



2018 ANNUAL REVIEW

celebrating 20 years of giving



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

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A LETTER FROM OUR FOUNDATION LEADERSHIP

And just like that 20 years have flown by! So what have we accomplished in 20 years? Change – in the simplest form.

In 1998, The Moniker Foundation was created to simply give back to the community through supporting worthy organizations and post-secondary students. At this time, Moniker was doing, if we were to place a label on it, checkbook philanthropy. Checkbook philanthropy is spontaneous philanthropy – a response to an appeal for funding combined with personal values of what one deems to be a worthy cause.

Over the past 20 years, with specific attention to the last six years, Moniker has modified its philanthropic role in serving community needs. In our hope to be more intentional while remaining flexible, Moniker has adopted a blended philanthropic approach – reactive giving and proactive giving.

We value reactive philanthropy as it provides a way for us to act as the community chest for organizations that need resources more immediately. Yet, we also value proactive philanthropy as it allows the Foundation to be strategic and to understand the bigger community picture. Both approaches are also designed to meet nonprofits in their specific organizational lifecycles.

In 20 years, we have funded nearly 200 organizations, totaling \$1.8 million dollars. We have distributed \$1.2 million in academic and needs-based scholarship to over 400 students. To what end? We seek to achieve impact from our grantees work and to see our scholars on the road to tangible skills and job security. Since we are one step removed from the equation, impact is hard to measure. No, we haven't solved homelessness, ended food insecurity, or seen every one of our scholars graduate from college, but what we do know is that we are proud of the support we have been able to provide. We have made mistakes, learned, and modified. In a sense, philanthropy is just that.

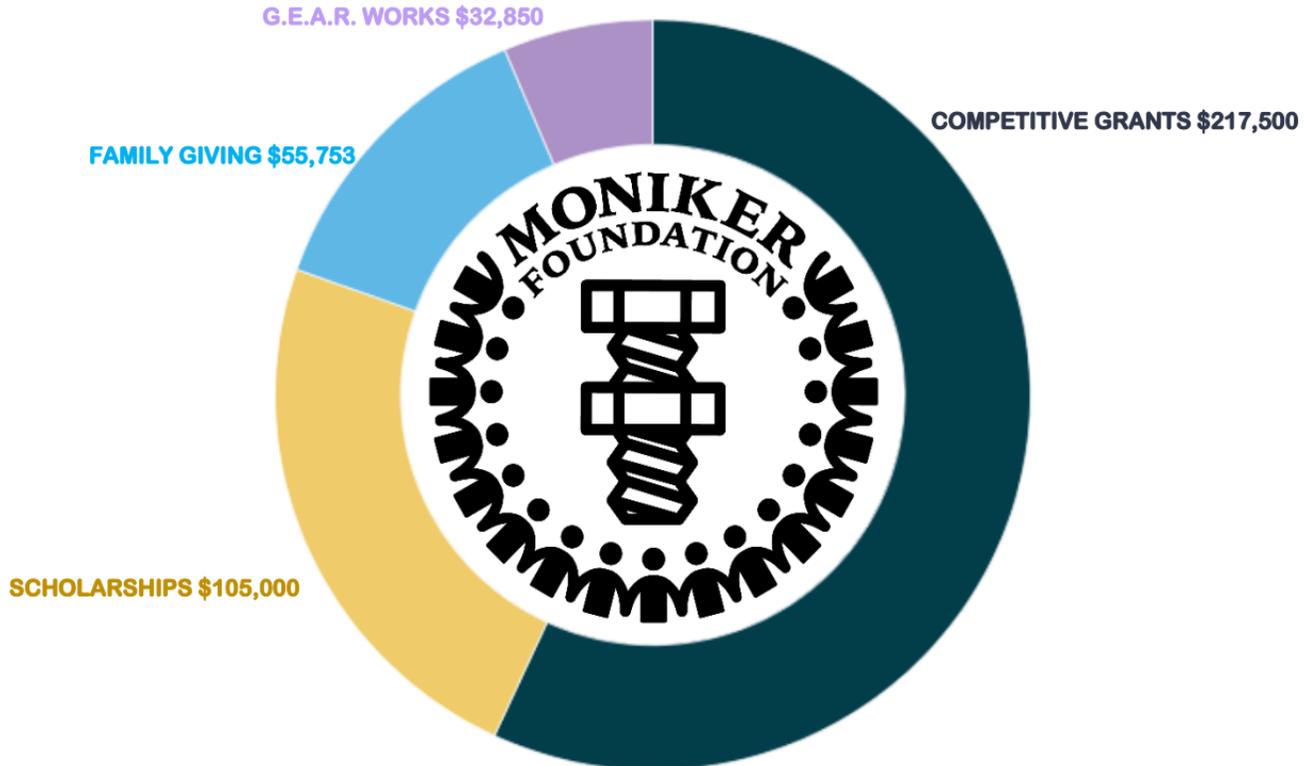
So, while we have modified our way of giving back, we remain tied to our roots. Our hope is to balance our philanthropy - to keep our family foundation flexible yet intentional.

Happy reading!

Your Family Foundation Leadership

OUR PILLARS OF GIVING

2018



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. Moniker solicits applications from organizations focusing on Education, Health & Human Services, Arts & Culture, and Environment.

\$217,500 · 37 grants · 10 Colorado counties

Health & Human Services

\$103,500 · 16 grants



Education

\$59,000 · 11 grants



Arts & Culture

\$30,000 · 6 grants



Environment

\$25,000 · 4 grants



● General Operating Support ● Program Support ● Project Support



● Boulder ● El Paso ● Denver ● Teller ● La Plata ● Jefferson ● Summit

● Bent ● Garfield ● Steamboat Springs

- Atlas Preparatory School
- Bent County Las Animas Community Center
- Big Brothers Big Sisters of Southwest Colorado
- CASA of the Pikes Peak Region
- Chief Theater
- Children's Literacy Center, Inc.
- Challenger Learning Center of Colorado
- Colorado Springs Conservatory
- Colorado Springs Philharmonic Orchestra
- Colorado Springs Pioneers Museum
- Colorado Springs Teen Court
- Community Connections, Inc.
- Community Partnership Family Resource Center
- DayBreak – An Adult Day Center
- Durango Adult Education Center
- Early Connections Learning Centers
- Housing Solutions for the Southwest
- Keystone Science School, Inc.
- Leadership Pikes Peak
- Mount Evans Home Health Care & Hospice
- Ormao Dance Company
- Palmer Land Trust
- Peak Education Inc.
- Pikes Peak Habitat for Humanity
- Safe Passage
- Silver Key Senior Services
- SOS Outreach
- Steamboat Art Museum
- TESSA
- The Greenway Foundation
- The Women's Resource Center in Durango
- There With Care
- Trails 2000
- Tri-Lakes Cares
- UCCS Aging Center
- Urban Peak Colorado Springs
- Women's Resource Agency

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.

\$105,000 · 55 scholars · 84% (80% goal) persistence rate

Summit Pre-Collegiate Breckenridge



Meet Isabel Serrano (left). Isabel is a freshman at Grand Canyon University studying Biology. After graduation, she plans to go to medical school in hopes of becoming a Regenerative Doctor. She is a part of her school's Pre-Med Club and was recently accepted into a Basic Clinical Skills Program.

Peak Education Colorado Springs



Meet Francina Costa, who just completed a very successful first year at the University of Colorado Colorado Springs, where she is majoring in Anthropology. She is an aspiring cultural anthropologist. During the Fall 2018 Semester she traveled with members of Tipi Raisers to the Pine Ridge Indian Reservation to help rebuild homes damaged in storms.

TRIO Talent Search Durango



Anakay Hanold graduated, magna cum laude, Spring 2019, with her bachelor's degree in Theater with a double emphasis in Performance and History/ Literature from Adams State University. Within days of her college graduation, Anakay moved to Denver to pursue a career in educational theater.

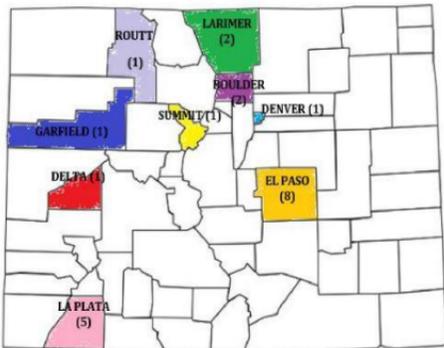
FAMILY GIVING PROGRAM

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.

\$55,753 · 22 family grants · 1 Annual Giving Grant · 4 Matched Piggy Banks

Family Giving Grants

\$44,000



Family units gift discretionary grants to Colorado nonprofits of their choice. In 2018, 22 family grants were distributed across nine Colorado counties for a total of \$44,000.

Annual Giving Event

\$5,000



An experiential, philanthropic learning day is created once per year for family members. In 2018, family members visited the Boys & Girls Club of La Plata County for a day of learning. A \$5,000 grant further supported their mission.

Feed the Piggy

\$6,753



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. Four piggy banks were matched to support four nonprofits for a total of \$1,340. Through this program, we have also created a philanthropic children's book series that explores giving back.

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.

\$32,850 · 3 community projects

Giving Together

\$10,000

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 2018, we worked alongside six local funders to provide a \$70,000 grant to Fostering Hope to further support Transitional Housing that provides trauma-informed care for youth and/or families with children transitioning to independent living.

Building Healthy Communities Collaborative

\$14,500

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.

High Country Community Needs Assessment

\$8,350

Project Status: Complete



We are committed to creating a space for family members to explore their philanthropic passions as they relate to our mission. In 2018, a third-generation family member assisted the Foundation in conducting a Community Needs Assessment of the High Country Region. The findings paved a new regional giving approach for Moniker – to be launched in 2020!

A LOOK AT OUR PIGGY

As of December 31, 2018

\$590,476
Expenses
& Distributions



Income	
Investments	\$337,139
Donations	\$698,935
Total Income	\$1,036,074
Expenses	
Operating Expenses	\$107,337
Non-Qualifying Expenses	\$15,566
Program Expenses	
Competitive Grants Program	\$217,500
Scholarship Program	\$102,000
Family Giving Program	\$55,753
G.E.A.R Works	\$32,850
Emergency Grants	\$10,000
Donor Advised Fund *	\$49,470
Total Expenses	\$590,476
Total Net Income	\$445,598

* 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.

THINGS TO LOOK OUT FOR IN 2019 & BEYOND

We are in the process of making significant changes to our Foundation's giving structure.



Foundation Structure

We are moving to regional giving structure in 2020! While our Pillars of Giving will remain intact, each pillar will garner a regional lens and regional dollars. Our Board and Staff have implemented this new strategy to:

1. Better serve communities where family members reside.
2. To better understand community needs and Moniker's role in supporting those needs
3. To build relationships and support systems for nonprofits.
4. To encourage active participation by family units.

Competitive Grants Program

Also, beginning in 2020, we will be utilizing three Competitive Grants Funding Cycles that correspond to each of the three priority regions. Foundation Leadership in each region will be responsible for communicating specific funding priorities and funding application processes to organizations. Please look for structure changes on our website in August 2019!

MEET OUR FOUNDATION LEADERSHIP

Please take a few minutes to meet our Foundation Leadership! Each staff person is now specifically assigned to serving one of our three priority regions in Colorado!

Katy Rees
Pikes Peak Region



Since joining the Foundation five years ago, I have come to truly understand the messiness that is cultivated by philanthropy. While it's human nature to formalize structures and process, I learned that philanthropy, at its best, is just that – philanthropy. Philanthropy, grown from the heart and relationship-based, often garners a greater sense of impact. Sometimes at the end of the day, we must trust organizations to do what they do best and walk alongside them to truly understand our role as funders.

Drew Rees
Southwest Region



Philanthropy, for me, is somewhat of a challenging conundrum. We aren't working on the exploration of Mars here at Moniker, but we are working in the absence of absolutes – the greyest of areas between the qualitative and the quantitative. It's a perplexing pursuit stuck in between the tried and true and a new era of progressive thinking. And, as it turns out, I kind of love that. Moniker is all about experimentation and adaptability, and that keeps me yearning for more. Although I did not foresee this direction for myself, I am glad that I made the dive!

Rachel Sinton
High Country Region



I am excited to join the Moniker team. The Foundation allows me to be a part of something bigger than myself - to truly contribute to my community through a community driven approach. I look forward to partnering with local nonprofits in the High Country Region to support change. I live by the quote of Nelson Mandela, "We must use time wisely and forever realize that the time is always ripe to do right."



The Moniker Foundation
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