy. In 2017, we celebrated an expanded philanthropic purpose. Inevitably, this expansion also brought on a few challenges.

The start of this expansion was prompted by thoughtful questions that built-out a clear, long-term direction, and subsequently helped determine if the current strategy was delivering the intended results. As a result, three key changes were made: two parallel foundation leadership positions were created to optimize the foundation's goals; our focus areas expanded with the addition of Arts & Culture and the Environment to better reflect family interests; and a new program was created to include an element of proactive, project-oriented philanthropy.

As can be expected with any notable change, we experienced a few unintended consequences. Our eagerness to expand and cast a wider net brought about a new series of questions pertaining to the true impact of our dollars. A single query formed: how can we best serve our communities with the dollars that we have? In other words, should we spread the peanut-butter or stick to a dollop?

Although simple in delivery, the answer is universally complex, continually changing, and never lacking debate. The road ahead, while planned and paved, will surely continue to be colorful. In the pages to come, we take a deeper dive into our philanthropy in 2017.

Happy reading!

Katy Rees & Drew Rees

OUR PILLARS OF GIVING



COMPETITIVE GRANTS PROGRAM

Our general grantmaking conduit that accepts online applications once a year from 501 (c)(3) organizations that operate within the state of Colorado. In 2017, Moniker solicited applications from organizations focusing in either Education or Human Services.

\$171,166 · 35 grants · 8 Colorado counties



26



7



2

● Program Support ● General Operating Support ● Capital Support



1



1



20



7



2



2

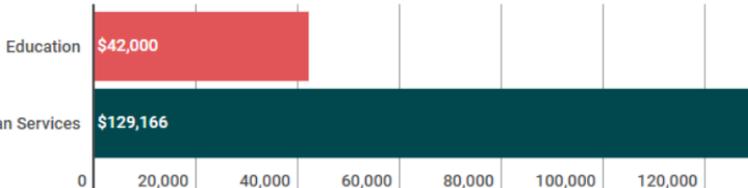


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● Garfield ● Eagle ● El Paso ● La Plata ● Summit ● Teller ● Denver ● Pueblo



- Advocates for Victims of Assault, Inc.
- Atlas Preparatory School
- Big Brothers Big Sisters of Colorado – Pikes Peak
- Boys & Girls Club of La Plata County
- Care and Share Food Bank for Southern Colorado
- CASA of the Pikes Peak Region
- Colorado Springs Conservatory
- Colorado Springs Philharmonic Orchestra
- Colorado Springs Teen Court
- Community Partnership Family Resource Center
- Community Partnership for Child Development
- DayBreak – An Adult Day Program
- Durango Adult Education Center
- Family & Intercultural Resource Center
- GRECCIO Housing
- Griffith Centers for Children
- Homeward Pikes Peak
- Housing Solutions for the Southwest
- La Plata Youth Services
- Partners in Housing, Inc.
- Peak Education
- Phoenix Multisport, Inc.
- Pikes Peak Hospice & Palliative Care
- Project Angel Heart
- Pueblo Zoological Society
- Roaring Fork PreCollegiate
- Safe Passage
- SOS Outreach
- Southwest Center for Independence
- TESSA
- The Greenway Foundation
- The iAM Music Institute
- The Resource Exchange
- Urban Peak Colorado Springs
- Volunteers of America Durango Community Shelter

SCHOLARSHIP PROGRAM

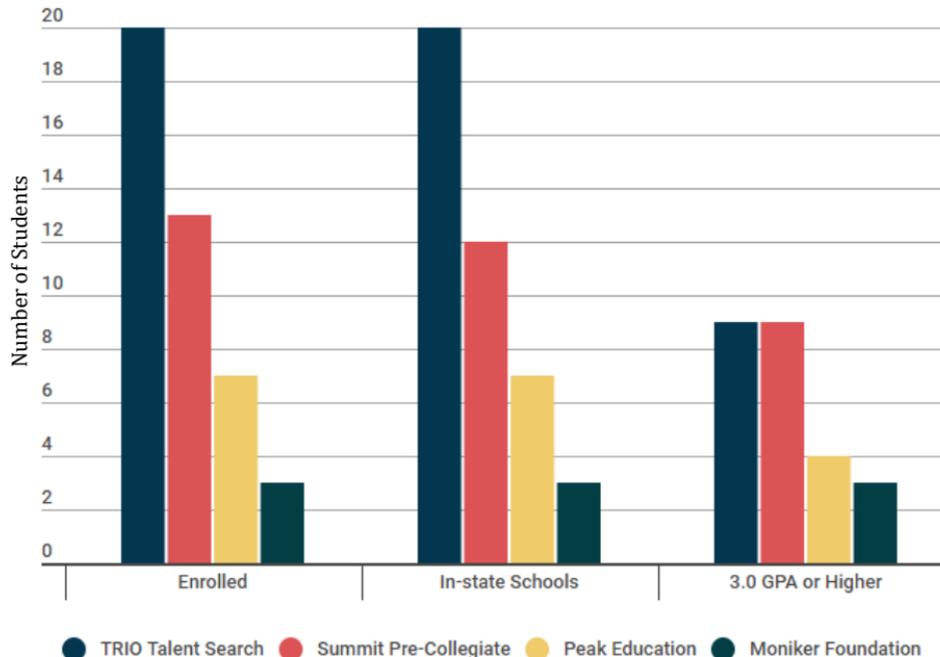
A formation of three partnerships with pre-collegiate programs from around the state that provide scholarships and wrap-around support to first generation and/or low-income students seeking post-secondary education.

\$74,000 · 43 scholars · 85% persistence rate

If we were to choose one word that best encapsulates the Scholarship Program in 2017, it would be “refine”! We accomplished this by rounding everyone up for a workshop to share experiences, offer feedback and brainstorm ideas for improvement. We removed some elements from the program structure, and we began improving processes with incremental changes tailored to each program partner. We learned how to promote a common goal, while maintaining customization. From there, we ran with the results and put that “refine” word into action.

It was a momentous year. There is more work to be done, as there always is, but we are headed in the right direction with our focus in the right places. Our gratitude and praise go to our wonderful program partners for making a real difference in the lives of the scholars!

Point in Time: Fall 2017



FAMILY GIVING PROGRAM

A comprehensive series of programming that engages the family in philanthropy, instills philanthropic values from an early age, and provides outlets for involvement and creative immersion.

\$51,290 · 20 family grants · 1 Annual Giving Grant · 1 Juniors Grant · 3 Matched Piggy Banks

Family Giving Grants



Family units gift discretionary grants to Colorado nonprofits of their choice. 20 family grants were distributed in 2017 for a total of \$40,000. This year, two family gifts were directed to the Giving Together co-funding collaborative.

Annual Giving Event



An experiential, philanthropic learning day is created once per year for family members. In 2017, family members worked with BookTrails in Steamboat Springs to build benches for their Reading on Ranches program. A \$5,000 grant further supported their mission.

Juniors



Junior Board members, ages 10 to 18, evaluate grant applications from pre-selected nonprofits. There With Care received the \$5,000 grant award in 2017.

Feed the Piggy



Youth, ages 6-10, practice the concepts of saving, growing, and giving money with a Moniker piggy bank. Moniker matches \$10 for every \$1 dollar saved. Three piggy banks were matched to support three nonprofits in 2017 for a total of \$1,290.

G.E.A.R. WORKS

Inspired by Lockheed Martin's Skunk Works®, G.E.A.R. Works is Moniker's newest program focusing on innovative, project-oriented, proactive philanthropy. It is a space to better understand overarching community needs and explore the solutions to address those needs alongside our Colorado service nonprofits.

\$20,215 · 3 community projects

Giving Together

\$3,500

Project Status: On-going



A fund situated at Pikes Peak Community Foundation that provides a space for co-funding amongst foundations or donor advised funds. In 2017, we worked alongside five local funders to provide a \$60,000 grant to Partners in Housing in an effort to further support transitional housing for homeless families with children.

Building Healthy Communities Collaborative

\$1,715

Project Status: On-going



The inspiration for this collaborative developed as Moniker became aware that rural communities across Colorado often have insufficient access to organic food sources. In partnership with Paonia Soil Co. and local organizations, Moniker brings module gardens and gardening education to rural communities.

Juntos for Education

\$15,000

Project Status: Complete



Originally a program supported under Teach for America in Colorado Springs, Juntos for Education is now an independent nonprofit that seeks to promote a community where leadership, financial assistance, and art come together to construct social and educational equity.

A LOOK AT OUR PIGGY

As of December 31, 2017

\$508,478
Expenses
& Distributions



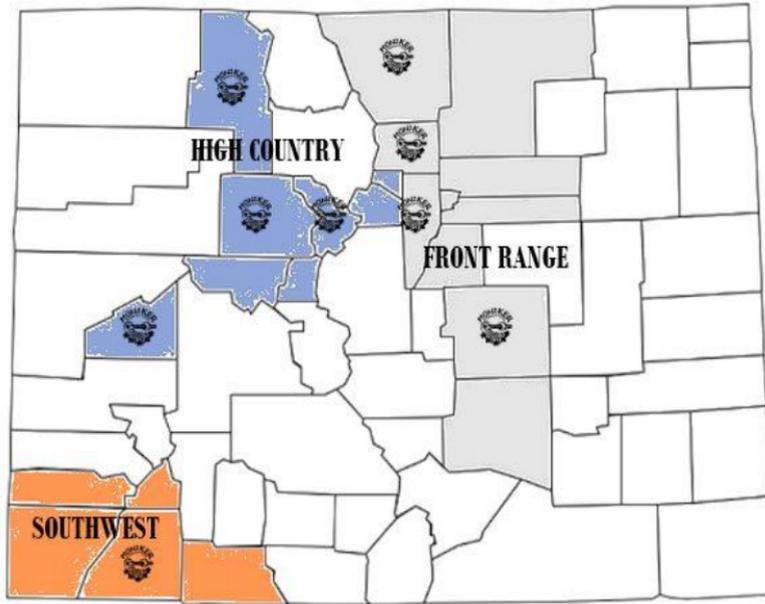
Income	
Investments	\$609,419
Donations	\$575,840
Total Income	\$1,185,259
Expenses	
Operating Expenses	\$93,702
Non-Qualifying Expenses	\$23,661
Program Expenses	
Competitive Grants Program	\$171,166
Scholarship Program	\$74,000
Family Giving Program	\$51,290
G.E.A.R Works	\$20,215
Donor Advised Fund *	\$74,444
Total Expenses	\$508,478
Total Net Income	\$676,781

* Our Donor Advised Fund provides family members an opportunity to donate to the Foundation and direct the use of funds to a qualifying 501(c)3.

The Foundation also engages in program-related investments. In December 2017, we made a \$150,000 low-interest loan to Discover Goodwill of Southern & Western Colorado.

THINGS TO LOOK OUT FOR IN 2018 & BEYOND

*We recently made significant changes to our Competitive Grants Program.
Please visit our website to learn more.*



Two major changes will affect organizations seeking to apply for funding through our Competitive Grants Program in our 2019 program year.

We have created a map to outline Moniker's priority funding regions. These regions were selected to better represent the communities where our family members reside. The board will now provide priority funding to the counties located in the High Country, Front Range, and Southwest regions, as shown on the map. Moniker will continue to accept applications from organizations residing throughout the state but will fund these requests less frequently.

Also beginning in our 2019 program year, we will be utilizing two funding cycles- split by focus area:

- Funding Cycle I - *Health & Human Services and Environment* – Application period October 1-31, 2018
- Funding Cycle II - *Education and Arts & Culture*. Application period March 1-31, 2019.

PICTURE THIS...

A few memories from 2017.





The Moniker Foundation
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