

2023

ONWARD!



What's Your Passion?

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

BOARD OF DIRECTORS

Pete Montano – President
David Coit – Vice President
Robby Henes – Secretary
Youvonne Neeley – Treasurer
Laura Herrick
MB McAfee
Jessie Farias
Rebecca Samulski

INVESTMENT ADVISORY COMMITTEE

Walt Henes
Marty McKean
Youvonne Neeley
David Coit
Tom Helms – Financial Advisor
Andrew Cuckie – Financial Advisor

ONWARD! STAFF

Chuck Forth – Executive Director
Vanessa Malloy – Executive Program Director
Misty Hatel – Executive Assistant
Tharimae Jones – Operations Manager
Rebecca Tevault – Staff Accountant



ONWARD! CORE VALUES

We Serve With Visionary Leadership

We strive for collaborative and equitable relationships to benefit the future of our community.

"Leadership is the art of giving people a platform to spread ideas that work." -Seth Godin

We Steward Investments With Integrity

We tend your generous contributions with active engagement, opportunities for growth, and long-term considerations.

"Investing isn't a value system, it's an investing strategy, but it works better if you're fighting for something you truly believe in." -Phil Town

We Cultivate A Culture Of Giving and Caring

We make a difference through local philanthropy.

"Philanthropy, like charity, must begin at home; from this center our sympathies should extend in an ever-widening circle." -Charles Lamb

We Embrace Excellence

We strive for excellence through reliability, accountability, and professionalism.

"Excellence is never an accident; it is the result of high intention, sincere effort, intelligent direction, skillful execution and the vision to see obstacles as opportunities." -Aristotle

We Forge Innovative Growth

As catalysts in our community, we work to move peoples' passions to actions, while acknowledging our foundation of diverse histories, cultures, and experiences.

"Sometimes you have to create a vision, a path for a vision. It may not be apparent, and you may have to forge it yourself." -Herbie Hancock

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FROM THE PRESIDENT

We cultivate a culture of giving and caring. We make a difference through local philanthropy.

This is a core value of Onward!. We strongly support local giving and caring within our community. Many of our board members give of their time and monies to support the community they live in. This is why they volunteer to serve on the Onward! board, to help make a difference.

The funds with Onward! also exist for the betterment of our community. We are honored to work with these funds to help achieve their goals that serve our community.

*Respectfully,
Pete Montañó*

FROM THE EXECUTIVE DIRECTOR

From all of us at Onward!, we want to express our sincere gratitude to all of our gracious donors, selfless volunteers and hard-working staff that make Onward! such a successful non-profit! As I complete my 15th year as the Executive Director (hard to believe), our impact and growth continue to amaze me!

During the last year, Onward!'s fund advisors provided and awarded grants and scholarships totaling over \$803,000! We know those funds help to make our communities stronger and more equitable. Let us acknowledge all the incredible volunteers who serve as fund advisors for our 100+ funds!

As we close this year, I must also commend the awesome staff, both with the general fund and all the fiscal funds, that provide all the programing and administrative support to accomplish everything done last year! Currently, Onward! is transitioning its financial accounting software to a state of the art, donor-friendly, and online portal access platform for all our funds! This is huge lift for the General Fund staff and they have put in the extra hours to make this a reality. We should be fully transitioned by the end of the year.

This new software exhibits our commitment to embrace excellence as we will be able to provide more accountability and transparency to the funds we manage. It is an exciting time to be a part of Onward! A Legacy Foundation!

*Sincerely,
Chuck Forth*

At Onward! A Legacy Foundation...

We serve with visionary leadership	We steward investments with integrity	We cultivate a culture of giving and caring	We embrace excellence	We forge innovative growth
At Onward! A Legacy Foundation, together, we elevate our communities.				



DONOR ADVISED LEGACIES

WE CONNECT PEOPLE WHO CARE WITH CAUSES THAT MATTER
2023 GRANT AWARDEES

Yellow Jacket Charitable Fund: supported Lewis Arriola Community Center, Southwest Colorado Canyons Alliance

Heart of Axis Fund: supported Housing Solutions for the Southwest, La Plata County Collaborative Management Program (CMP), The Grief Center of SW CO, Veterans for Veterans of Archuleta County

Heartwood Fund: supported Dolores Watershed Resilient Forest Collaborative, Dove's Nest, Durango Cowboy Poetry Gathering Inc, Four Corners Community Band, Montezuma County Search and Rescue, Reaching Out to Community and Kids, Students Tackling Unhealthy Decisions

Searle Community Endowment Fund: supported Hospice of Montezuma, Inc., Lewis Arriola Community Center

Golden Dreams Foundation Fund: supported Bridge Emergency Shelter, Four Corners Child Advocacy Center, Renew, Inc.

Congratulations!

ONWARD! IN OUR COMMUNITY

DURING THE LAST YEAR, ONWARD! AND ITS FUND PARTNERS AWARDED OVER \$77,000 IN GRANTS THROUGHOUT THE FOUR CORNERS' COMMUNITIES.

THE 2023 GENERAL ENDOWMENT ENHANCEMENT GRANT RECIPIENTS INCLUDE:

20Moons Dance Theatre

DARE to be You

Indigenous Wellbriety Program

K-9 Search and Rescue Team, Inc.

Montezuma Leadership Network

Montezuma Orchard Restoration Project

Southwest Colorado Canyons Alliance

The Powerhouse



2022 General Endowment Enhancement Grant Recipients



SCHOLARSHIPS IN OUR COMMUNITY



Academic scholarship money was given to 27 local students at the high schools in the Four Corners area. This scholarship money helps these students in their post-secondary academic pursuits at many of the higher educational institutions listed above.

MONTEZUMA-CORTEZ HIGH SCHOOL

Izabella Balfour
Lexie Burton
Gabriel Crowley
Simeon Erlandson

Ashlyn Hall
Amber Hebbard
Micah Hoffman
Max Howell

Evan LaMunyon
Isaak Lewis
Lizabeth Likes
Quinn Maness

Thayer Plewe
Willa Rice
Sariah Robinson
Gillian Schuenemeyer

DOVE CREEK HIGH SCHOOL

Trista Barnett

Cole Taber

MANCOS HIGH SCHOOL

Riley Cannon
Lilly Figueroa

Gregory Greenlee
Kenyon Rosales

Audrey Stockton
Jessie Wallace

SOUTHWEST OPEN HIGH SCHOOL

Clay Sanderson

PAGOSA SPRINGS HIGH SCHOOL

Justin Rivas

Emma Gantt





AGENCY FUNDS

THE HEART TO HEART FUND

Established: June 2007

THE AXIS HEALTH SYSTEM FUND

Established: June 2009

THE SOUTHWEST MEMORIAL HOSPITAL FOUNDATION FUND

Established: December 2013

FOUR CORNERS CHILD ADVOCACY CENTER FUND

Established May 2018

GALLOPING GOOSE HISTORICAL SOCIETY

Established January 2019

MONTEZUMA HERITAGE MUSEUM

Established December 2020

THE BRIDGE EMERGENCY SHELTER FUND

Established November 2021

What is an agency fund?

Agency funds are created by non-profit 501(c)(3) organizations with Onward! for managing long-term funds.

These funds give organizations the opportunity to save dollars in a professionally managed fund that can generate investment income, year after year, but also remains fully accessible with a vote of the nonprofit's board. A portion of the earned income can be drawn down in set annual payments or reinvested in the fund to grow over time, according to the organization's needs. It's a flexible, simple way for nonprofits to build funds for a project or future operational needs. Agencies can also choose to create an endowed fund to maintain a principal balance for the future.

"People coming together as a community can make things happen."

-Jacob Rees-Mogg

DONOR ADVISED FUNDS

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 local nonprofits.

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 non-profits 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

Established May 2018

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

SEEDING KSJD'S FUTURE FUND

Established May 2019

Purpose: Established through a local donor to create a fund that looks towards helping KSJD as they grown in the future especially towards capital investments and expenditures.

What is a Donor Advised fund?

Donor-Advised funds allow donors the most flexibility to achieve their charitable purposes and are a simple alternative to a Family Foundation. Create a donor advised fund with Onward! A Legacy Foundation's help to navigate the process. With six easy steps, your legacy can make a mark in our community.

1. Make a gift of cash, securities, real estate or other assets to Onward!
2. Onward! creates a special fund in your name, or the name you select
3. You receive a tax benefit in the year your gift is made
4. You recommend uses for the fund
5. Onward! ensures that recipients of the fund are IRS-recognized nonprofits in good standing
6. Onward! handles the administrative details and pays grants to charities in the name of your fund

These funds are designed for donors to be actively involved in directing how the funds are used.



SCHOOL YOUTH COMMUNITY COLLABORATIVE



There is something wonderful about young people aged 9-25. These individuals are incredibly curious, constantly yearning for more information about themselves, their peers, and the community around them. Many of them take this time in their lives to discover what they are passionate about, often exploring multiple interests.

As a youth-serving organization focused on the age group of 9-25, School Community Youth Collaborative (SCYC) helps these young people explore their curiosity through our out-of-school time programs, substance use prevention programs, and our gear lending library. Let's highlight some recent successes in our out-of-school time programs and gear lending library.

SCYC's out-of-school time programs have been ongoing at Montezuma-Cortez Middle School, Mancos Schools, and Southwest Open School. Each of these schools uses a club-based model, allowing students to attend different clubs after school. At both Mancos Schools and M-CMS, clubs are offered every day after school and some days before school. Since the beginning of the school year, SCYC has served 538 unduplicated students through our out-of-school time programs, a number that will continue to grow.



This year, SCYC's gear lending library had its most significant year yet, serving over 50,000 hours of gear rentals at no cost to Montezuma County residents. Paddleboards were the most popular items, and we're open to suggestions for future library additions. Additionally, SCYC hosted its first-ever Family Campout, bringing four families outside for an entire weekend. This program allowed families, experienced or new campers, to relax and spend quality time together in the beautiful area we live in.

Spending time outside is not always easy, but there's something powerful about doing something you're scared to do in a group setting. SCYC provided families with the opportunity to increase their sense of confidence, allowing individuals to step outside their comfort zone and grow. We provided all of the meals, planned all of the camping weekend logistics and provided any gear that was needed by families. Taking away the planning process, we hope, was a huge lift for families, as they had to show up and be themselves! Even in the two days we spent with these families, we witnessed growth, as someone who had never been camping before set up their own tent, and younger kids joined for a longer, more difficult hike.

As an organization, SCYC supports connection, communication, youth leadership, and community. As the 2023 year wraps up, we're excited to continue serving our community, providing opportunities for young people to explore, families to step outside their comfort zones, and the community to thrive. As our community thrives, we will inherently create young people that are valued and thriving members of our community.





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 annual grants to programs or organizations benefiting the region 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.

WHAT IS AN ENDOWMENT FUND?

Endowment funds manage assets in perpetuity and distribute the earnings annually to the beneficiary non-profit or scholarship.

The principal amount of gifts and bequests that are accepted are subject to a requirement that the principal be maintained intact and invested to create a source of income for a specific purpose. Endowment funds managed by Onward! earn market rates of return.

WHAT IS A SPECIFIC INTEREST FUND?

Specific interest funds can resemble other funds with Onward!. A specific interested fund can be set up by a donor to support his/her favorite non-profit organization over time. While a donor advised fund gives flexibility as to the recipient year to year, specific interest funds are designated to carry out the donor's specific wish annually.

Specific interest funds can also bring together a group of people to support a charitable interest in our community without creating a new 501(c)(3). Examples of this include the Ute Mountain Roundup Reserve Fund, and the various friends of the library funds.

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 fees of fiscal fund sponsorship.

DOLORES PUBLIC LIBRARY FOUNDATION

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.

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 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.

THE MANCOS LIBRARY FOUNDATION FUND

Established: June 2012

Purpose: Support specific needs and programs at the Mancos Public Library and was created by library patrons.

COX FAMILY CHARITABLE REMAINDER TRUST

Established May 2018

Purpose: Onward! manages this trust for the beneficiaries.

AXIS EMPLOYEE GIVING FUND

Established February 2019

Purpose: Establishes charitable giving from the employees of Axis Health System via employee committee review during the Onward! grant cycle.

IMAGINATION LIBRARY DOLORES COUNTY

Established June 2021

Purpose: Book gifting program that mails free books to children from their birth to their 5th birthday. Applications are available at the Dove Creek & Rico Libraries.

IMAGINATION LIBRARY MONTEZUMA COUNTY

Established June 2021

Purpose: Book gifting program that mails free books to children from their birth to their 5th birthday. Applications are available at local libraries and the Montezuma County Public Health Dept.



EMPLOYEE PRODUCE SHARE PROGRAM



THE PROGRAM

2023 was the 3rd consecutive year that Centura Health, Mercy Regional Medical Center, and The Good Food Collective collaborated to provide the Roots of Health Employee Produceshare Program (ROH).

The program provides produceshares from local farms to Mercy hospital associates. Participants pay for their shares on a sliding scale. The goals of the program are:

- 1) Promote healthy behaviors and improve health outcomes for Mercy associates**
- 2) Support local agriculture**
- 3) Increase short and long-term food security and awareness of local food assistance among Mercy associates**

THE IMPACT



130 produceshare participants



3 local farms using sustainable growing methods supported



~18,200 pounds of healthy, sustainably grown produce circulated in our local food system



236 unclaimed shares re-distributed to 11 food assistance providers across La Plata, Montezuma, & Archuleta Counties and the Southern Ute tribe



\$58,240 invested in our region's small-scale producers

"I really incorporated the variety into my family's meal plan- it was so great."

-2023 participant



FISCAL FUNDS

SCHOOL COMMUNITY YOUTH COLLABORATIVE

Established: December 2010

Purpose: SCYC creates opportunities for youth to build healthy relationships and to engage in their communities through service learning.

STUDENTS TACKLING UNHEALTHY DECISIONS

Established: December 2010

Purpose: STUD is made up of student leaders conversing within their communities in Montezuma & Dolores counties to prevent substance abuse.

CORTEZ PANTHERS FOOTBALL FUND

Established: June 2012

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

SOUTHWEST COLORADO CANYONS ALLIANCE

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.

MONTEZUMA LEADERSHIP NETWORK

Established: June 2015

Purpose: The mission 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.

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.

MONTEZUMA ORCHARD RESTORATION PROJECT

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.

FRIENDS OF RECREATION

Established March 2019

Purpose: Dedicated to raising funds for a healthy community. Fundraising efforts provide scholarships, which cover membership fees to The City of Cortez Recreation Center.

GOOD FOOD COLLECTIVE

Established: April 2019

Purpose: The Good Food Collective exists to strengthen the regional food system in La Plata & Montezuma counties by capturing excess fresh, local food from backyard gardens, area fruit trees and farms and using it to create jobs, feed people, spark our economy, and build community!

FOUR CORNERS DANCE SOCIETY

Established: August 2019

Purpose: The Society is a group of dance enthusiasts who work to insure the longevity of access to ballroom, Latin, swing, and other dance opportunities.

CONSTRUYENDO

Established: September 2019

Purpose: CPR/Construyendo Poder Retreats was founded in 2018 to meet a need for trauma support for families within the Immigrant community. CPR combined efforts with Herb Hut Free Clinic, a mobile alternative clinic for underserved people in La Plata County. They joined ideas into an organization that today they call Construyendo.

SAN JUAN MOUNTAIN SOLES

Established November 2019

San Juan Mountain SOLES inspires young women to lead healthy, fulfilling lives rooted in big mountains, confident leadership and community engagement.

D'VOCE COMMUNITY CHOIR

Established November 2019

Purpose: D'Voce Community Choir began in 2019 with the vision of bringing Christ-centered music to Montezuma County.

DARE TO BE YOU

Established January 2020

Purpose: An evidence-based model program to build strengths in youth by working with them through family, school, and community organizations to reduce problem behaviors such as substance abuse, school dropout and other risky behaviors.

DOLORES YOUTH BASEBALL

Established February 2020

Purpose: The goal for Dolores Youth Baseball is to bring baseball back to the Dolores community for the children who attend the Dolores School District in order to learn and grown while playing baseball together.

360 ARTS MOSAIC

Established March 2020

Purpose: The mission for 360 Arts Mosaic is to bring together community in celebration of the creative arts through performance, education and mentoring.

OHANA KULEANA COMMUNITY GARDEN

Established May 2020

Purpose: Located in Durango, the Ohana Kuleana Community Garden envisions healthy, abundant living through promoting organic growing to enhance sustainability for everyone.

From its creation in 2002 to the present, Onward! has grown from managing \$78,000 in assets in one fund to managing over \$5.9 million in assets in 115 different funds.



FOUR CORNERS SLOW MONEY

Established August 2020

Purpose: Through micro and small loans, Four Corners Slow Money's goal is to build a robust local food economy by giving community farmers, growers and local food enterprises a leg up in the Four Corners region.

DOLORES WATERSHED RESILIENT FOREST COLLABORATIVE (DWRP)

Established September 2020

Purpose: Dolores Watershed Resilient Forest Collaborative (DWRP) promotes forest, community, and watershed resilience through collaboration with local partners.

20MOONS DANCE THEATRE

Established December 2020

Purpose: Helping bring community voices into action, art, expression and transformation.

STRANDED MOTORISTS

Established March 2021

Purpose: Establish relationships with quality repair facilities throughout Colorado and work with them to cover the cost of repairs for people who need it most.

LOR FOUNDATION FISCAL FUND

Established June 2021

Purpose: Provide individuals a source for grant funds to use towards charitable and educational pursuits within Cortez.

HOMEGROWN TALENT INITIATIVE - CORTEZ

Established March 2022

Purpose: The work involves building structures, strategies, and programs within the school that allow students more opportunities to discover their true path to post-secondary success.

CORTEZ FARMERS MARKET

Established March 2022

Purpose: We are a group of independent producers who want to support the local community with locally grown produce, dry beans, eggs, local meats, fresh flowers, local honey, homemade goods, and specialty vendors selling prepared foods, and beverages.

DURANGO WILD SOUL

Established August 2022

Purpose: To create a place that fosters children's ability to stay connected to the divine spark within while rooting deeply into the earth, nature and community.

CORTEZ BMX

Established September 2022

Purpose: To provide a safe, fun, and competitive racing environment. Promote sportsmanship, leadership, and hard work through a racing atmosphere that values encouragement, accomplishment, and physical activity.

CORTEZ PICKLEBALL CLUB

Established October 2022

Purpose: To encourage the growth and development of pickleball in the Cortez area.

CORTEZ ROTARY PROJECT FUND

Established November 2022

Purpose: Rotary is where neighbors, friends, and problem-solvers share ideas, join leaders and take action.

MCHS BAND BOOSTERS

Established December 2022

Purpose: To provide essential funding and support for the MCHS Band Program through the school year.

SHIFTING GEARS

Established January 2023

Purpose: To help break down barriers to outdoor recreation for the local community. To partner with other non-profits to provide gear, training, and outings aimed at local mountain bikers, youth, and populations who have had a historically difficult time recreating in our outdoor spaces.

SEED AND FOOD SECURITY FUND

Established February 2023

Purpose: To renew and strengthen communities by stewarding the land and guiding the health of seed, food, and people.

FOR LOVE AND BABES

Established March 2023

Purpose: To create a safe place for mothers to gather, share and support one another through deep listening and compassion.

LOST CANYON BIKE AND SKATE PARK

Established March 2023

Purpose: To raise funds to add a permanent, low maintenance bike & skate park to Joe Rowell Park.

HEIDI MOUNTAINS COOPERATIVE

Established August 2023

Purpose: Providing residential space, community, facilities and programming in a High Desert and High Mountain region to deepen relationships among diverse people and across diverse ecosystems through science and faith.

MCHS DRAMA BOOSTERS

Established November 2023

Purpose: To provide support and funding to the MCHS Drama Department throughout the school year

WHAT IS A FISCAL FUND?

To further assist the non-profit community, Onward! supports numerous groups and initiatives by being their Fiscal Sponsor. This fiscal sponsorship is an agreement between Onward! and the group/initiative/project which is providing or meeting a community need and requires non-profit recognition. Once the group is sponsored by Onward!, they are provided the benefits of a 501(c)(3) tax-exempt status and all their financial activity is recorded on the Onward! books.



SCHOLARSHIP FUNDS

ACADEMIC SCHOLARSHIPS:

BILL AND PEG REES SCHOLARSHIP

Established: April 2002

Purpose: Awards renewable scholarships for goal-oriented students from Montezuma and Dolores counties in post-secondary education programs.

SHAUN M. MCANDREW MEMORIAL SCHOLARSHIP

Established: May 2005

Purpose: This fund was established in memory of Shaun McAndrew to support a Montezuma-Cortez High School athlete-scholar for post-secondary education.

KNIGHTS MEMORIAL SCHOLARSHIP

Established: December 2006

Purpose: The Knights of Columbus established a memorial scholarship fund to provide a scholarship for post-secondary education.

MANCOS CENTENNIAL SCHOLARSHIP

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.

LEONARD CAIN MEDICAL SCHOLARSHIP

Established: December 2010

Purpose: Provide annual post-secondary scholarships in a medical field of study to students of Montezuma or Dolores County.

CONE FAMILY SCHOLARSHIP

Established: March 2012

Purpose: This fund provides two scholarships for Montezuma County Seniors: the Henry Scholarship & the Bill Scholarship.

M-CHS ALUMNI SCHOLARSHIP

Established: March 2012

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

VIC AND ETHEL POMA PAGOSA SPRINGS SCHOLARSHIP

Established: December 2013

Purpose: The Poma family created

this scholarship fund for graduates of Pagosa Springs High School for both trade school and four-year institutions.

WOODS CANYON SCHOLARSHIP

Established: June 2014

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

HOOVER ENDOWED MEDICAL SCHOLARSHIP

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.

ROLAND R. SCHNEIDER MEMORIAL SCHOLARSHIP

Established: July 2018

Purpose: This scholarship 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

Established: August 2018

Purpose: This scholarship was established by the local youth soccer organization to support M-CHS Varsity Soccer athletes as they pursue post-secondary education.

LARRY LARSEN ENDOWED SCHOLARSHIP

Established September 2018

Purpose: Renewable scholarships for goal-oriented students from Montezuma and Dolores counties in post-secondary education programs. This scholarship in memory of long time Cortez resident, Larry Larsen.

MICHELLE YVONNE TAYLOR SCHOLARSHIP IN EDUCATION

Established November 2018

Purpose: Awards scholarship for M-CHS seniors pursuing post-secondary study in the field of education in memory of former teacher Michelle Taylor.

WILL LINDSAY MEMORIAL SCHOLARSHIP

Established May 2019

Purpose: Established in honor of Sergeant 1st Class Will Lindsay who passed away in the line of duty. The funds from this scholarship will be used to assist others in the added expenses of joining the armed forces out of M-CHS.

HEARTWOOD SCHOLARSHIP

Established: March 2020

Purpose: Awards post-secondary scholarships to employees' children and grandchildren of Muscanell Millworks.

EDDIE MARSHALL MEMORIAL SCHOLARSHIP

Established: August 2021

Purpose: Provide higher education opportunities for students pursuing a degree in Speech and Language Pathology or Special Education.

ALLEN LICHLITER MEMORIAL SCHOLARSHIP

Established: January 2022

Purpose: Annual scholarship for graduates desiring higher education at college, vocational, technical or art school.

JOEL STEVENSON MEMORIAL SCHOLARSHIP

Established: April 2022

Purpose: Awards scholarships for graduates seeking higher education.

GENERAL SCHOLARSHIPS:

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.

FRIENDS OF RECREATION

Established March 2019

Purpose: Dedicated to raising funds for a healthy community. Fundraising efforts provide scholarships which cover membership fees to The City of Cortez Recreation Center.



How has a scholarship fueled your passion?



Hello! My name is Sariah Robinson, I am from Cortez, Colorado and I am currently a sophomore at Arizona Christian University in Glendale, Arizona. I was born and raised in Cortez and graduated from M-CHS. At Arizona Christian, I am in Interdisciplinary Studies with a track in Child Development and a track in General Sciences. My plan is to continue my education with my Master of Speech-Language Pathology and to work in a school district with kids. This year I was blessed to receive two scholarships from Onward; I received the Eddie Marshall and the Roland Schneider scholarships. The Eddie Marshall Scholarship goes to students who want to get their education in Special Ed or Speech Pathology. The Roland Schneider Scholarship is awarded to students who want to continue their education in a two or four-year program. With these scholarships, the Onward Legacy Foundation supported me with \$8,000 for my 2023-2024 academic school year. Onward has a range of scholarships from specific scholarships to scholarships that are broad. With my passion for helping people and my want to become a Speech Pathologist, Onward helped me continue my education and make this possible.

Hello my name is Andres Moreno, I am from Mancos Colorado and a 2022 Mancos High School alumni. I am currently in my third semester at the University of New Mexico. My major is mechanical engineering and I am considering completing a minor in mathematics. I chose to study mechanical engineering as I am fascinated with how we can apply math and science into real life and use it to advance as a society. I chose the University of New Mexico because of its location in Albuquerque, New Mexico. New Mexico has endless engineering opportunities like the Sandia and Los Alamos Labs, Intel, Raytheon, etc. This summer I am hoping to become an intern at the Sandia Laboratories as a computer coder. Thus far I have had a great college experience at the University of New Mexico. Within my first year I was involved with two engineering projects including creating a robotic eye using computer aided design (Solidworks) and machining a pendulum that launches a golf ball into a basket. I also joined the American Society of Mechanical Engineering (ASME) and worked on an electric bike for the e-Human Powered Vehicle Challenge. Unfortunately, this semester I was not able to join ASME due to a time conflict with a class, but I do plan to rejoin next semester and compete in the e-Human Powered Vehicle Challenge in the spring. This semester I am currently working as an SI Leader. An SI Leader is a supplemental instructor leader, as an SI Leader I tutor MATH 1512 or Calculus 1 for Professor Martinez. Moving forward I hope to have more involvement in engineering organizations and obtain an engineering internship. I also hope to have more class projects that relate to engineering. I am blessed to be an Onward scholar and receive the Onward scholarship, so I can gain these experiences while receiving a higher education. I am proud to represent the Onward foundation and I am looking forward to continuing my education because of Onward.



My name is Izabella Balfour, and I was born and raised in Cortez, Colorado. From a young age, I knew I wanted to go to college, but I was never quite sure how to get there. My parents had never gone to college, and the process of it seemed very daunting. Growing up, I thought about numerous careers I could go to college for, but when I was in 5th grade, I found my passion. After being diagnosed with Type One Diabetes, I found a love for the medical field, and wanted to give back by becoming a Nurse. I worked very hard throughout middle school and high school to get good grades and set myself up for a path to go to college. A big part of college is paying for college. I wanted to set myself up the best that I could to enjoy my experience, and I was lucky enough to get scholarships from the Onward! Foundation. This foundation allowed me to live out my dreams of being able to go to college and attend Colorado Mesa University in Grand Junction, Colorado to enter into their Nursing Program and get my Bachelors in Science and Nursing. My first semester of college has been wonderful! I love my classes, and have had so many great experiences. I also applied for the Nursing Program, and I was accepted into the program for the Spring Semester! I am grateful for the Onward! Foundation for giving me the chance to attend college.



Leadership Montezuma

Almost a COVID casualty

Leadership Montezuma has a long and storied history for over 20 years in Montezuma County. The program has educated hundreds of individuals from the community including young entrepreneurs, up and coming local political leaders and businesspeople as well as seasoned professionals in the machinations of everyday life in Montezuma County. All told there have been 24- 2-year cohorts with over 352 graduates. The program ran consistently for many years before a global health crisis put the program on hold indefinitely. In the spring of 2020, the Leadership Montezuma cohort was forced to suspend its mission of community education.

The relaunch

In May of 2022, a small group of community leaders met to discuss the availability of leadership development/training opportunities accessible to the public and private sectors in our community. It quickly became apparent that the community missed and needed the important work of Leadership Montezuma. The result of that initial meeting and a community listening session led to the formation of the Montezuma Leadership Network which now is made of three distinct pillars- Education, Networking and the aforementioned- Leadership Montezuma. The planning group quickly decided to relaunch Leadership Montezuma beginning in the fall of 2023.



Outreach and Recruitment

The first task was to gauge whether or not the community felt that there was a need for a Leadership Montezuma reboot. The planning group reached out to hundreds of previous attendees and the organizations they were associated with and the resounding answer to the question was - YES! In the spring of 2023, the LM planning committee and the Program Manager, Vanessa Malloy advertised the 2023 -2024 Leadership Montezuma reboot to the community in general as well as past participants including local non-profits, government, and business entities. The response was incredible. The organization hoped for and expected about 20 applicants and was pleasantly surprised when around 25 people applied to be a part of the program.

Continuing the legacy

In August of 2023, the new Leadership Montezuma cohort held its traditional retreat and orientation outside of Mancos at the Harmony Barn. Since then, the cohort has participated in three days of education in the realms of Arts and Culture, Health and Human Services and Local Governance. The remaining sessions include deep dives into topics such as Education, Natural Resources and Agriculture and a visit to the Ute Mountain Ute tribe. All told the group will have 9 themed learning opportunities from September 2023 to May of 2024. The cohort is an extremely enthusiastic group of individuals who represent various sectors of the community such as healthcare, nonprofit organizations, city and county government, private individuals and more. The future of the Leadership Montezuma program is bright. The hope is to continue the legacy that was begun many years ago. With the energy and enthusiasm of the 2023-2024 cohort, the program has inevitably gained its status as a community institution.



Financial overview

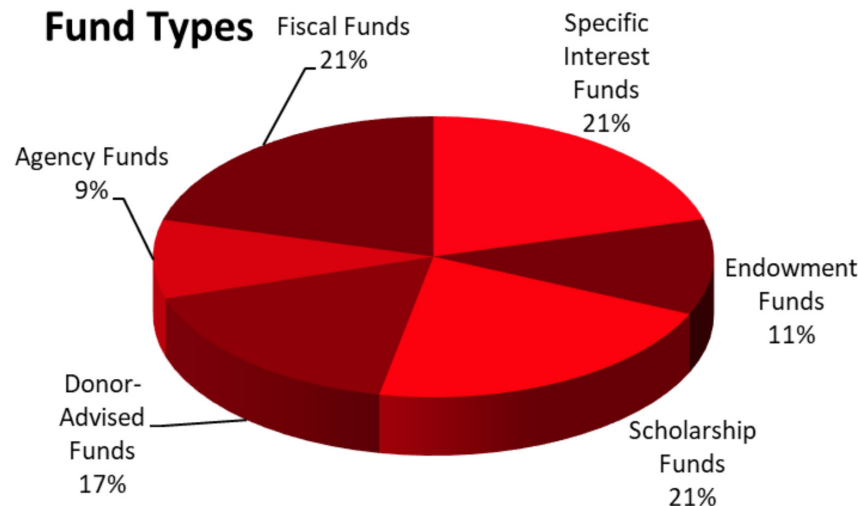
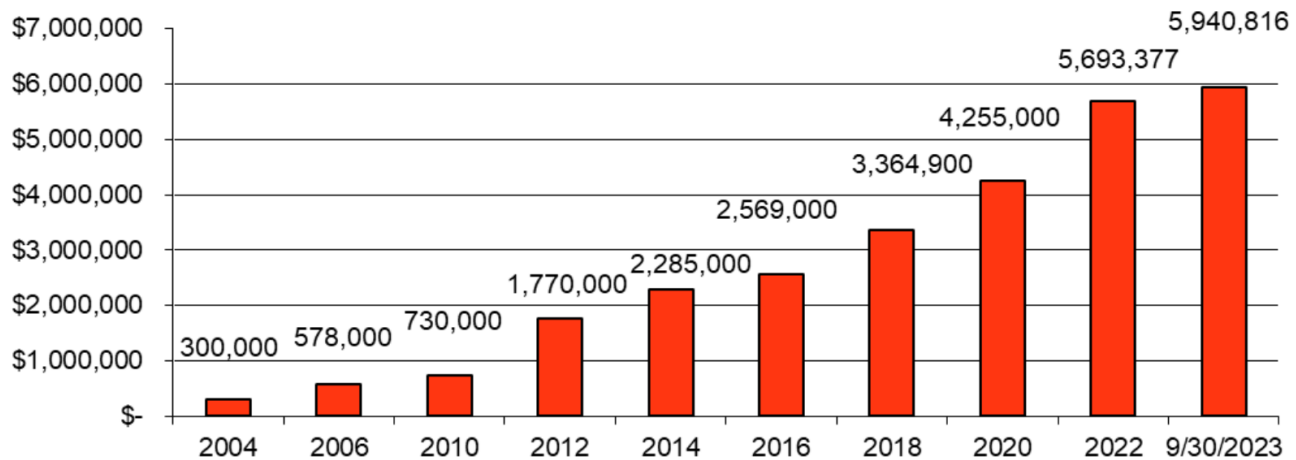
Statements of Financial Position

	12/31/2022	9/30/2023
Assets		
Cash	\$ 928,925	\$ 758,604
Current assets	356,388	160,405
Fixed assets, net	1,052,641	1,052,641
Investments	3,355,423	3,969,166
Total assets	\$ 5,693,377	\$ 5,940,816
Liabilities		
Current liabilities	\$ 161,696	\$ 93,969
Agency funds	413,887	439,058
Total liabilities	575,583	533,027
Net assets	5,117,794	5,407,789
Total liabilities and net assets	\$ 5,693,377	\$ 5,940,816

Statements of Activities

	Year Ended 12/31/2022	Nine Months Ending 9/30/2023
Support and revenue		
Contributions	\$ 411,762	\$ 194,678
Fundraising	58,606	47,387
Grants	2,774,178	2,079,331
Investment earnings (loss)	(575,230)	567,151
Management fees	163,673	100,813
Program fees	134,003	146,508
Total support and revenue	2,966,992	3,135,868
Expenditures		
Fundraising	11,541	13,649
Grants	296,503	708,427
Payroll/Contract Services	1,405,753	1,315,234
Programs/Scholarships	600,551	609,828
Support services	270,772	198,735
Total expenditures	2,585,120	2,845,873
Increase in net assets	\$ 381,872	\$ 289,995

Year-End Total Assets Since Inception



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

What's Your Legacy?