

Build a legacy!

ONWARD!



**2018
ANNUAL
REPORT**

ONWARD! A LEGACY FOUNDATION

COMMUNITY FOUNDATION SERVING THE
FOUR CORNERS' COMMUNITIES

MISSION:

Provide opportunities to develop and maintain a sustainable resource base that will enhance the quality of life for residents in the Four Corners' communities.

GUIDING PRINCIPLES:

- Invest donor funds responsibly to preserve capital, provide growth, and earn income for grant making
- Create and encourage methods for philanthropic giving to meet financial goals for a variety of donors
- Identify, improve, and assist in addressing the needs of the Four Corners' communities
- Foster understanding and cooperation among diverse cultural and ethnic groups

ONWARD! A LEGACY FOUNDATION

BOARD OF DIRECTORS

Pete Montano - President
M.B. McAfee - Vice President
Suzanne Butterfield - Secretary
Youvonne Neeley - Treasurer
Robby Henes
Laura Herrick
Stephen Hanson
Errin Walker
Shere Holleman

INVESTMENT ADVISORY COMMITTEE

Joe Turner
Byron Maynes
Doug Greene
Walt Henes
Tom Helms
Andrew Cuckie
Marty McKean

ONWARD! STAFF

Chuck Forth - Executive Director
Nicci Crowley - Relations Director
Tharimae Jones - Administrative Assistant

ONWARD! PARTICIPATES IN RURAL PHILANTHROPY DAYS

In September, Onward! A Legacy Foundation took part in Southwest Rural Philanthropy Days in Cortez, Colorado. This event, which comes to the five county region of southwest Colorado happens every four years. Cortez was lucky to host over 350 non-profit professionals as they networked, attended training sessions, and engaged with funders.

Chuck and Nicci also volunteered many hours over the previous year on the Steering Committee. Chuck used his contacts in the area as a member of the hospitality sub-committee, and Nicci assisted on the marketing sub-committee. Breakout sessions included training on board building, event and marketing planning, grant writing, and financial training, which Chuck and Erin Johnson even taught a session, "Planned Giving: How To Go for the Big Ask".



CONTACT ONWARD!

33 N. CHESTNUT (P.O. BOX 26)
CORTEZ, CO 81321
(970) 565-9200 PHONE
(970) 564-0264 FAX

WWW.ONWARDFOUNDATION.ORG
CHUCK@ONWARDFOUNDATION.ORG
NICCI@ONWARDFOUNDATION.ORG

FIND US ON FACEBOOK:
WWW.FACEBOOK.COM/ONWARDFOUNDATION



FROM THE PRESIDENT

A few months ago, the Onward! board approved the Larry Larsen Endowed Scholarship Fund. I had the good fortune of meeting and getting to know Larry through ballroom dance. He had excellent rhythm and timing on the dance floor. Larry and my wife, Laurie, always saved a jitter bug and triple swing for each other. Larry would always ask me if he could have this dance with my wife. He was a gentleman. One very interesting piece of history about Larry, he was one of the original Mouseketeers with The Micky Mouse Club. When he passed away, he was the last of the troupe.

Larry was a mechanical engineer by education. He never married. He had one heir, his brother Parry. Larry wanted to leave a legacy. He lived here in Montezuma County and chose Onward! to help build his legacy. After meetings with Onward!, he decided to create a legacy and support future college students from Dolores and Montezuma counties.

Onward! is proud to honor his legacy and manage the Larry Larsen Endowed Scholarship Fund. How many of you have Mickey Mouse ears in your family?

Pete Montaña

FROM THE EXECUTIVE DIRECTOR

Onward! is so proud to be part of our great community. With your support we have had another record year! We manage 58 different funds supporting individuals through scholarships, fiscal funds, and grants to non-profits. These funds amount to a record \$3.09 million in total assets! We have just completed the 2018 grant cycle and received a record number of grant requests (67) from non-profits in Southwest Colorado requesting over \$171,000!

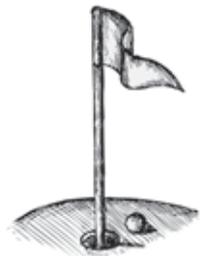
Each year we grow through the generosity of our donors! Two donors decided to build their legacies with us. One donor created the Cushman Fund to support the Cortez Animal Shelter with a substantial estate gift to be invested with Onward!. Now we are able to provide the animal shelter a quarterly grant to be used for general operations. As mentioned in our letter from our board president, Larry Larsen bequeathed a scholarship legacy gift through his estate. This wonderful endowed gift will provide scholarships in perpetuity to local students attending college or trade schools. Both of these people understood how Onward! could build their one-time gifts into lasting, meaningful grants and scholarships.

During 2018, Onward! was able to award it's largest grant ever made to a non-profit! Our donor-advised fund, Golden Dreams Foundation Fund, awarded \$100,000 to the Bridge Emergency Shelter allowing the Bridge to break ground on their new shelter. As our assets grow, we are able to award more grants for larger dollar amounts. Again, this only occurs because of the incredible gifts of individuals and businesses! We have the resources to assist you in building your legacy. Together we can make a difference, strengthen our communities, and build lasting, legacy gifts!

*Sincerely,
Chuck Forth*

MARK YOUR CALENDAR! 4TH ANNUAL PUTT-PUTT TOURNAMENT

February 2018 Onward! went retro and held its 3rd Annual Putt-Putt Tournament to great success. We added a tenth hole to the putt-putt course and enjoyed popping in to multiple new and old locations in downtown Cortez. Thank you to all our hole sponsors which include: Cortez Cultural Center, Cliffrose on Market, Wild Edge Brewing, Moose & More, Gustavo's Mexican Restaurant, Blondie's Trophy Room, Colorado Love Outdoors, Stonefish Sushi & Moore, Loungin' Lizard, and the former Table Top Pizzeria.



SATURDAY, FEBRUARY 2, 2019





DONOR ADVISED LEGACIES

WE CONNECT PEOPLE WHO CARE WITH CAUSES THAT MATTER

- ⊕ The Yellow Jacket Charitable Fund was started in October to help support the Onward! Grant Cycle. This year, the fund supported the School Community Youth Collaborative with additional funding for Teen Maze and Hospice of Montezuma for bereavement services not covered by traditional funding programs.
- ⊕ The Heartwood Fund was started in November to also support our grant cycle. The Heartwood Fund committee chose to support the Four Corners Community Band by funding the Director Honorarium, the City of Dove Creek Recreation with the purchase of new cheer mats for pee-wee cheerleaders, and the Montezuma County Public Health Department in their outreach to the youth immunization program.
- ⊕ The Searle Community Endowment Fund joined in supporting the Onward! Grant Cycle by funding the purchase of food for the Mancos FoodShare, the Durango Cowboy Gathering received funding for youth involvement in the arts, additional funding to the Montezuma County Public Health Department for programming, the Dolores River Boating Advocates for additional youth river trip funds, and San Juan Mountains Association teacher training.
- ⊕ The Education Support Fund purchased canopy “sails” for the outdoor classroom by the Montezuma School to Farm garden.

LARGEST GRANT AWARD TO DATE

2018 saw Onward! make its largest grant award since its inception in 2002. Onward! proudly presented the Bridge Emergency Shelter Executive Director, Laurie Knutson, and her board with a check for \$100,000 from the Golden Dreams Fund for the capital campaign!

The new 11,000 sq. ft. building will be completed next summer, hopefully in June, but weather and construction delays could change that target date. Final costs of the building will be around 2.5 million, including pre-construction design and engineering, the actual construction, furnishings and landscaping. The 12 apartments will allow for up to 27 persons at any one time who want to get off the streets to live in modestly furnished transitional apartments for very low rent. They will have to have a verifiable income source in order to live in the units and agree to abide by the Bridge’s expectations for occupancy. The shelter will have the capacity to provide 7,500 bed nights during the shelter season annually and will likely serve 325-350 different people annually.



BRIDGE BOARD AND STAFF JOINED BY ONWARD! AT THE FALL GROUNDBREAKING



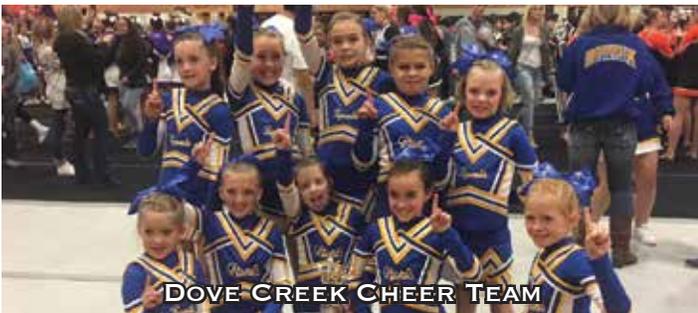
ONWARD! IN OUR COMMUNITY

DURING THE LAST YEAR, ONWARD! AND ITS FUND PARTNERS AWARDED OVER \$305,000 IN GRANTS IN THE FOUR CORNERS' COMMUNITIES. GRANT RECIPIENTS INCLUDE:

- Bridge Emergency Shelter, 4 quarter grants to assist in supporting the Day Labor program
- Bridge Emergency Shelter, 2 semi-annual grants for homeless shelter operations & \$100,000 for the capital campaign
- Community Radio Project (KSJD), and the Sunflower Theatre, 2 semi-annual grants each for operations
- Cortez Public Library, 2 grants for specific library needs including subscriptions and children programs
- Cortez Animal Shelter to support operations
- Salvation Army, 12 monthly grants for their family assistance fund
- M-CHS Media Publication Fund for a conference in Los Angeles
- The Montezuma Senior Center received \$10,000 for general operations
- The Cortez Veterans Fund purchased a beer cooler, bingo machine and upgraded lighting for the American Legion
- Village Center for the Arts for nurturing an environment for artistic creativity for all ages
- Disabled American Veterans for the purchase of a new building

THE DECEMBER 2017 GENERAL ENDOWMENT ENHANCEMENT GRANT RECIPIENTS INCLUDE:

- Dolores River Boating Advocates for a youth river trip
- School Community Youth Collaborative for Teen Maze
- Willowtail Nature Preserve and Education Center for scholarships for local arts practitioners to stay and work one week at the preserve
- Mancos Public Library for general operating support
- San Juan Mountains Association to provide a free two-day teacher workshop about the importance and interconnection of healthy watersheds to area water supplies



DOVE CREEK CHEER TEAM



CORTEZ ANIMAL SHELTER

OVER \$50,500 IN ACADEMIC SCHOLARSHIP MONEY WAS GIVEN TO LOCAL STUDENTS AT THE HIGH SCHOOLS IN THE FOUR CORNERS AREA. THIS SCHOLARSHIP MONEY HELPS THESE STUDENTS IN THEIR POST-SECONDARY ACADEMIC PURSUITS.

MONTEZUMA-CORTEZ HIGH SCHOOL

Coby Baer

Kacie Featherman

Morgan Jones

Josie Sitton

William Broughton

Natasha Gordon

Dylan Long

Katelynn Sweat

Tanner Desrosiers

Trystan Henderson

Sidnie Majors

Hailey White

Jasen Engel

Ahna Higgins

Blair Rice

DOLORES HIGH SCHOOL

Kayleen Bowie

Sierra Schwartz

DOLORES COUNTY HIGH SCHOOL

Kiera Baughman

Mikayla Haskins

MANCOS HIGH SCHOOL

Courtney Firestone

Whitney Gustafson

Marie Fretzie de la Cruz

Roan Russell

Jessica Gutierrez

PAGOSA SPRINGS HIGH SCHOOL

Kimberly Armendariz

Kailey Carr

Hailey Huddleston

Brett Meisinger



JASEN ENGEL THANKING DICK HOOVER FOR THE SCHOLARSHIP AT THE M-CHS AWARDS CEREMONY



AGENCY FUNDS

THE HEART TO HEART FUND

ESTABLISHED: JUNE 2007

Purpose: Provides quality investment return to support the primary missions of pregnancy counseling for women as well as assisting mothers of newborn children.

THE AXIS HEALTH SYSTEM FUND

ESTABLISHED: JUNE 2009

Purpose: Provides additional funding to support their integrated health system services, including their traditional behavioral health services with primary care, wellness, and health lifestyle services.

THE CORTEZ VETERANS FUND

ESTABLISHED: JANUARY 2013

Purpose: Provides additional funding for the Ute Mountain American Legion Post #75.

THE HOSPICE OF MONTEZUMA FUND

ESTABLISHED: JULY 2013

Purpose: Supports ongoing hospice programs and growth within our community.

THE SOUTHWEST MEMORIAL HOSPITAL FOUNDATION FUND

ESTABLISHED: DECEMBER 2013

Purpose: Provides additional funds for the programs of the Southwest Memorial Hospital Foundation.

FIRST ASSEMBLY OF GOD INVESTMENT FUND

ESTABLISHED: MARCH 2016

Purpose: Provides additional funding for activities at First Assembly of God, Cortez, Colorado.

CORTEZ FRIENDS OF D.A.R.E.

ESTABLISHED: JULY 2016

Purpose: Supports the activities and educational curriculum of the Cortez D.A.R.E. Program. D.A.R.E. stands for Drug Abuse Resistance Education. The program has been teaching 5th and 7th grade students in Cortez since 1993.

FOUR CORNERS CHILD ADVOCACY CENTER FUND

ESTABLISHED MAY 2018

Purpose: Supports the work at the FCCAC in Cortez which is to strengthen our community's response to child abuse and neglect through prevention, intervention, education, and advocacy.

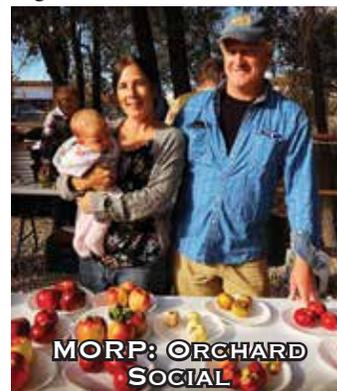
“PEOPLE COMING TOGETHER AS A COMMUNITY CAN MAKE THINGS HAPPEN.”
-Jacob Rees-Megg

BOUNTIFUL HARVEST IN MONTEZUMA COUNT

One apple at a time, **Montezuma Orchard Restoration Project (MORP)** is determined to reach its vision of southwestern Colorado being renowned for an orchard culture and economy based on the legendary quality and diversity of Montezuma Valley Fruits. Through its historic mapping and DNA work, MORP estimates a 50,000 bushel capacity of apples, representing 195 heritage varieties, mostly hit the ground for livestock and wildlife to enjoy. Currently, a team of MORP volunteers is hard at work to make a small dent in this year's abundant fruit crop with a modest goal to pick 1,000 bushels for market.

Montezuma County has a history of growing prize-winning fruits, taking home three gold medals at the 1904 World's Fair in St Louis. Many area historic orchards still exist as remnants of their prior grandeur and sometimes with only a few 100+ year-old trees remaining along a fence line. Fortunately, people who grew up with these old trees still live here to share their stories and knowledge. Together, they and their trees create a living history that few places have retained.

The story of our fruit-growing past is remembered in MORP's work to preserve Colorado's fruit-growing heritage and to restore an orchard culture and economy to the southwestern region. Preservation, Cultural and Economic Revitalization,



and Education & Outreach are specific program areas through which staff and volunteers move MORP towards its vision. Through this work, and direct engagement with knowledgeable people, an active interest in heritage orchards is again taking hold. MORP invites you to share in its passion.

MANY WAYS TO GIVE & RAISE MONEY

Onward! A Legacy Foundation can help your group raise money. Services include:

- 1. Employee payroll deductions** to support your favorite Onward! cause or create a donor advised fund for your business that employees can support.
- 2. Online giving portal.** Onward! offers an online giving portal so your donors can easily set up recurring donations or support your cause with a one-time donation.
- 3. Donor envelopes** to set out at your next event. Stop by the Onward! office to pick up our preprinted donor envelopes to help facilitate giving.

HOW CAN ONWARD! HELP YOU REACH YOUR GOALS IN 2019?



DONOR ADVISED FUNDS

THE SALVATION ARMY FUND AT ONWARD! ESTABLISHED: DECEMBER 2006

Purpose: Established anonymously by two families to provide monthly gifts to the local chapter of the Salvation Army for family services.

THE GOLDEN DREAMS FOUNDATION FUND ESTABLISHED: JANUARY 2010

Purpose: Created through an inheritance gift from a local family. The fund provides grants to non-profit organizations, including a generous multi-year grant to five local nonprofits.

EDUCATION SUPPORT FUND ESTABLISHED: OCTOBER 2015

Purpose: Established by a local family for the benefit of Manaugh Elementary School. Funds are directed to items and activities that will enhance the ability of educators to provide a high quality learning experience.

THE YELLOW JACKET CHARITABLE FUND ESTABLISHED OCTOBER 2017

Purpose: Created by a local Yellow Jacket family to help enhance the Onward! Grant Cycle and support nonprofits in Montezuma County.

THE HEARTWOOD FUND ESTABLISHED NOVEMBER 2017

Purpose: Established by a family in Montezuma County to support non-profits in the four corners area.

CHRISTA CUSHMAN - CORTEZ ANIMAL SHELTER FUND ESTABLISHED MAY 2018

Purpose: Created with a generous donation in the memory of Christa Cushman to support the Cortez Animal Shelter.

ENDOWMENT FUNDS

THE CORTEZ PUBLIC LIBRARY ENDOWMENT FUND

ESTABLISHED: NOVEMBER 2002
Purpose: Provides permanent support for specific library needs, and children's programs, and annual subscription costs through private donations.

THE SEARLE COMMUNITY ENDOWMENT FUND ESTABLISHED: OCTOBER 2003

Purpose: Originally established by Citizens State Bank in honor of their past president, Charles Searle. The fund now awards an annual grant to programs or organizations benefiting the community as a whole.

GENERAL ENDOWMENT FUND OF ONWARD! ESTABLISHED: SEPTEMBER 2009

Purpose: Provides permanent funds for grants and the general operation of the foundation. The yearly grant cycle runs from September 1st to October 15th with numerous grants awarded throughout the community in November.

KSJD ENDOWMENT FUND ESTABLISHED: OCTOBER 2016

Purpose: Supports bringing news, arts and entertainment programs to KSJD and the Sunflower Theatre.



2018 – A VERY GOOD YEAR FOR SOUTHWEST COLORADO CANYONS ALLIANCE!

The Cultural Site Stewardship Program engages trained volunteers in monitoring cultural sites for damage due to human, animal, or natural impacts on BLM/Canyons of the Ancients National Monument (CANM) and on Tres Rios BLM land areas. This year, they added eight new Site Stewards, bringing their total to 56. They also added eight new sites for a total of 96 cultural sites under observation.

They initiated the Wilderness Study Area monitoring program. Ten volunteers hike the approximate 33,000 acres of roadless areas within CANM to report on usage, including hikers, campers, and those using the areas inappropriately, such as ATVs. The Trail Counter Project involves 4 volunteers to download the data from hidden counters on trails and other high-usage areas and replace sign-in sheets at trailheads.

SCCA began managing the education program at Canyons of the Ancients Visitor Center and Museum (CAVM); it sees approximately 2,500 school children each year. SCCA has been awarded \$11,000 in grants and seeks an additional \$5,000-\$6,000 to fund this new educational program.

SCCA initiated and participated in events within CANM: trail maintenance, Alternative Spring Break, and National Public Lands Day. SCCA has funded two events for the BLM this year: volunteer appreciation lunch at CAVM and signage for the special exhibit. They have had numerous activities for our members: presentations, an evening with Hopi performer Ed Kabotie, a tour of Haynie Pueblo, and a special reception.



FISCAL FUNDS

SCHOOL COMMUNITY YOUTH COLLABORATIVE (SCYC)

ESTABLISHED: DECEMBER 2010

Purpose: SCYC creates opportunities for youth to build healthy relationships and to engage in their communities through service learning. Youth gain valuable leadership skills in programs like Teen Maze, Media Ready and Youth Leadership Council. (see related article)

MONTEZUMA TITANS FOOTBALL FUND

ESTABLISHED: JUNE 2012

Purpose: This fund provides support and supplemental funds for the Montezuma Titans Football teams (2nd-6th grade football teams for Cortez and Dolores).

SOUTHWEST COLORADO CANYONS ALLIANCE (SCCA)

ESTABLISHED: JANUARY 2013

Purpose: SCCA supports the missions of Canyons of the Ancients National Monument, Visitor Center, and Museum through financial and volunteer resources. SCCA's mission focuses on the preservation, education, and research of these irreplaceable cultural and natural landscapes. (see related article)

THE 406 PROJECT

ESTABLISHED: MARCH 2015

Purpose: The 406 Project is dedicated to enhancing the youth sports experience by increasing the opportunity for participation, enveloping the training of coaching and athletes with social-emotional skills, and leading service projects that give back to their communities.

LEADERSHIP MONTEZUMA

ESTABLISHED: JUNE 2015

Purpose: The mission of Leadership Montezuma is to identify, enlighten, and encourage emerging leaders of diverse backgrounds, occupations, and cultures for the purpose of enhancing the quality of leadership in the community.

4CORNERS4LIFE

ESTABLISHED: JULY 2017

Purpose: 4Corners4Life works together to create more local resources for people at risk of suicide and to provide more events to bring suicide awareness to all demographics including youth, veterans, seniors, LGBT community, survivors and families who have lost someone to suicide.

DOLORES PLAYGROUND GROUP

ESTABLISHED: DECEMBER 2017

Purpose: This group will raise funds to supplement the Town of Dolores with needs to enhance the playgrounds and further encourage children's' cognitive development while giving them a safe place to play.

DEEP DESERT ARTS COLLECTIVE

ESTABLISHED: MAY 2018

Purpose: This group will bring the community together to participate in the creative process and populate Cortez and our region with public art. They believe creative thinking saves the world. By engaging our community in art exploration they are working to promote open minds, inspire dialogue and collaboration, stimulate an arts economy, nurture art education, and reflect our diverse population.

MONTEZUMA ORCHARD RESTORATION PROJECT (MORP)

ESTABLISHED: JUNE 2018

Purpose: MORP is working to preserve Colorado's fruit-growing heritage and restore an orchard culture and economy to the southwestern region. MORP envisions southwestern Colorado being renowned for an orchard culture and economy based on the legendary quality and diversity of Montezuma Valley Fruits. (see related article)

2017 ENHANCEMENT GRANT DATA



GRANT APPLICATION FUND CATEGORIES

ARTS & CULTURE: 16.7%
 YOUTH: 23.3%
 EDUCATION: 23.3%
 BASIC NEEDS: 13.3%
 SOCIAL SERVICES: 10.0%
 OTHER: 13.3%

40% OF ALL APPLICATIONS RECEIVED FUNDING

HELP US FUND 100% IN 2019.

SCHOLARSHIP FUNDS

GENERAL SCHOLARSHIPS:

THE FRIENDS OF RECREATION FUND

ESTABLISHED: JUNE 2003

Purpose: Raises money for scholarships to the Cortez Recreation Center for those who would otherwise not be able to afford the fees. The primary fund raising project was the "Stones for Scholarship" where by individuals and businesses purchased inscribed stones set around the flagpole in front of the Recreation Center.

THE ESCALANTE CHILDREN'S FOUNDATION FUND

ESTABLISHED: FEBRUARY 2011

Purpose: Established by the Escalante Shrine Club to provide travel assistance for families traveling to Shriners Medical Facilities.



SCHOLARSHIP FUNDS

ACADEMIC SCHOLARSHIPS:

THE BILL AND PEG REES SCHOLARSHIP FUND ESTABLISHED: APRIL 2002

Purpose: Awards multiple, renewable scholarships for goal-oriented students from Montezuma and Dolores counties in post-secondary education programs. This flagship scholarship fund was created through a generous gift from the Estate of Bill Rees.

THE SHAUN M. McANDREW MEMORIAL SCHOLARSHIP FUND ESTABLISHED: MAY 2005

Purpose: This fund was established in memory of Shaun McAndrew who gave so much to this community. The scholarship provides \$1,000 annually to a Montezuma-Cortez High School athlete-scholar for post-secondary education.

THE KNIGHTS MEMORIAL SCHOLARSHIP FUND ESTABLISHED: DECEMBER 2006

Purpose: The Knights of Columbus established a memorial scholarship fund to provide an annual \$1,000 scholarship for post-secondary education.

THE BLUE ZENITH SCHOLARSHIP FUND ESTABLISHED: DECEMBER 2009

Purpose: Awards multiple, renewable, full-ride scholarships to students from Mancos High School for post-secondary education.

THE MANCOS CENTENNIAL SCHOLARSHIP FUND ESTABLISHED: JANUARY 2010

Purpose: This scholarship commemorates the 100th anniversary of the Mancos School District by awarding annual scholarships to students from Mancos High School for post-secondary education.

THE LEONARD CAIN MEDICAL SCHOLARSHIP FUND ESTABLISHED: DECEMBER 2010

Purpose: Dr. Leonard Cain's family and friends established this fund to provide annual post-secondary scholarships in a medical field of study to students of Montezuma or Dolores County.

THE CONE FAMILY SCHOLARSHIP FUND ESTABLISHED: MARCH 2012

Purpose: This fund provides two scholarships:

1. The Henry Scholarship: for Montezuma County seniors who will study engineering or a hard science
2. The Bill Scholarship: for Montezuma County seniors enrolling in a 2 or 4 year institution

THE MONTEZUMA-CORTEZ HIGH SCHOOL (M-CHS) ALUMNI SCHOLARSHIP FUND ESTABLISHED: MARCH 2012

Purpose: M-CHS Alumni created this fund for scholarships for post-secondary education for M-CHS graduates.

THE VIC AND ETHEL POMA PAGOSA SPRINGS SCHOLARSHIP FUND ESTABLISHED: DECEMBER 2013

Purpose: The Poma family created this scholarship fund for graduates of Pagosa Springs High School.

This fund provides two scholarships:

1. Trade School Scholarship
2. Traditional 4 Year Institution Scholarship

THE WOODS CANYON SCHOLARSHIP FUND ESTABLISHED: JUNE 2014

Purpose: Awards post-secondary scholarships to employees' dependents of Woods Canyon Archaeological Consultants, Inc.

THE HOOVER ENDOWED MEDICAL SCHOLARSHIP FUND ESTABLISHED: DECEMBER 2017

Purpose: Awards post-secondary scholarships to high school graduates from Dolores and Montezuma counties for post-secondary study in the medical field.

MONTEZUMA COUNTY FAIR ROYALTY SCHOLARSHIP FUND ESTABLISHED: MAY 2018

Purpose: This scholarship fund was created to benefit those selected to the Montezuma County 4H Fair Royalty.

ROLAND R. SCHNEIDER MEMORIAL SCHOLARSHIP FUND ESTABLISHED: JULY 2018

Purpose: This scholarship (originally managed by First National Bank, Cortez) was created to benefit M-CHS graduates as they further their education with either a two-year associates degree or a four-year bachelor's degree.

TRI-CITY SOCCER ASSOCIATION ACADEMIC COLLEGE SCHOLARSHIP FUND ESTABLISHED: AUGUST 2018

Purpose: This scholarship was established by the local youth soccer organization to support M-CHS Varsity Soccer athletes as they pursue their post-secondary education. Scholarship application information to be posted soon.

LARRY LARSEN ENDOWED SCHOLARSHIP FUND ESTABLISHED SEPTEMBER 2018

Purpose: Awards multiple, renewable scholarships for goal-oriented students from Montezuma and Dolores counties in post-secondary education programs. Students who apply for the Bill and Peg Rees Scholarship are automatically considered for this scholarship in memory of long time Cortez resident, Larry Larsen, who passed away in 2018.

**“THE HEART THAT GIVES,
GATHERS.”**

-Tao te Ching



SPECIFIC INTEREST FUNDS

ONWARD! GENERAL FUND

ESTABLISHED: APRIL 2002

Purpose: Used for the operations of the foundation. It is unrestricted and the income is generated from the annual 1% management fee assessed on the invested funds and management of fiscal funds.

THE DOLORES LIBRARY DISTRICT FUND IN MEMORY OF CLIFFORD C. FOSSUM

ESTABLISHED: JULY 2004

Purpose: Supports specific library needs and programs at the Dolores Public Library. The fund was established in memory of Clifford C. Fossum, a local citizen who was an avid supporter of the Dolores Public Library.

SENIOR SERVICES FOUNDATION FUND

ESTABLISHED: MAY 2006

Purpose: Provides earnings to supplement programs at the Montezuma County Senior Center.

THE MONTEZUMA COUNTY SHERIFF'S OFFICE EMPLOYEE FUND

ESTABLISHED: NOVEMBER 2007

Purpose: Assists the sheriff's office employees in the event of a tragedy or major medical situation. The fund maintains a minimum fund balance of \$10,000 and is funded by private donations.

THE FRIENDS OF THE CORTEZ LIBRARY FUND

ESTABLISHED: JANUARY 2008

Purpose: Provides additional earnings to the Friends group which in turn provides support to the Cortez Public Library.

THE UTE MOUNTAIN ROUNDUP RESERVE FUND

ESTABLISHED: AUGUST 2009

Purpose: Creates a reserve fund for future capital improvements at the Montezuma County Fairgrounds. Recent improvement include the addition of a roof to the grandstands and new chutes for the outdoor arena.

THE MANCOS LIBRARY FOUNDATION FUND

ESTABLISHED: JUNE 2012

Purpose: This fund was created by patrons of the library to support specific needs and programs at the Mancos Public Library.

THE 100 CLUB OF MONTEZUMA COUNTY FUND

ESTABLISHED: NOVEMBER 2013

Purpose: Provides immediate financial assistance for the families of all first responders who have lost their lives in the line of duty in Montezuma and Dolores counties.

CORTEZ ROTARY INVESTMENT FUND

ESTABLISHED: OCTOBER 2016

Purpose: Creates added income to support various Cortez Rotary projects including the Imagination Library Program.

COX FAMILY CHARITABLE REMAINDER TRUST

ESTABLISHED MAY 2018

Purpose: Onward! manages this trust for the beneficiaries.



21ST CCLC KAYAK GROUP

SCYC AWARDED LARGE GRANT FOR TWO LOCAL HIGH SCHOOL PROGRAMS

School Community Youth Collaborative has had a big year, with many exciting new programs. SCYC was awarded a 21st Century Community Learning Centers (CCLC) grant, through the Department of Education, to provide before and after school programming at Southwest Open School and Montezuma-Cortez High School.

Through 21st Century Community Learning Centers funding, MCHS is able to host: morning movement, life skills, tutoring, structured study hall, credit recovery, Youth Leadership Council (a SCYC program), engineering club, robotics club, field trips to colleges and universities, and summer school. SCYC is serving 193 youth at MCHS through 21st CCLC programming.

At Southwest Open School, the following programs are being offered: fly fishing, kayaking, cooking, rec center trips, board game club, credit recovery, and school-based enterprise. SCYC is serving 76 youth at SWOS through 21st CCLC programming.

SCYC and 21st CCLC are also partnering with Montezuma Inspire Coalition to provide field trips to Fozzie's Farm for the agriculture class at MCHS, the Pinon Project to provide Strengthening Families and Financial Health Planning at SWOS, and the Adult Education Center to provide free GED/HiSet classes and testing to parents of youth from MCHS and SWOS as well as any youth who have aged out of high school.



SOUTHWEST OPEN SCHOOL STUDENTS



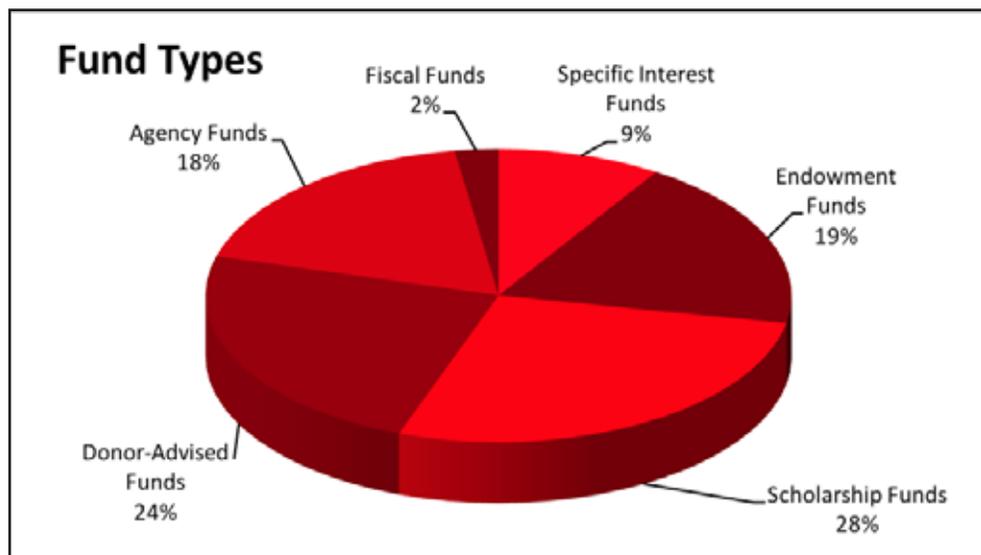
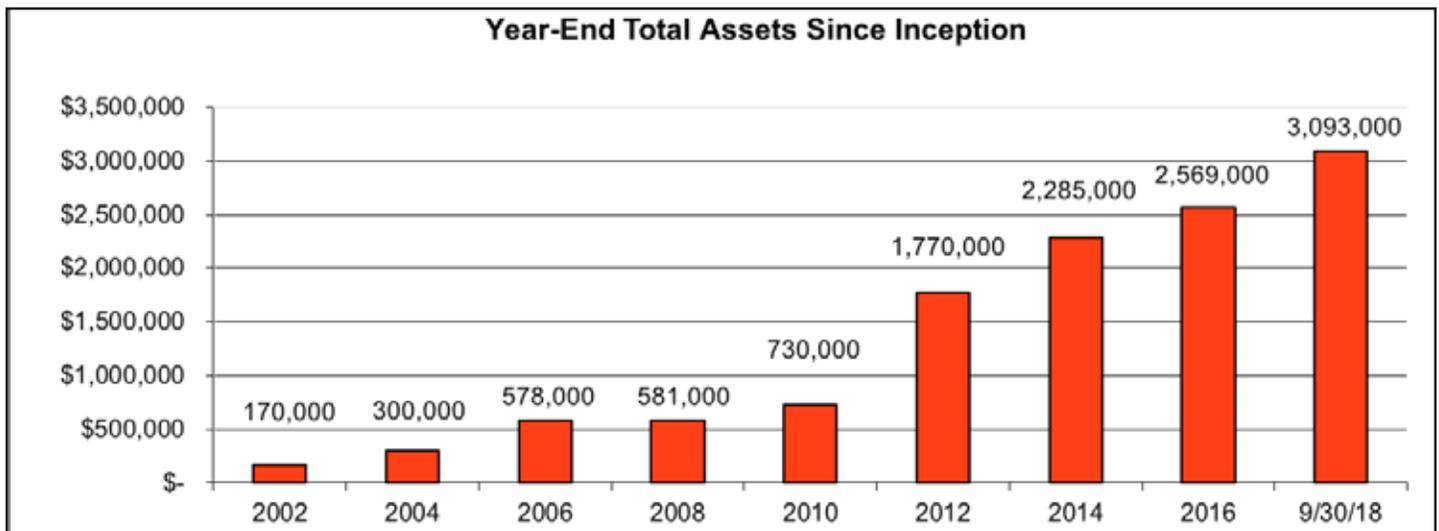
FINANCIAL OVERVIEW

STATEMENTS OF FINANCIAL POSITION

	12/31/17	9/30/18
Assets		
Cash	\$ 36,962	\$ 200,520
Current assets	12,774	24,337
Investments	<u>2,707,492</u>	<u>2,868,489</u>
Total assets	<u><u>\$ 2,757,228</u></u>	<u><u>\$ 3,093,346</u></u>
Liabilities		
Current liabilities	\$ 5,947	\$ 13,689
Agency funds	<u>596,234</u>	<u>563,066</u>
Total liabilities	<u>602,181</u>	<u>576,755</u>
Net assets	<u>2,155,047</u>	<u>2,516,591</u>
Total liabilities and net assets	<u><u>\$ 2,757,228</u></u>	<u><u>\$ 3,093,346</u></u>

STATEMENTS OF ACTIVITIES

	Year End 12/31/17	Nine Months Ended 9/30/18
Support and revenue		
Contributions	\$ 193,634	\$ 538,248
Fundraising	29,816	35,247
Grants	110,593	173,986
Investment earnings	220,134	24,478
Management fees	31,408	29,363
Program fees	<u>8,485</u>	<u>9,061</u>
Total support and revenue	594,070	810,383
Expenditures		
Fundraising	43,635	18,502
Grants	177,304	169,284
Payroll	112,062	130,673
Programs/Scholarships	94,111	100,441
Support services	<u>16,417</u>	<u>29,940</u>
Total expenditures	443,529	448,840
Increase in net assets	<u><u>\$ 150,541</u></u>	<u><u>\$ 361,543</u></u>



** Audited financial report available upon request from the Onward! A Legacy Foundation office or found online.**

ONWARD!

ONWARD! A LEGACY FOUNDATION



P.O. Box 26
33 N. CHESTNUT
CORTEZ, CO 81321

IS A COMMUNITY FOUNDATION FUND RIGHT FOR YOU?

Onward! A Legacy Foundation offers the opportunity for all individuals and groups to generate income for their important causes. Partner with Onward! to:

-  Simplify philanthropic giving
-  Avoid the expense and complexity of creating a private foundation or separate non-profit organization
-  Pool assets for higher yields and lower administrative costs
-  Utilize a dedicated volunteer board of directors who assures that its investment strategies are prudent and operates in an effective and efficient manner
-  Employ the insights of the highly experienced professionals on our financial advisory committee to monitor your investments
-  Support your favorite cause in a variety of ways: through a gift in your will, gift of cash, donation of stock, gift of insurance, or donations of land or other property

From its creation in 2002 to the present, Onward! has grown from managing \$78,000 in assets in one fund to managing over \$3.09 million in assets in 58 different funds, generating an average annual return of 7%.

CREATE A LEGACY WITH ONWARD!