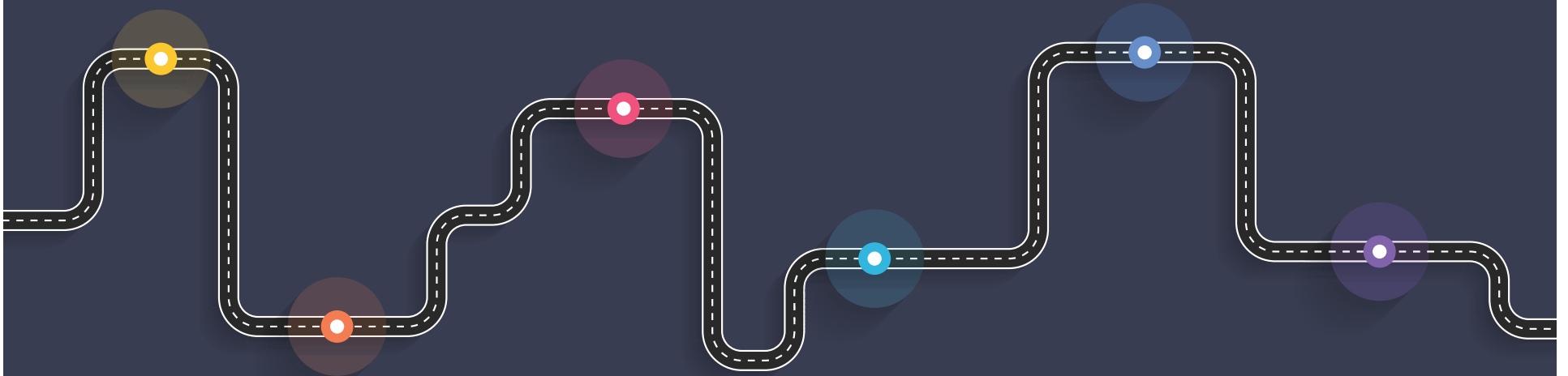


The ROADMAP (2020-2023)



Dear Colleagues:

Over more than 50 years, Philanthropy Colorado has played a variety of roles for the organizations that make up our statewide network. We have been **asked to serve** — by convening people with the resources and connections members need to meet their missions. We've also been **compelled to lead** and shape the philanthropic landscape and our place within it.

When it was time to update our strategic roadmap in early 2020, we acknowledged the tension around the question of our role: lead or serve? At the same time, an onslaught of unprecedented and historic events compelled us to think critically and carefully about the evolving needs of our members and the communities we all serve.

“We determined that now is the time for us to embrace equity and inclusion as imperatives.”

We turned to our members, partners and advisors to help us imagine the future and the role of Philanthropy Colorado. We heard overwhelming support for an equal emphasis on both leading and serving. And we heard loud and clear that we needed to embrace equity, diversity and inclusion as imperatives for our network and as the outcomes Colorado communities deserve. As we embark on the second phase of the roadmap that has guided our work in recent years, we wanted to look back to capture some of the steps along the way.

It's our hope that future leaders, boards, teams and the field will deepen their commitments and continue to advance these efforts because there is clearly far more to do as we move toward our vision of an equitable and sustainable future for Colorado.

On behalf of our board and team members throughout these past few years, we'd like to express our deep gratitude and appreciation to everyone who has been on the journey with us.

In partnership,

Joanne Kelley | Philanthropy Colorado | CEO | 2009-2024

Amy Latham | The Colorado Health Foundation | Philanthropy Colorado Board Chair | 2019-2020

Gary Steuer | Bonfils-Stanton Foundation | Philanthropy Colorado Board Chair | 2021-2022

Tariana Navas-Nieves | Denver Arts & Venues | Philanthropy Colorado Board Chair | 2023-2024



Thank you to the Philanthropy Colorado board members who served during the various stages of our strategic roadmap process (2020-2023)

- Raymael Blackwell | Caring for Denver Foundation
- Ned Calonge | formerly with The Colorado Trust
- Heather Carroll | Joseph Henry Edmondson Foundation
- Renee Ferrufino | The Women's Foundation of Colorado
- Tatiana Hernandez | Community Foundation Boulder County
- Jeff Hirota | formerly with Community Foundation Boulder County
- Katie Kramer | Boettcher Foundation
- Amy Latham | The Colorado Health Foundation
- Megan Ledin | Grand Foundation
- Tariana Navas-Nieves | Denver Arts & Venues
- Kristi Petrie | AJL Foundation
- Morris Price | The Colorado Trust
- Virginia Romano | Vera and Joseph Dresner Foundation
- Ellen Sandberg | PNC Bank Foundation
- Gary Steuer | Bonfils-Stanton Foundation
- LaDawn Sullivan | Black Resilience in Colorado Fund | The Denver Foundation
- Tamara Tormohlen | formerly with Aspen Community Foundation
- Victoria Nava-Watson | formerly with Great Outdoors Colorado
- Abel Wurmnest | Anschutz Family Foundation

THE WHY

As a **global health pandemic, an economic crisis, unprecedented wildfires**, and a **reckoning with racial injustice** collided in 2020, we engaged in a process to imagine the future and role of Philanthropy Colorado. **We listened to members** in 2020 as we developed our strategic direction for 2021-2022 and we did so again in 2023 as we worked to determine the next phase.

THE HOW

We heard overwhelming support for **continuing the commitment to equity** as a priority through our values, operations, governance, programming and advocacy. We **still have much to learn** and accomplish as we **work toward a future where all of our missions are realized** and **all communities thrive**.

THE WHAT

Our strategic equity roadmap has been organized around three goals:

- #1** Advance equity by setting a leadership example and cultivating opportunities for shared learning and action
- #2** Create fresh momentum for expanding advocacy and policy work
- #3** Commit resources to support cultural change and collaboration

Two comprehensive surveys identified common ground in our diverse network:

2020: Members directed us to focus on leading AND serving

2023 confirmed overwhelming support for these priorities:

- Continuing the commitment to equity as a priority;
- Aspiring to provide spaces for honest and open conversations;
- Supporting connection between and among members, who value learning with others in the field;
- Advancing effective engagement in rural Colorado; and
- Promoting advocacy and policy change as important levers in solving pressing problems.

Roadmap Goal #1

ADVANCE EQUITY BY SETTING A LEADERSHIP EXAMPLE AND CULTIVATING OPPORTUNITIES FOR SHARED LEARNING AND ACTION

Our roadmap called on us to lead by setting an example of what philanthropy can be and to serve by providing necessary resources to the diverse, vibrant community of philanthropic organizations and individuals committed to investing in Colorado's future. We placed a priority on proactively providing information – by bringing in experts, trainings, briefings and posting curated links, examples and other resources in a special equity section on our website for those looking to learn more or share their work. (Our extensive internal work related to this goal is summed up in goal #3.) We invited our members to join us on a journey of values-driven discovery, reflection and partnership to achieve equity and sustainability for Colorado communities.

Formalizing relationships with ABFE, Trust-Based Philanthropy Project and other partner organizations allowed us to bring expertise into the network to increase understanding about system inequities and how grantmaking could make a difference.

Throughout the prolonged pandemic, we created numerous online forums for members to share and discover the impact on communities and populations with the greatest challenges and fewest resources.

Other examples:

- Marking our 50th anniversary milestone with a celebration featuring a keynote by Heather McGhee, author of the bestselling *The Sum of Us: How Racism Costs Everyone and How We Can Prosper Together*.
- Engaging indigenous leaders for a series of conversations with grantmakers about the impacts of climate change on tribal communities and explored opportunities for partnerships and scaling up indigenous practices for community resilience in the face of disasters.
- Presenting “Emerging Models for Creating a More Inclusive Colorado Economy,” “Exploring Digital Literacy and Inclusion: What’s working and how we can build equitable communities,” and “The State of Impact Investing in Colorado and Beyond.”



We also wanted to build on the success of our growing rural and statewide networks by providing leadership and spaces for open and honest outcome-driven conversations, joint learning and action to address gaps and invest equitably in opportunities across the state. Our already robust peer learning networks provided spaces for introducing equity, diversity and inclusion considerations in to conversations, topics, speakers and leadership opportunities. A rural equity cohort focused on the economically challenged San Luis Valley region and another aimed at bringing broadband to more communities have been among the many ways members have come together for collective learning and action.

A complete list of current and past programs is [available here](#).

A decade in the making

Philanthropy Colorado began its collaborative equity journey in a decade ago, building and expanding on the efforts internally with the team and board on a mix of culture, operational change and governance. Its external work with members and stakeholders can also be traced over the same period of years through information briefings, trainings, speakers and resources. Surveys and focus groups and too many partners to name helped to inform the milestones summarized in this timeline.

EXTERNAL

INTERNAL

2014 Continued partnership and joint programs with Colorado Funders for Inclusiveness and Equity (Philanthropy's role in addressing neighborhood gentrification)

Staff learning journey continues through United Philanthropy Forum network, ABFE

2016 Board retreat includes CEO-led exploration of national, state trends on equity in philanthropy

2017

- Equity Convening for members with national, local experts
- C3 Forum on Equity; ABFE training on history of systemic racism
- Powering Partnerships keynote featuring blogger Vu Le

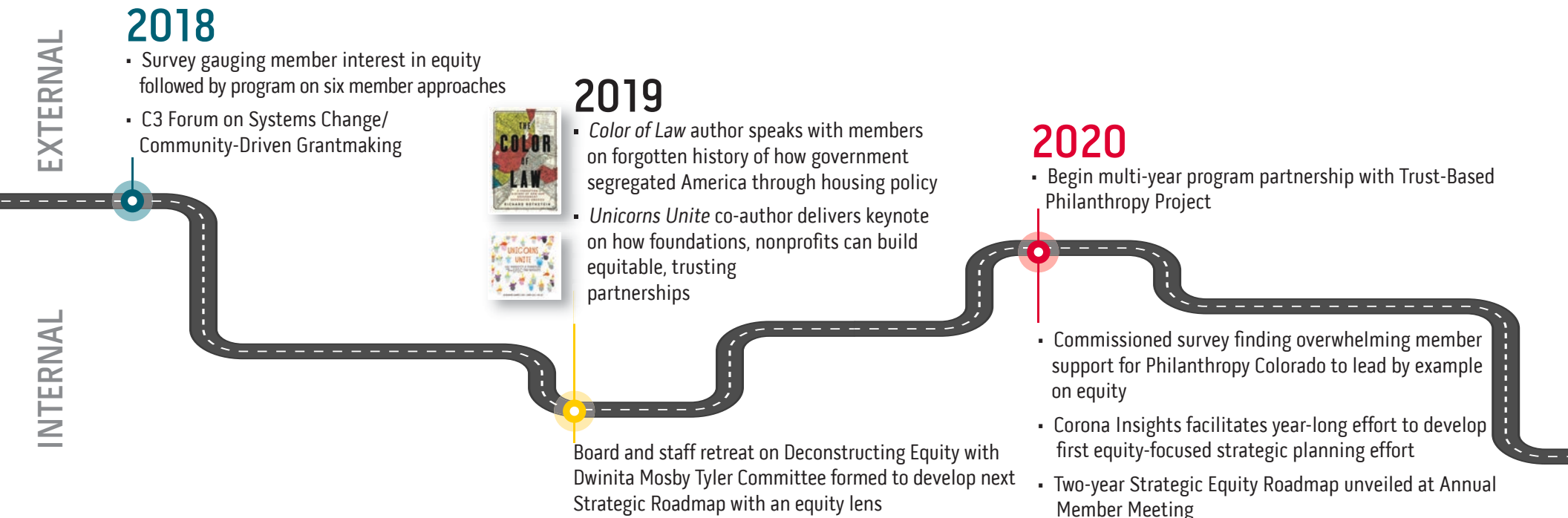
Receive national funding to launch two-year openness cohort with board members/nonprofit leaders to examine transparency, power dynamics

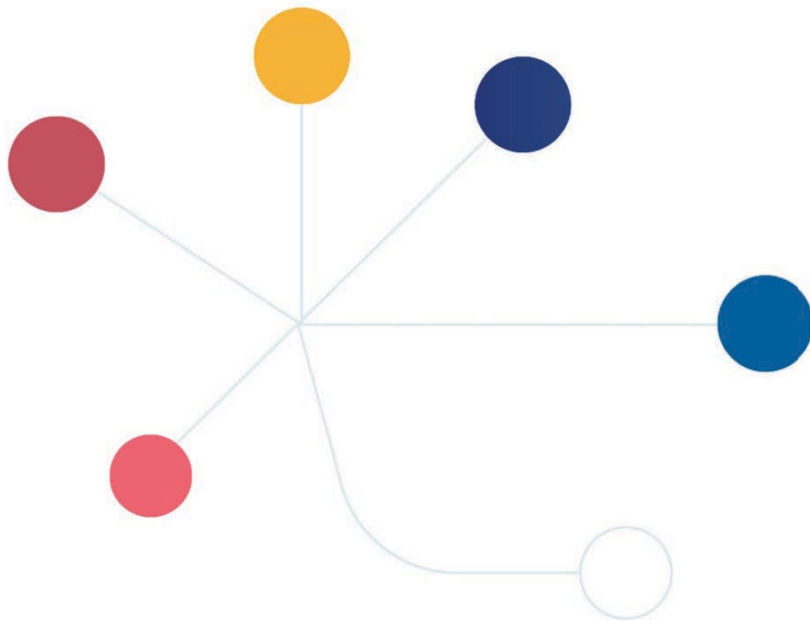
Roadmap Goal #2

CREATE FRESH MOMENTUM FOR EXPANDING ADVOCACY AND POLICY WORK

For many years, Philanthropy Colorado has played an active leadership role in advocating for policies that strengthen Colorado's philanthropic and charitable sectors, while engaging our members in these efforts. The roadmap called for expanding and building on this momentum, while also articulating our commitment to championing the leadership of our members in the advocacy and policy arena. We have done this in several ways since the launch of the roadmap:

- Expanding our long-time Public Policy Committee to work with us to revamp our board-approved policy priorities each year and actively provide guidance on our approach to providing programs, advocacy activities and resources
- Building on existing relationships with local, state, and federal policymakers, including the Governor and Colorado's congressional delegation, with the aim of increasing awareness about philanthropy, its economic impact, as well as advocating on the potential positive or negative impact of various legislative and regulatory proposals
- Creating a new Director of Advocacy and Engagement position to focus on expanding the capacity of philanthropic institutions to engage in advocacy and policy as a necessary complement to their community grantmaking
- Offering a continuing periodic series of educational programs and briefings on everything from the legal parameters around advocacy and lobbying to current ballot issues to taking public stances to funding nonprofits that engage in policy work. Our popular "Next-Day Look at the Elections" program now happens every two years, supported by the Joseph Ignat Memorial Endowment established by the Nord Family Foundation.
- Facilitating regular meetings of a peer network for members interested or actively investing in policy change on a wide number of issues
- Foundation leaders continue to meet with Colorado's congressional delegation in Washington, either virtually or in person.
- Philanthropy Colorado regularly brings members together with Governor Jared Polis and his administration, with a sharp uptick during the pandemic and the outbreak of historically large wildfires in recent years. In this photo, the Leadership Forum for CEOs gathered at the Governor's Mansion after a long break from in-person convenings.





PANDEMIC PIVOT

Philanthropy Colorado worked to connect funders across the state to ensure the sector had information about nonprofit needs, relief funds and resources. We held frequent calls and webinars designed to bring our members together to share their approaches to responding to the COVID-19 pandemic and to learn about how philanthropy could respond to this and other crises.

Philanthropy Colorado also stood with Governor Jared Polis in the formation of a statewide Colorado COVID Relief Fund. (Governor Polis, Coloradans Launch COVID Relief Fund). Read the Governor's news announcement quoting Philanthropy Colorado and its members Colorado Health Foundation and Mile High United Way. Philanthropy Colorado's CEO, served on the Executive Committee, Leadership Committee and Process Committee for the Statewide Relief Fund that raised almost \$24 million from foundations, businesses and individuals. The relief fund effort brought together community, business and foundation leaders to review and allocate funding to organizations across the state working on prevention, impact and recovery from the pandemic.

Our national network United Philanthropy Forum released a report The COVID-19 Crucible, which summarizes how Philanthropy Colorado and our partner networks have played a critical leadership role.

[Click here](#) to read the Report Highlights.



REFRESHING THE ROADMAP IN 2023 2024-2026 Priorities

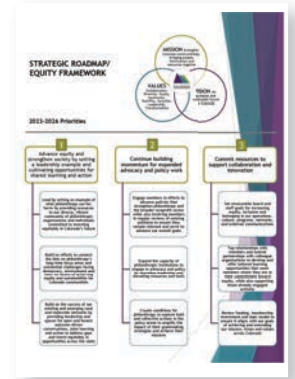
Advance equity and strengthen society by setting a leadership example and cultivating opportunities for shared learning and action

- Lead by setting an example of what philanthropy can be; Serve by providing resources to our diverse, vibrant community of philanthropic organizations and individuals committed to investing equitably in Colorado's future
- Build on efforts to connect the dots on philanthropy's long-time focus areas and existential challenges facing democracy, environment and more as means of achieving equity and sustainability for Colorado communities
- Build on the success of our existing and emerging rural and statewide networks by providing leadership and spaces for open and honest outcome-driven conversations, joint learning and action to address gaps and invest equitably in opportunities across the state

Continue building momentum for expanded advocacy and policy work

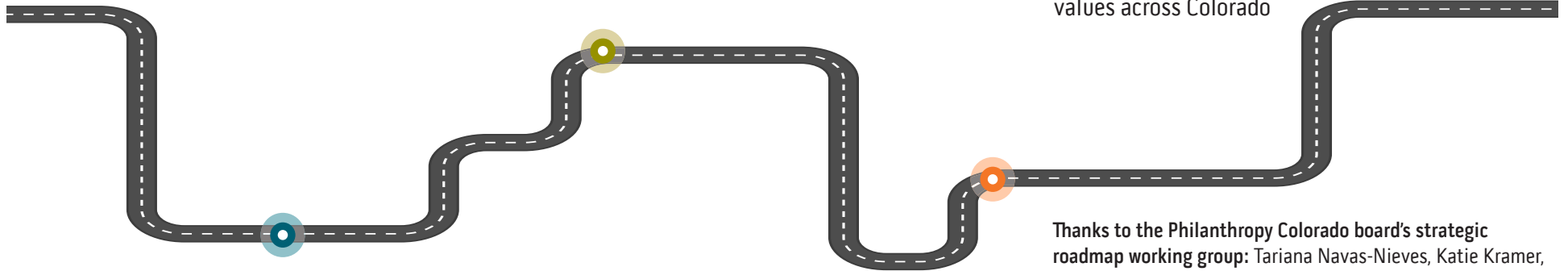
- Engage members in efforts to advance policies that strengthen philanthropy and the broader nonprofit sector while also involving members in regular reviews of existing positions to ensure they remain relevant and serve to advance our overall goals
- Expand the capacity of philanthropic institutions to engage in advocacy and policy by providing leadership and elevating resources and tools
- Create conditions for philanthropy to explore bold and collective actions in the policy arena to amplify the impact of their grantmaking strategies and achieve their missions

[Click here](#) to view the full framework for the original 2020 strategic equity roadmap.



Commit resources to support collaboration and innovation

- Set measurable board and staff goals for increasing belonging in our operations, culture, programs, networks, and external communications
- Tap relationships with members and extend partnerships with colleague organizations to develop and offer tailored learning opportunities that meet members where they are in their commitment toward equity, while also supporting those already engaged actively
- Review funding, membership investment and dues model to ensure it aligns with our goals of achieving and extending our mission, vision and values across Colorado



Thanks to the Philanthropy Colorado board's strategic roadmap working group: Tariana Navas-Nieves, Katie Kramer, Megan Ledin, Renee Ferrufino, Morris Price

PHILANTHROPY AT THE CROSSROADS

NAMING CHALLENGES, EXPLORING SOLUTIONS

Many of the most pressing issues of our time also rank among the most polarizing: gun violence, climate, racial inequity, and even the future of our democracy.

These interconnected crises have become more and more intertwined with philanthropy's long-time interest areas such as early childhood, health, education and the arts.

We launched a planned series of convenings to explore these concepts and to help connect the dots between the existential issues of our day and the many ongoing priority areas of our members and donors.

August 8, 2023

This all-day convening included:

- Short documentary clips and filmmaker talks featuring Youth Documentary Academy from Colorado Springs;
- An engaging talk and activity about bridging political divides led by the founder of Unify America;
- A conversation on what Supreme Court decisions might mean for our sector's work (from the standpoint of Colorado legal experts and foundations);
- Exploring philanthropy's role in preventing firearm death and injury (and what's happening here and elsewhere) with Colorado Office of Gun

Violence Prevention, Colorado Health Foundation, Missouri Foundation for Health and Rose Community Foundation;

- Perspectives and connecting the dots on climate change, clean energy, rural prosperity, early childhood, equity and more with Rural Climate Partnership, Capita, and Climate and Clean Energy Equity Fund

December 5, 2023

Our second "Philanthropy at the Crossroads" event examined philanthropy's role in shoring up democracy and civic engagement. Philanthropy Colorado's CEO moderated the discussion with:

- Philanthropy for Active Civic Engagement's Executive Director
- The founder of Unite America and author of *The Primary Solution: Rescuing our Democracy from the Fringes*
- President and CEO of the The Denver Foundation and founding member of the recently expanded Community Foundation Climate Collaborative

Our Rural Funders Learning Network

has been bringing together members for more than five years, with members providing financial support for a full-time director with the overall goal of sharing strategies and increasing understanding of the landscape and critical needs of these diverse communities outside the Front Range.

By establishing common priorities and looking for innovative approaches, the network seeks to address systemic rural issues such as lack of affordable housing, limited access to healthcare and childcare, and a lack of community cohesion. Multi-day visits to the San Luis Valley and Northeast Colorado have provided a close-up look at the people, the issues, and the potential solutions. We intentionally ensure our broader programs include a focus on rural Colorado. And programs focusing on rural aim to include the broader Philanthropy Colorado membership. Some recent highlights included: How Colorado's population is changing and what it means for communities; Bridging the Rural-Urban Divide; Centering Belonging in Rural Equity; Just Transitions for Colorado's Coal Communities; Building New Affordable Homes in Rural Colorado and more.

We also provided support and reporting on the **Rural Community Response & Recovery Project** with ZOMA Foundation, Telluride Foundation and The Denver Foundation, which collaboratively developed this project to provide unrestricted financial support for solutions that could most effectively support highly affected community members. We also led a broadband and digital inclusion project. During the prolonged pandemic shutdown, foundations also delivered flexible funding to meet student and family needs related to remote learning.

Thanks to those who have provided generous grant support, leadership and service on the Rural Funders Learning Network Advisory Committee between 2020-2023

Tony Lewis , Co-Lead | Donnell-Kay Foundation
Paul Major, Co-Lead | formerly with Telluride Foundation
Amy Latham, Co-Lead | The Colorado Health Foundation
Katie Kramer, Co-Lead | Boettcher Foundation
Curtis Esquibel, Co-Lead | Boettcher Foundation
Eric Bergman | Division of Local Government |
Colorado Department of Local Affairs
Ned Calonge | formerly with The Colorado Trust
D.J. Close | Delta Dental of Colorado Foundation
Jason Corzine | Telluride Foundation
Joanne Kelley | Philanthropy Colorado
Maureen Lawrence | El Pomar Foundation
Megan Ledin | Grand Foundation
Miguel In Suk Lovato | Donnell-Kay Foundation
Blake McKinlay | ZOMA Foundation
Laia Mitchell | Gates Family Foundation
Doug Palmer | The Beacon Fund
Jana Persky | formerly with ZOMA Foundation
Morris Price | The Colorado Trust
Michaelle Smith | Rocky Mountain Health Foundation
Erica Snow | Aspen Community Foundation
Tamara Tormohlen | formerly with Aspen Community
Foundation
Chantal Unfug | Division of Local Government |
Colorado Department of Local Affairs

Thank you to these volunteer leaders serving during 2020-2023

PHILANTHROPY COLORADO EQUITY COMMITTEE

Equity Committee members:

Lindy Eichenbaum Lent, Co-Chair | Rose Community Foundation
Ellen Sandberg, Co-Chair | PNC Bank
Rebecca Arno | Barton Institute for Community Action
Chris Bui | The Colorado Health Foundation
Azarel Madrigal-Chase | First Southwest Community Fund
Sara Craig-Scheckman | Craig-Scheckman Family Foundation
Renee Ferrufino | Women's Foundation of Colorado
Morris Price | The Colorado Trust
Joy Sullivan | United Way of Larimer County

PHILANTHROPY COLORADO PUBLIC POLICY COMMITTEE

Megan Ledin, Co-Chair | Grand Foundation
Gary Steuer | Bonfils-Stanton Foundation
Robin Wood-Mason | Community Shares of Colorado
Joanne Kelley | Philanthropy Colorado
Nazia Hasan | Colorado Gives Foundation
Sarah Kurz | Rose Community Foundation
Janet Lopez | The Denver Foundation
Melissa Milios Davis | Gates Family Foundation
Louise Myrland | The Women's Foundation of Colorado
Roweena Naidoo | Mile High United Way
Tim Wohlgenant | Community Foundation

THANK YOU TO OUR MEMBERS PROVIDING GENEROUS LEADERSHIP SUPPORT

The Colorado Health Foundation
The Colorado Trust
Bohemian Foundation
Craig-Scheckman Family Foundation
ZOMA Foundation
Boettcher Foundation
Rose Community Foundation
The Denver Foundation
Donnell-Kay Foundation
Gates Family Foundation
Anschutz Family Foundation
Aspen Community Foundation
Barton Institute for Community Action
Colorado Gives Foundation
Delta Dental of Colorado Foundation

El Pomar Foundation
Rocky Mountain Health Foundation
The Anschutz Foundation
Bonfils-Stanton Foundation
Mile High United Way
NextFifty Initiative
Vera and Joseph Dresner Foundation
Denver Arts & Venues
Colorado Department of Local Affairs
AV Hunter Trust
Joseph Henry Edmondson Foundation
Larrk Foundation

Thank you to United Philanthropy Forum for its grant support around our rural equity initiatives



Staff

Philanthropy Colorado Team (2020-2023)

Joanne Kelley | CEO
Amy Swiatek | Senior Director, Rural and Statewide Networks
Eliane Walters | Program and Systems Manager
Sophie Stewart-Lopes | Manager of Operations and Culture
Jan Brennan | Director of Advocacy and Engagement
Sylvia Kamau-Small | Director of Equity and Impact (through end of 2022)
Anna Metropulos | Program Associate (through late 2020)

Contact us: info@PhilanthropyColorado.org | Visit: PhilanthropyColorado.org



PHILANTHROPY
COLORADO

Stronger connections.
Stronger communities.

Mission | Strengthen Colorado communities by bringing people, information, and resources together

Vision | An equitable and sustainable future for Colorado

Values | Collaboration, Diversity, Equity, Generosity, Humility, Inclusion, Leadership, Transformation