



COLORADO  
ASSOCIATION OF  
FUNDERS

**BUILDING CONNECTIONS.  
STRENGTHENING PHILANTHROPY.**

2018 Annual Report

Dear Colleagues:

It has been another record-breaking year – both for our organization and our network.

Our staff size increased to four from two, and our 2019 budget is expected to be almost twice as big. We offered almost 90 opportunities for our members to engage, learn and network, with some participants telling us our programs are more relevant than ever. And with a total of 89 new and returning members, attendance at our annual meeting reached its highest level in at least the past decade.

Thanks to the support of our generous members, annual dues revenue climbed to a record high in 2018 and overall grant proceeds more than doubled, largely because of the commitment of ten members to fund a full-time position to build and facilitate a Rural Funders Learning Network.

We are also excited to share that the board has finalized and adopted new guidelines that will allow us to expand our reach to include several new membership categories that reflect the evolving and growing field of philanthropy.

The following pages provide more details about our leadership in convening foundations and nonprofits to explore the topic of openness, as well as our efforts to inform the field and advocate for a fair and accurate census count. Both of these initiatives received financial support from our valued national network, United Philanthropy Forum.

Our advocacy work continues to expand and we are laying the groundwork for collaboration with the many new statewide elected and appointed officials, as well as maintaining connections with our Congressional delegation to increase visibility and promote understanding about our sector.



*At our Annual Meeting at the Governor's Mansion, Board Chair Mark D. Andersen presents Gov. John Hickenlooper with a "proclamation" on his many interactions and partnerships over the years with our members and our statewide network. Mark logged many thousands of miles driving back and forth from Steamboat Springs to our leadership programs and board meetings, never missing a single one during his several years of service. He continues as Immediate Past Board Chair through the end of 2019.*

We are extremely grateful to our board, staff, volunteers and partners for their vision and leadership as we continue to strengthen our ability to serve Colorado's dynamic and diverse philanthropic sector.

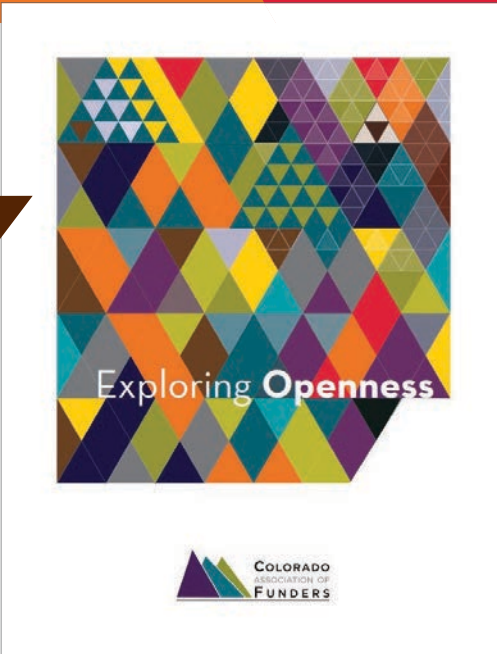
Best,

Joanne Kelley  
Chief Executive Officer

Mark D. Andersen  
Board Chair

In reaffirming our strategic road map, we continue to focus on three key goals: **strengthen the field**, **promote a strong sector**, and **maintain a healthy organization**. Within these focus areas, here are highlights from 2018:

- ▲ With input from a cohort of 12 foundation and nonprofit leaders, we published “Exploring Openness.” The reflections inspired the theme for the 2018 C(3) Forum convening hundreds of professionals around the topic of strengthening relationships and providing feedback.
- ▲ We added three new peer groups—the Arts & Culture Funders Group, Information Technology Roundtable, and Rural Funders Learning Network—to help members forge meaningful connections across roles and issue areas.



# 2018 HIGHLIGHTS



- ▲ We piloted a new “two-track” program format to provide a deep dive into critical issues such as housing and the opioid epidemic, followed by time for members to connect and exchange funding strategies.
- ▲ We held two programs about Census 2020, one exclusively for funders and another one in partnership with others and designed for funders, nonprofits, community members, and business and government representatives.
- ▲ We welcomed nine new and former members—Comcast, Community Foundation of the San Luis Valley, Department of Local Affairs (DOLA), The Donor Alliance Foundation, Elevations Foundation, Great Outdoors Colorado (GOCO), PNC Bank, Southern Colorado Community Foundation, and The Telluride Foundation—and the board approved expanding membership to new categories including donor-advised fund holders, giving circles, and individual philanthropists. An associate member category has been created for professional advisors.

*A.V. Hunter Trust, Inc. staff at Colorado's Opioid Crisis program in October.*

# PEER CONNECTIONS

In 2018, Colorado Association of Funders facilitated more than 85 hours of peer-to-peer learning and networking.

**“To bring people, information and resources together to promote effective and responsible philanthropy in Colorado.”**

Of the many ways we work to fulfill this mission statement (on the left), we’ve found peer groups and learning networks to be one of the most promising strategies. Meaningful connections between funders allows for sharing best practices, opportunities, and lessons learned; coordinating presence; and when appropriate, collaboration.

In 2018, we added three new peer groups:

The **Arts & Culture Funders Group** provides a space for funders to share projects, creative funding approaches, and opportunities to collaborate. In 2018, the group focused on brainstorming and researching trends in investments, partnerships, and collective funding.



The **Information Technology Roundtable** is a peer group for members interested in connecting with other foundation professionals about the latest in IT and cyber security. In the ever-changing landscape of IT, this peer group provides a supportive environment to exchange information and updates on best practices.



A core group of member foundations have invested in the creation of a network structure aimed at better serving the needs of rural communities and addressing pressing challenges in rural Colorado. With the hiring of a full-time director in late 2018, the **Rural Funders Learning Network** began convening regularly for active peer learning, networking, and sharing of information. Goals also include: identifying innovative approaches and funding strategies, while fostering partnership opportunities among funders. There is also the opportunity for funders to work together on the larger, systemic issues affecting rural Colorado. All funders are invited to participate in the effort, which is guided by an advisory committee that meets frequently and includes leaders from Aspen Community Foundation, Boettcher Foundation, Caring for Colorado Foundation, The Colorado Health Foundation, The Colorado Trust, Delta Dental of Colorado Foundation, Donnell-Kay Foundation, Gates Family Foundation, Great Outdoors Colorado, Orton Family Foundation and Telluride Foundation. In late October, Aspen Community Foundation hosted the first official network convening in Basalt, which featured learning about key data on the region and lessons learned on ACF’s Cradle to Career initiative. A webinar in December attracted dozens of members wanting to learn more about how to play a role in supporting new Opportunity Zones.



The new Arts & Culture Funders Group (top) recently met in Denver, Colorado Springs, and Fort Collins, while the RFLN had its first convening in Basalt at the Aspen Community Foundation (above).

# ADVOCACY & POLICY

Colorado Association of Funders continues to enhance its ability to advocate for the sector, receiving high marks in a national assessment of our capacity to work strategically in this key program area.

Among the accomplishments and activities this year:

- ▲ The Public Policy Committee and Board’s backing of an annual policy agenda that included new positions in favor of a fair and accurate decennial census count and support for a variety of existing and new state tax credits;
- ▲ Annual address to funders by Colorado Gov. John Hickenlooper;
- ▲ The establishment of the Joseph Nord Ignat Memorial Endowed Fund (invested at Community First Foundation) whose proceeds will go toward supporting an annual policy-related activity for members;
- ▲ CEO testimony (along with other Member CEOs) at State Capitol in favor of legislation encouraging charitable giving;
- ▲ A joint advocacy day at the State Capitol in partnership with nonprofits organizations;
- ▲ Written comments to the IRS/Treasury on a multitude of pending rules related to donor-advised funds, as well as comments filed on regulations affecting existing Colorado tax credits that encourage significant giving to nonprofit organizations;
- ▲ Led diverse annual delegation of Colorado foundation executives to Washington for Foundations on the Hill visits with all of our Senators and Representatives in Congress. These meetings emphasized the sector’s significant support of communities throughout Colorado, while also urging lawmakers to support the continued enforcement of current law that bars 501(c)(3) charitable organizations from endorsing, opposing or contributing to political candidates or engaging in partisan campaign activities.



(Left) Advocacy Day at State Capitol; From L to R: Members Louise Myrland, Women’s Foundation of Colorado; Kynnie Martin, Xcel Energy, and Policy Committee Co-Chair Alece Montez, Orton Family Foundation. (Above) Policy Co-Chair Megan Ledin of Grand Foundation visits with Congressman Jared Polis in DC.



*Board Members Gary Steuer, Bonfils-Stanton Foundation, and Tariana Navas-Nieves, Denver Arts & Venues, listen to panel of experts analyzing the 2018 elections at Annual Meeting in November.*

**Mark D. Andersen, *Chair*** | Executive Director, Yampa Valley Community Foundation

**Amy Latham, *Vice Chair*** | Vice President, Philanthropy, The Colorado Health Foundation

**Gary Steuer, *Secretary*** | President and CEO, Bonfils-Stanton Foundation

**Ned Calonge, *Treasurer*** | President and CEO, The Colorado Trust

**Jandel Allen-Davis** | Vice President, Government, External Relations and Research, Kaiser Permanente

**Heather Carroll** | President, Joseph Henry Edmondson Foundation

**Anne Garcia** | Chief Financial and Operating Officer, Rose Community Foundation

**Alece Montez** | Director of Programs, Orton Family Foundation

**Tariana Navas-Nieves** | Director of Cultural Affairs, Denver Arts & Venues

**Ruth Rohs** | Executive Director, IMA Foundation

**Virginia Romano** | Executive Director, Vera and Joseph Dresner Foundation

**Abel Wurmnest** | Executive Director, Anschutz Family Foundation

# 2018 COLORADO ASSOCIATION OF FUNDERS **BOARD OF DIRECTORS**

In addition to the board members, we'd like to thank our many volunteers and supporters who make our work possible:

## 2018 PEER GROUP CHAIRS

### **Arts & Culture Funders Group**

Bryce Merrill | Bohemian Foundation  
Gary Steuer | Bonfils-Stanton Foundation

### **Community Foundation CEO Network**

Lindy Eichenbaum Lent | Rose Community Foundation  
Eric Hozempa | Longmont Community Foundation

### **Early Childhood Funders Network**

Beverly Buck | Aloha Foundation  
Doug Elliott | Daniels Fund  
Tiffany Perrin | ZOMA Foundation

### **Executive Admin Group**

Cindy Kennedy | Adolph Coors Foundation  
Monica Woods | Delta Dental of Colorado Foundation

### **Funders Learning Network on Early Childhood Mental Health**

Cara Bradbury | ZOMA Foundation  
Katelyn Lammie | Caring for Colorado Foundation

### **Human Resources/Operations Group**

Maria Hannon | The Colorado Health Foundation  
Emma Schwarz | Rose Community Foundation

### **Impact Investing Forum**

Ben Bynum | The Colorado Health Foundation  
Sue Dorsey | Gates Family Foundation  
Kate Lyda | The Denver Foundation



*Our quarterly Impact Investing Forum, co-chaired by Dr. Ben Bynum, The Colorado Health Foundation, and Sue Dorsey, Gates Family Foundation, is one of many peer-to-peer learning groups Colorado Association of Funders helps to facilitate throughout the year.*

### **Rural Funders Learning Network**

Tony Lewis | Donnell-Kay Foundation  
Paul Major | Telluride Foundation

### **The Leadership Forum**

Karen McNeil-Miller | The Colorado Health Foundation  
Christine Márquez-Hudson | The Denver Foundation

### **Small Funders Peer Group**

Ali Mayer | Mayer-Phillips Foundation  
Kristi Petrie | AJL Charitable Foundation

*Leadership Cohort of foundation and nonprofit leaders meets for a year to explore the topic of "openness" in our sector.*



### **Public Policy Committee**

Megan Ledin | Grand Foundation (co-chair)  
Alece Montez | Orton Family Foundation (co-chair)  
Linda Childears | Daniels Fund  
Sue Renner | David and Laura Merage Foundation  
Virginia Romano | Vera and Joseph Dresner Foundation  
Tamara Tormohlen | Aspen Community Foundation  
Marla Williams | Community First Foundation

### **Rural Funders Learning Network Advisory Committee**

Tony Lewis | Donnell-Kay Foundation  
Paul Major | Telluride Foundation  
Ned Calonge | The Colorado Trust  
Chris Castilian | Great Outdoors Colorado  
Allison Cusick | Delta Dental Foundation of Colorado  
Katie Kramer | Boettcher Foundation  
Laia Mitchell | Gates Family Foundation |  
Alece Montez | Orton Family Foundation  
Sara Overby | The Colorado Health Foundation  
Tamara Tormohlen | Aspen Community Foundation  
Chris Wiant | Caring for Colorado Foundation

### **Leadership Cohort**

Jim Chavez | Latin American Educational Foundation  
Maria Fabula | Community Resource Center  
Anne Garcia | Rose Community Foundation  
Amy Latham | The Colorado Health Foundation  
David Livingston | Arapahoe/Douglas Mental Health Network  
Christine Márquez-Hudson | The Denver Foundation  
Alece Montez | Orton Family Foundation  
Lydia McCoy | Colorado Nonprofit Association  
Michaelle Smith | Hilltop Community Resources  
Gary Steuer | Bonfils-Stanton Foundation  
Jeannine Truswell | United Way of Weld County  
Abel Wurmnest | Anschutz Family Foundation

# 2018 VOLUNTEER LEADERS

### **Program Planning**

Monica Abrahams | Caring for Colorado Foundation  
Raymael Blackwell | Community First Foundation  
Ryan Campbell | A.V. Hunter Trust, Inc.  
Whitney Connor | Rose Community Foundation  
Doug Elliott | Daniels Fund  
Elsa Holguin | Rose Community Foundation  
Cindy Kellogg | TEGNA Foundation  
Sara Maranowicz | Bohemian Foundation  
Jenn Moe | Donor Alliance Foundation  
Alece Montez | Orton Family Foundation  
Emily Orbanek | Great Outdoors Colorado  
Katie Parker | Animal Assistance Foundation  
Emma Schwarz | Rose Community Foundation  
Denise Whinnen | Gill Foundation

### **2018 Foundations on the Hill Delegation**

Heather Carroll | Joseph Henry Edmondson Foundation  
Alexis Halbert | Orton Family Foundation  
Sarah Harrison | The Denver Foundation  
Megan Ledin | Grand Foundation  
Tony Lewis | Donnell-Kay Foundation  
John Loewy | The Denver Foundation  
Christine Márquez-Hudson | The Denver Foundation  
Dace West | The Denver Foundation





## 2018 PROGRAM PANELISTS

### State of the Sector

Jehan Benton-Clark | The Colorado Health Foundation  
Tamara Tormohlen | Aspen Community Foundation (*pictured above*)

### Colorado's Housing Landscape and How Foundations Are Responding

Bruce Hoyt | Gary Community Investments  
Megan Ledin | Grand Foundation  
Julie Lerudis | Boettcher Foundation

### C(3) Forum

Mark D. Andersen | Yampa Valley Community Foundation  
Noah Atencio | Community First Foundation  
Erin Atwell | Community Shares of Colorado  
Letty Bass | Merle Chambers Fund  
Lori Bellingham | El Pomar Foundation  
Cari Davis | Colorado Springs Health Foundation  
Elsa Holguín | Rose Community Foundation  
Eriz Hozempa | Longmont Community Foundation  
Amy Latham | The Colorado Health Foundation  
Tony Lewis | Donnell-Kay Foundation  
Alece Montez | Orton Family Foundation  
Alison Friedman Phillips | Women's Foundation of Colorado  
LaDawn Sullivan | The Denver Foundation  
Abel Wurmnest | Anschutz Family Foundation

### Learning from the Field - Perspective on Equity in Funding

Noelle Dorward | The Colorado Trust  
Theo Gregory | El Pomar Foundation  
Lynnette Namba | Kaiser Permanente  
Tariana Navas-Nieves | Denver Arts & Venues  
Gary Steuer | Bonfils-Stanton Foundation  
LaDawn Sullivan | The Denver Foundation

### Colorado's Opioid Crisis - Understanding Challenges, Exploring Solutions

Owen McAleer | Daniels Fund  
Khanh Nguyen | The Colorado Health Foundation  
Mike Roque | Community Foundation of the San Luis Valley

Thanks to the following members who provided leadership gifts and additional contributions in 2018:

The Colorado Trust  
The Colorado Health Foundation  
Donnell-Kay Foundation  
Anschutz Family Foundation  
Aspen Community Foundation  
Boettcher Foundation  
Caring for Colorado Foundation  
Community First Foundation  
Gates Family Foundation  
Orton Family Foundation  
Telluride Foundation  
Bonfils-Stanton Foundation  
Delta Dental of Colorado Foundation  
The Denver Foundation  
Vera and Joseph Dresner Foundation  
The Anschutz Foundation  
Denver Arts & Venues  
A.V. Hunter Trust  
Joseph Henry Edmondson Foundation  
The LARRK Foundation  
Mayer-Phillips Foundation  
The Edmund T. and Eleanor Quick Foundation



The Colorado Association of Funders provides education and advocacy in support of the diverse spectrum of philanthropic organizations throughout the state.

Joanne Kelley | CEO

Amy Swiatek | Director of Rural and Statewide Networks

Mari Tanabe | Program and Membership Manager  
(through November 2018)

Jaser Alsharhan | Senior Program Associate

Anna Metropulos | Program Associate

## COLORADO ASSOCIATION OF FUNDERS STAFF

**Contact us:** [caf@coloradofunders.org](mailto:caf@coloradofunders.org)

**Visit:** [coloradofunders.org](http://coloradofunders.org)

For information on [our financials](#) and a full list of [our members](#), please visit our website.