

## Yampa Valley Community Foundation 2013 Annual Report



Whatever your passion, we know a worthy cause.

**JUST GIVE**

*Thank You!*

Yampa Valley Community Foundation recently celebrated a milestone, and our success is entirely a result of your philanthropic power. It is because of you that we have been able to work with thousands of donors to facilitate over \$10,000,000 in charitable gifts to many local nonprofits and community initiatives. Your support and belief in us continues to drive everything we do; we exist to connect people who care with causes that matter.

As we enter an exciting and new era, we look forward to continuing to build a healthy and vital community with your help. Whether it is to learn more about a local cause dear to your heart, participate in collaborative charitable giving, help build assets for the future of our valley, or leave a legacy beyond your lifetime, we provide the services to meet all of your philanthropic desires.

We also extend our deepest appreciation to the Steamboat Ski & Resort Corporation for their continued support of YVCF through the Passport Club. Proceeds from this program generously make grants to the community and support the operations of our organization. Many thanks go out to Chris Diamond and his team.

The Yampa Valley is full of generous and deeply caring people, like you, who are committed to the well-being of our community. And we thank you!

Best wishes,

*Adonna Allen  
Board Chair*



## Experts in Philanthropy

*At Yampa Valley Community Foundation (YVCF), we are experts on local philanthropy and can assist you in making strategic decisions about how to make the most positive impact with your dollars. We partner with individuals, organizations and businesses to promote thoughtful, specialized charitable giving.*

Our Board of Trustees is comprised of community leaders who can identify emerging challenges in the valley and energize local philanthropists to help build a healthy and vital community.

YVCF's staff understands the needs of the Yampa Valley. The staff works closely with local nonprofits to improve community life and recommend where donors can make gifts that have the most impact. Whatever your passion, we know a worthy cause.

One of our core strengths is professional investment management of the funds donors entrust to us. Investments are managed by Colorado State Bank and Trust, in conjunction with oversight from our investment committee.

Yampa Valley Community Foundation has been confirmed in compliance with The National Standards for Community Foundations. The program requires community foundations to document their policies for donor services, investments, grant making and administration. National Standards has established legal, ethical, effective practices that increase donors' comfort level when starting a fund at a Community Foundation.

*The Community  
Foundation is here  
to help you with  
your current and  
future giving.  
Let us know how  
we can help.*



## Passport Club

Each winter for the past 18 years, the Steamboat Ski & Resort Corporation (SSRC) has generously donated 80 ski medallions to the Community Foundation's Passport Club. Membership includes either one transferable Medallion



or two season ski passes to the Steamboat Ski Area, members-only locker room in Gondola

Square, convenient parking, four days of skiing each at Winter Park and Copper Mountain, discounted Friends and Family passes, First Tracks vouchers, summer gondola use and invitations to Community Foundation events. Funds generated from the Passport Club help provide for the operations of the Community Foundation as well as support SSRC's contributions to the Community Grant Cycle. We encourage our members to actively follow and participate with the nonprofits that their membership supports, so they can really see the impact they make through membership. A Passport Club Membership is a great way to support the community and enjoy the benefits that the Steamboat Ski Area provides.

Elyse and Kyle Craig have been Passport Club members since the start of the program:

*"If you ever want to give and receive, join one of the opportunities to participate with the non-profits. I had the privilege to help at the STARS program this summer, waterskiing at Eagle Lake. The smiles and hugs were abundant as the teenagers experienced the thrill of getting up and riding the wake. It is one thing to give funds*

*to these wonderful organizations, but even more gratifying to see how the allocations are being used. It was an experience of a lifetime and one I'll never forget."*

- Elyse Craig



Photo:

*Elyse Craig and a volunteer assist STARS program participant Eric Baker at Eagle Lake.*



**\$125,200** was given in 2013 to local recipients by Steamboat Ski & Resort Corporation via the Passport Club at YVCF

## Here's how Passport Club works:



Call **970.879.8632** to join now. Only a few memberships are still available this season!



You too can become involved and support your community. Everyone can! Choose your passion and contact us:

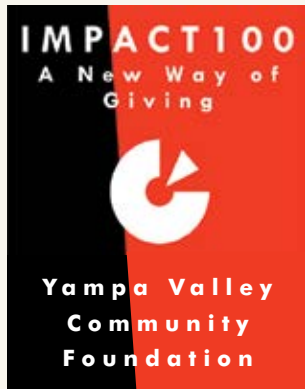
970.879.8632

[yvcf.org](http://yvcf.org)



## Giving Circles

*A Giving Circle is a group of people who come together, pool tax-deductible charitable donations and make collective recommendations about where to grant their money. Giving Circles offer members a chance to learn more about giving and community issues in an active, team approach to philanthropy. Yampa Valley Community Foundation provides all administrative and financial services to Giving Circles. Call us to find out more about joining or forming a giving circle.*



### **IMPACT 100**

Over the past seven years IMPACT100 has raised over \$78,000 supporting 27 different local nonprofit organizations. IMPACT100 started when members of the Board of Trustees of Yampa Valley Community Foundation sought to attract a young, dynamic section of the community to charitable giving. The concept is simple: 100 people donate \$100 and collectively make an impact with a grant of \$10,000. Since 2006, members attend four social events each year, held at members' homes or local venues. At each year's fall kickoff, members select four local nonprofits to learn more about in the coming year. At the next two events, representatives of the nonprofits give a short presentation on their programs. At the final spring event, IMPACT100 members vote, and the money is granted to the selected organizations where the funds will make the greatest impact.

*If you are interested in becoming involved, or would like more information on our programs please give us a call at 970.879.8632 or email [info@yvcf.org](mailto:info@yvcf.org).*

## Scholarship Grants

The need for scholarships is greater than the available resources. As tuition continues to rise, support of scholarships becomes even more vital. Yampa Valley Community Foundation has 21 active scholarship funds to help our local youth finance their education. In 2013, Yampa Valley Community Foundation gave \$121,450 to 76 local students.

Yampa Valley Community Foundation believes that higher education is the key to future success for individuals and our community and honors the area's youth for their academic and athletic success and community involvement. We assist dozens of students each year as they strive to attain their educational goals. Thank you to the donors who make these awards possible. Together we can continue to provide opportunities and share in students' success. If you are interested in starting a Scholarship Fund contact the Community Foundation at 970.879.8632.

### Robert Welborn Scholarship Fund

Upon his passing in September 2013, Routt County resident Robert Welborn bequeathed his Steamboat residence and an automobile to Yampa Valley Community Foundation. At his request, the Community Foundation will liquidate the assets to establish the Robert Welborn Scholarship Fund, an endowment fund that will provide scholarships to Routt and Moffat County students attending a trade/vocational school or pursuing a career in engineering or the sciences. Through this unique gift and his partnership with YVCF, Mr. Welborn has created an opportunity for success for many local youth that will last in perpetuity. Mr. Welborn was originally from Arkansas and studied chemical engineering at the University of Arkansas. He relocated to Steamboat in 1999 and enjoyed the ski area as well as the agricultural and mining tradition of the region. He wanted to "help people get an education to help them find a good job."



Don Lufkin  
Leaves a  
Charitable  
Legacy



Longtime Routt County rancher Don Lufkin originally came to Routt County by stagecoach and settled in the Yampa Valley south of Steamboat in 1902. Mr. Lufkin never forgot the hardships his family experienced in the first 30 years of his life. He was always willing to share his good fortune with others. He said, "This community has been so good to me, I just want to give something back." Mr. Lufkin was named the individual Philanthropist of the Year by Yampa Valley Community Foundation in 2000. "From now on, I'm going to give Yampa Valley Community Foundation one check," he said in 2000. "I've been writing individual ones up till now, and I'm always afraid I'm going to forget someone." His favorite causes were those benefiting youth, seniors and promoting the health of residents of the Yampa Valley, all of which he funded through the Lufkin Family Endowment Fund at Yampa Valley Community Foundation. The Lufkin Family Endowment made grants to over fifteen organizations during his lifetime, and through a substantial contribution from his estate, those organizations will continue to receive donations for the next twenty years. This gift will ensure his generosity did not cease upon his passing and will also carry his philanthropic legacy long into the future. In addition to other causes, he donated money to help build the Lufkin LIFT-UP Center, the Lufkin Library at the Tread of Pioneers Museum and the Lufkin Atrium in a wing of the Yampa Valley Medical Center. YVCF also holds the Lufkin Lift Up Endowment Fund which supports the Lift Up organization.

Mr. Lufkin also served on the Board of the Routt Memorial Hospital for more than 15 years, served on the Board of the Routt County Foundation for Senior Citizens, and served on the Board for the Mesa Schoolhouse as well as the committee to acquire and refurbish the school. He also was a longtime member of Rotary, the Routt County Cattlemen's Association, Colorado Cattlemen Association, American Legion, Veterans of Foreign Wars and United Methodist Church of Steamboat Springs.



## Nonprofit Support

*Currently over 200 nonprofits serve our valley enhancing our cultural opportunities, providing vital services and serving as stewards for our environment. The Community Foundation supports local nonprofits in several ways. To learn how YVCF can assist your organization, visit our website at [yvcf.org](http://yvcf.org).*

### **Grants:**

The Community Foundation offers the Community Grant cycle for local nonprofits to request funds. Grant proposals are reviewed by our Grants Committee comprised of Board Members and community volunteers. Grants are awarded for innovative projects and programs which demonstrate progress toward achieving community goals.

### **Funding Information Network:**

The Community Foundation houses the Funding Information Network – a lending and resource library and a powerful grant database. Use of this resource assists nonprofits to obtain information and resources on additional funding from a wide variety of sources.

### **Endowments:**

Nonprofits can establish an endowment fund that can help provide financial resources for the future of their organization. Endowment funds are professionally managed and pooled for long-term investment.

### **Workshops and Seminars:**

YVCF hosts workshops and seminars on various subjects throughout the year to increase nonprofit management knowledge and success.



Grant  
Dollars  
In Action

**Below are some of the many fully funded programs  
from the 2013 Community Grant Cycle:**

**Connections 4 Kids Imagination Library**

In collaboration with Moffat County United Way, this program delivers a free book per month to participants, ages birth – 8, to promote an early love of reading that translates to improved literacy and school success, and promotes a family culture of reading that often does not exist otherwise. Thirty-eight percent of children in Moffat County are insufficient in literacy tests. Currently there are 229 students enrolled.



**South Routt School District Hands-In program**

This program provides licensed therapists to assist with identified at-risk youth as well as a school social worker for other students experiencing short-term crisis. The therapist provides in-school individual therapy sessions, support to teachers and students on behavior management and classroom strategies, family therapy in the evening, and crisis management. Hands-In kids have academic, social, and behavioral issues at school, often related to problems at home. Last year, 34 students and 29 parents were reached, about double from the prior year.

**Russian Art Exhibit**

Steamboat Art Museum's mission is to collect and preserve fine art and present it to the public with a focus on the culture and heritage of Northwest Colorado. They also provide workshops and educational opportunities to residents and visitors. A grant awarded helped fund the exhibit: "Russian Art – A Private Collection" from November 2013 – April 2014.



Connecting people who care with causes that matter.



**150+**  
charitable funds



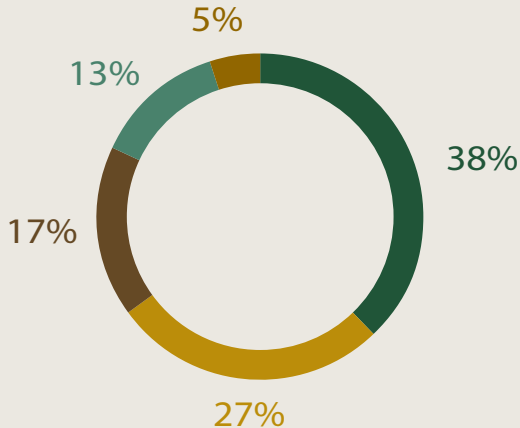
**\$10+ Million**  
gifted to the local community to date



**\$158,400 granted**  
in the 2013 Community Grant Cycle



We serve both Moffat  
and Routt counties



-  Health & Human Services
-  Education
-  Arts & Culture
-  Environmental
-  Recreation

A total of 43 grant recipients



@ For a full list of grant recipients,  
please visit us online at [yvcf.org](http://yvcf.org)

Grants made possible by Donor Advisors, the Gloria Gossard Memorial Endowment,  
The Arthur Anderson Memorial Endowment and Steamboat Ski & Resort Corporation.

*Philanthropist  
of the Year  
2013*

*The Celebration of Philanthropy Award was established in 1998 to heighten visibility of giving in the Yampa Valley. The award honors an individual, business and youth who have exhibited significant charitable giving, insightful leadership and volunteerism, and who encouraged others to contribute by example. The Community Foundation presented the Philanthropist of the Year awards at the 2013 "Celebration of Philanthropy". You can view a list of previous years' award recipients on our website [yvcf.org](http://yvcf.org) under Learn.*

**Rod and Vicky Hanna**  
**Individual Philanthropists**



**Kayla Guettich**  
**Youth Philanthropist**



**Yampa Valley Bank**  
**Business Philanthropist**



## Making Giving Easy

*Yampa Valley Community Foundation understands that charitable giving is unique to each individual donor. That is why we offer a variety of ways to make a contribution. Giving options include cash, securities, life insurance, retirement accounts, real estate, charitable remainder trusts, and bequests. We will work closely with you to develop a plan that meets your needs and interests.*

### **Community Grant Funds**

Community Grant Funds allow YVCF to support the ever changing needs in our community. These endowments provide annual grant dollars in the areas of Health and Human Services, Arts and Culture, Education, Environment and Recreation.

### **YVCF Trustee Operating Endowment**

The endowment increases our long-term capacity to serve donors, nonprofits and the Yampa Valley. Our goal is to continue to build an endowment to help secure our organization's future in the valley.

### **Designated Funds**

Designated Funds are created to support one or more organizations specified by the Donor. Distribution from the Fund may provide general benefits to a particular organization or a specific program or project of the organization.

### **Donor Advised Funds**

Donor Advised Funds are useful for donors who want to take a charitable deduction one year and make distributions from income or principal in future years. Donors are able to actively participate in the giving process by recommending organizations to receive gifts. The Community Foundation assists Donor Advisors by maintaining fund records, researching potential fund recipients, connecting donors with potential fund recipients and ensuring that distributions are made to qualified tax-exempt organizations.

### **Nonprofit Endowments**

Nonprofit organizations may place their endowed funds at the Community Foundation, thus assuring their donors that funds earmarked for the future will be invested wisely and used appropriately. The Community Foundation manages the fund as part of its investments and can distribute annual payments to the organization.

Audit:  
2013  
Financial  
Highlights

Yampa Valley Community Foundation reached a significant milestone in 2013 by surpassing \$10M in total assets. We could not have achieved such success without our many donors and friends. Thank you for your trust and support in all that we do.

**Assets**

Cash and Cash Equivalents .....	\$534,786
Investments .....	\$9,842,583
Prepaid Expenses .....	\$4,534
Pledges .....	\$15,575
Fixed Assets less Accumulated Depreciation .....	\$15,617
Other Assets .....	\$14,358
<b>Total Assets .....</b>	<b>\$10,427,453</b>

**Liabilities and Net Assets**

Accounts Payable and Accrued Expenses .....	\$14,664
Deferred Revenue .....	\$70,000
Funds Held for Other Agencies .....	\$1,703,723
<b>Total Liabilities .....</b>	<b>\$1,788,387</b>
Temporarily Restricted Assets .....	\$565,221
Unrestricted Net Assets .....	\$8,073,845
<b>Total Net Assets .....</b>	<b>\$8,639,066</b>
<b>Total Liabilities and Net Assets .....</b>	<b>\$10,427,453</b>

**Revenue and Support**

Contributions .....	\$947,459
Passport Club Program (Net) .....	\$347,485
Increase in Value of Invested Assets .....	\$1,115,410
Interest and Dividends .....	\$198,603
Other Contributed Goods and Services .....	\$5,253
<b>Total Revenue and Support .....</b>	<b>\$2,614,210</b>
Less Agency Income .....	(\$736,596)
<b>Revenue Available for Programs &amp; Services ..</b>	<b>\$1,877,614</b>

**Programs and Services**

Grants Awarded .....	\$750,338
Agency Disbursements .....	\$239,717
Supporting Services .....	\$327,567
<b>Total Expenditures .....</b>	<b>\$1,317,622</b>
Less Agency Expenses .....	(\$525,555)
<b>Expenses for Programs and Services .....</b>	<b>\$792,067</b>
<b>Change in Net Assets .....</b>	<b>\$1,085,547</b>

# Leadership

## Board of Trustees

Adonna Allen  
*Chair*

Jim Bronner  
*Vice Chair*

Laura Cusenbary  
*Vice Chair*

Dana Tredway  
*Secretary/Treasurer*

Paula Cooper Black  
*Emeritus*

Tammie Delaney

Chris Diamond

Jay Fetcher

Rod Hanna

Ron Krall

Gary Neale

Kathryn Pedersen

Tom Sharp

Pam Vanatta



### Staff (left to right)

Mark Andersen, *Executive Director*

Heidi Walker, *Office Manager*

Erin Davis, *Grants Manager*

Tarsha Ebbert, *Communications and Donor Relations*

Ann Barbier, CPA, *Finance Director*

If you are interested in becoming involved with or would like more information about our programs please give us a call at 970.879.8632 or email [info@yvcf.org](mailto:info@yvcf.org). We look forward to hearing from you!



Confirmed in Compliance with National Standards for U.S. Community Foundations



Connecting People Who Care  
with Causes That Matter

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