



COLORADO
ASSOCIATION OF
FUNDERS
Annual Report 2015



Dear Colleagues:

We wrapped up an exceptional year in 2015, with a variety of in-depth programming and new ways of connecting funders on issues of interest to the field. We continue to expand peer-to-peer connections to bring more value to members looking to engage more deeply.

Our work to strengthen Colorado's philanthropic community is complemented by our efforts to advocate for and increase visibility for the sector. This work can only happen with the commitment and active engagement of our members. Collaborations with partners also continue to play a critical role in our success.

This brief report provides some highlights of our work in the past year toward the goals outlined in our strategic roadmap.

We are grateful for your ongoing support and involvement and look forward to serving you in the year ahead.

With appreciation,

Joanne Kelley
Executive Director

P.S. For more information about the Colorado Association of Funders, please visit coloradofunders.org



[Top] Board Chair Marla Williams, President and CEO of Community First Foundation, addresses members at annual meeting in November. [Bottom] Executive Director Joanne Kelley with Gov. John Hickenlooper at annual convening at Carriage House at the Governor's Mansion.

[Cover photos] from left to right: Ted Harms, The Anschutz Foundation, and Chris Wiant, Caring for Colorado Foundation, were among the nearly 100 members attending our annual convening with Gov. John Hickenlooper at the Carriage House at the Governor's Mansion; CAF hosted a reception at The Colorado Trust to welcome new Colorado Health Foundation Karen McNeil-Miller to the state; Gary Steuer, President and CEO of Bonfils-Stanton Foundation, serves as co-chair of CAF's Leadership Forum for chief executives and giving directors and was elected to the Board at the 2015 Annual Meeting at History Colorado Center.

In reaffirming our strategic roadmap we continue to focus on three key goals:

Goal #1: Strengthen the Field Thanks to deep connections and involvement in our national network and the statewide association community, we have been able to source top speakers and develop exceptional programming this year and next. In particular, we have worked to broaden peer-to-peer connections among members to increase the value of the network. Here are a few of the highlights:

- Our Leadership Forum, co-chaired by Gary Steuer and Sue Renner, continues to bring together CEOs together for highly engaging sessions to discuss top of mind issues and share experiences. And our cohort of community foundation member CEOs connects four times by phone to hear and share updates, challenges and concerns.
- Following a successful program early in the year, we identified the demand for a new member-led affinity group on Impact investing chaired by Luis Duarte of Gary Community Investments/Piton Foundation and Jesse Wolff at Colorado Health Foundation; and also launched one for HR/Operations staff led by Marie Hannon at Colorado Health Foundation and Marcy Hladik at Rose Community Foundation.
- Our first funder exchange expertly facilitated by Adrienne Mansanares (Denver Foundation) drew 30 of our members to spend an afternoon discussing changes to their strategies, focus areas and grantmaking. This highly rated program was a first for us and one of three Leveraging the Network sessions demonstrating the power of peer connections.
- Partnering with Colorado Funders for Inclusiveness and Equity, we co-hosted a program on increasing rates of gentrification in Colorado's urban areas and its impact on philanthropic goals.
- We brought in Hewlett Foundation's Fay Twersky to talk about her national research and designed the program to include an engaging panel of CEOs including Lauren Casteel (Women's Foundation of Colorado), Gary Steuer (Bonfils-Stanton Foundation), Patrick Gaston (Western Union Foundation), Sheila Bugdanowitz (Rose Community Foundation).
- More than 100 funders and nonprofits came together for our annual partners' luncheon and a fascinating program featuring highly sought-after national speaker John Kobara who delivered a compelling keynote on finding more meaning in your work.



Sue Renner, Executive Director, David and Laura Merage Foundation, completed her board service in 2015 and continues to serve Forum. Shown here interacting with Philanthropy thought leader Mark Sedway at our program, "Be a Champion for Your Cause."

Goal #2: Promote a Strong Sector CAF continued to expand its role in advocating for and increasing visibility for the sector, as well as building connections with stakeholders. Some of the key activities this year include:

- We worked closely with our public policy task force to move CAF forward in taking a position in support of its first state bill. Co-Chairs Megan Ledin of Grand Foundation and Joe Ignat of Nord Family Foundation led this effort, which resulted in the board's vote to support a bill that would create a tax credit for donations to nonprofit endowments. CAF worked with the Colorado Nonprofit Association to meet with lawmakers over the summer and fall in an effort to advance the legislation in 2016.
- We continue to collaborate with the Colorado Nonprofit Association regularly by serving on its policy committee, and also serving with fellow nonprofits on the Colorado Secretary of State's action team on nonprofit fundraising and finances.
- Our C3 Forum partnership with Community Resource Center and CNA, supported by our members such as Community Foundation of Northern Colorado and Bohemian Foundation -- drew hundreds of funders and nonprofits for shared learning and dialogue in Loveland.
- Increasing visibility for CAF and the sector included speaking at two Rural Philanthropy Days conferences, national policy conferences and state conferences, participating on the National Philanthropy Day Colorado and Colorado Collaboration Award Steering Committees and serving on various award selection committees (Excellence in Nonprofit Media, Bank of the West Philanthropy Innovation Awards and Colorado Collaboration Award)
- We've also developed key contacts in the media, both locally and nationally with quotes in a story appearing in The Chronicle of Philanthropy and another article quoting our giving data carried in most major newspapers here and around the country including the New York Times and Washington Post.
- We continue to build our relationships in Washington, with several members from around the state once again joining the CAF delegation for substantive meetings with Senators Bennet and Gardner and Representatives in the House.
- CAF's Executive Director was elected to serve a second term on the board of the national Forum Board of directors, the Forum government relations committee, and serves on the planning committee for the inaugural Joint Policy Works Institute with RAs and nonprofit associations in 2016.
- Thanks to the work of the Forum to build bridges with government stakeholders, CAF's Executive Director and Board Chair Marla Williams participated in a September White House briefing on immigration policy for leaders of regional associations across the country.



Delegates traveling to Washington, DC, for Foundations on the Hill in March, from left to right: Megan Ledin, Grand Foundation; Heather Carroll, Joseph Henry Edmondson Foundation; Rebecca Arno, The Denver Foundation; Kyle Hybl, El Pomar Foundation; Tim Schultz, Boettcher Foundation. Megan Ledin serves as co-chair of CAF's public policy committee, along with Joe Ignat of Nord Family Foundation. The committee, which reflects the diversity of CAF member organizations, reviews legislative policy proposals and drafts public positions for CAF board consideration.

- Earlier this year almost 100 members, cabinet and public officials came together for a program we organized at the Governor’s Mansion to hear from the Governor about his priorities for a second term.
- Under the leadership of Rose CEO Sheila Bugdanowitz, who heads CAF’s Disaster Philanthropy Task Force, our first pooled foundation fund invested in the state’s efforts to create a resilience framework in the aftermath of historic flooding in 2013.
- We partnered with the Impact Finance Center as one of many organizations involved in planning the first Colorado Impact Days and Initiative, the first of its kind event intended to catalyze impact investing in Colorado and provide a model that can be replicated in other parts of the country.

Goal #3: Maintaining a Healthy Organization (CAF) All of our work has led to increased engagement and support. Some of the key activities this year include:

- Completion of a board-led strategic “refresh” of CAF’s strategic roadmap and a reaffirmation of the current business model (thanks to leadership from our Treasurer Alyssa Kopf)
- Signing up 10 new members in 2015, including four new corporate members and one returning corporate member, as well as four community foundations and a new private foundation. The addition of community foundations based in Ft. Collins, Grand Junction, Breckenridge and Greeley means we increasingly serve the vast majority of the state.
- Exceeding our overall dues revenue forecasts, while also attracting leadership contributions from more than a dozen members including several board members (See right)
- Along with regional associations in other states, CAF’s Executive Director served on a task force exploring ways of providing additional services (legal, training, etc.) to bring additional value to community foundations.
- Improving our e-news, website and other communications tools. We’ve built an active Twitter presence, with almost 2,500 followers and interact with members and other stakeholders regularly via social media.
- We continue to expand the features and use of our Salesforce platform for managing member relationships and contact information.
- We have already planned a strong lineup of programs in 2016, including a family philanthropy symposium and trainings by nationally recognized leaders including Grantmakers for Effective Organizations
- Finally, CAF’s ability to attract a strong slate of directors and officers each year continues to be a testament to its relevance and leadership in the funder community.

Thanks to the following members who provided leadership gifts and additional contributions in 2015:

A.V. Hunter Trust, Inc.
 Bonfils-Stanton Foundation
 Brett Family Foundation
 Community First Foundation
 Daniels Fund
 Greenlee Family Foundation
 The Anschutz Foundation
 The Colorado Trust
 The David and Lucile Packard Foundation
 The Denver Foundation
 The LARRK Foundation
 Western Union

Thank you again to Rose Community Foundation for donating our office space.

CAF Board of Directors 2015

Chair: Marla Williams | President and CEO, Community First Foundation

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

Secretary: Gay Cook | Vice President of Strategy & Philanthropic Relations, The Colorado Trust (January-May)

Secretary: Ned Calonge | President and CEO, The Colorado Trust (June-December)

Treasurer: Kelly Dunkin | Vice President of Philanthropy, Colorado Health Foundation (January-May)

Treasurer: Alyssa Kopf | CEO, Community Shares of Colorado (June-December)

Directors:

Gary Butterworth | Senior Vice President, El Pomar Foundation

Rob Greenlee | Executive Director, Greenlee Family Foundation

Joe Ignat | Representative, Nord Family Foundation

Amy Latham | Vice President of Philanthropy, The Colorado Health Foundation (June-December)

Sue Renner | Executive Director, David & Laura Merage Foundation

Ruth Rohs | Executive Director, IMA Foundation

Ellen Sandberg | Executive Director, CH2M Hill Foundation

Tamara Tormohlen | Executive Director, Aspen Community Foundation

Lynne Valencia | Vice President of Community Relations, 9News/TEGNA Foundation

Chris Wiant | President and CEO, Caring for Colorado Foundation

THANK YOU
TO OUR MANY
VOLUNTEERS
& SUPPORTERS
WHO MAKE
OUR WORK
POSSIBLE



Hillary Fulton, senior program officer at The Colorado Health Foundation, serves on the Leadership Team for the Early Childhood Funders Group, which meets monthly as a learning exchange network for funders supporting early childhood education. CAF will begin providing communications and logistical support to the network beginning in late 2016.

Program Planning Task Force 2015

Abel Wurmnest | Anschutz Family Foundation
Sarah Indyk | Rose Community Foundation,
Chad Robertson | David and Laura Merage Foundation
Lynne Valencia | TEGNA Foundation/9News
Julie Shaffer | Oreg Foundation
Claire Gilbert | Brett Family Foundation

2015 CAF Human Resources and Operations Group Co-Chairs

Maria Hannon, The Colorado Health Foundation
Marci Hladik, Rose Community Foundation

2015 CAF Leadership Forum Co-Chairs

Gary Steuer, Bonfils-Stanton Foundation
Sue Renner, David and Laura Merage Foundation

2015 CAF Executive Admin Group Chair

Monique Loseke, Bonfils-Stanton Foundation

2015 CAF Impact Investing Forum Co-Chairs

Luis Duarte, Gary Community Investments/Piton Foundation
Jesse Wolff, The Colorado Health Foundation



[Top]Carmelita Galicia-Munoz, Donnell-Kay Foundation takes part in one of the many programs aimed at connecting funders throughout the year. [Bottom] Nationally recognized speaker John Kobara delivers highly rated keynote to funders and nonprofits at annual partners luncheon, one of CAF's most popular networking and joint learning opportunities.

Foundations on the Hill 2015

Rebecca Arno | The Denver Foundation
Heather Carroll | Joseph Henry Edmondson Foundation
Megan Ledin | Grand Foundation
Tim Schultz | Boettcher Foundation
Joseph Ignat | Nord Family Foundation
Kyle Hybl | El Pomar Foundation

C3 Forum 2015

Janice Fritsch | Kenneth King Foundaiton
Sheri Hannah-Ruh | United Way of Weld County
Cheryl Zimlich | Bohemian Foundaiton
Logan Boon | Bohemian Foundaiton
Lydia Johnson | Women's Foundation of Colorado
Jason Callegari | Buell Foundation
Matt Carpenter | El Pomar Foundation
Kim Lehman | Bohemian Foundaiton
Tony Lewis | Donnell-Kay Foundaiton
Monica Lyle | The Colorado Health Foundation
Maureen McDonald | Kaiser Permanenete
Sara Overby | The Colorado Health Foundation
Lisa Rucker | Gates Family Foundation
Carrie Tynan | Adolph Coors Foundation
Roxanne Fry | Community Foundation of Northern Colorado
Annette Geiselman | Community Foundation of Northern Colorado
Allison Hines | United Way of Larimer County
Eric Jones | Bohemian Foundation
Meghan King | United Way of Larimer County
Rand E. Morgan | Community Foundation Serving Greely and Weld County
Lyle SmithGraybeal | United Way of Weld County

Jeannine Truswell | United Way of Weld County
Lauren Weber | Community Foundation Serving Greely and Weld County
Lisa Ray Borgmann | Community Shares of Colorado
Colleen Church | Caring for Colorado Foundation
Melanie Falvo | United Way of Weld County
Julie Lerudis | Boettcher Foundation
Stefan | Community Foundaiton of Serving Boulder County
Tim Schultz | Boettcher Foundation
Annie Taylor | Caring for Colorado Foundation
TeRay Esquibel | El Pomar Foundation

Public Policy Committee 2015

Megan Ledin | Grand Foundation
Joseph Ignat | Nord Family Foundation
Rob Greenlee | Greenlee Family Foundation
Sue Renner | David and Laura Merage Foundation
Susan Steele | Buell Foundation
Tamara Tormohlen | Aspen Community Foundation



Ann Hovland, Chief Financial Officer/Treasurer at Bonfils-Stanton Foundation, connects with Anne Garcia, Chief Financial and Operating Officer at Rose Community Foundation at CAF networking and learning program.