



# REPORT TO THE COMMUNITY



## Community Support Growing Strong

Foundation Reports Growth, High Operational Standards; Announces New Priorities

The Community Foundation Serving Boulder County announced today that the foundation is growing and going strong—and appealed to the community to invest and help build a permanent resource for those in need.

The Community Foundation reported the following highlights from the past year:

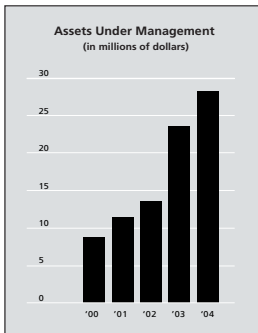
- **The foundation finished 2004 with over \$27 million dollars in assets** under management (this includes both Donor Advised Funds as well as broader funds, such as the Community Trust and the Millennium Trust). These assets are a significant and growing savings account for the benefit of the community.
- **The Community Foundation Serving Boulder County became one of the first community foundations in the country**

**to comply with the Council on Foundation's National Standards certification.** This extensive process demonstrates that The Community Foundation Serving Boulder County is using the industry's standards of best practices, and is operating with integrity and transparency.

- **During 2004, the foundation distributed almost \$3.9 million dollars in grants to non-profit organizations.** Those grants have helped to build—and rebuild—communities. Here at home, those grant dollars have supported shelters for people and pets, have enriched our children's educations, and have educated people about the environment. The money has purchased art supplies, let people dance and paint, provided opportunities for at-risk and off-track youth, and given a helping hand to those in the community who

have sought it. (For a complete list of grants, please visit the foundation's website at [www.commfound.org](http://www.commfound.org).)

- **Since inception, a total of nearly \$14 million has been granted by the foundation** in support of community organizations doing good work.
- **The Community Foundation helped local residents respond—in an effective and leveraged way—to the heartbreak and suffering caused by Hurricane Katrina.**
- **Today, the foundation has 150 Donor Advised Funds, which comprise 75 percent of its assets.** The foundation's staff works extensively and personally with these donors and their families to help them give with impact and to incorporate strategy and expertise into their philanthropy.



### 5 ways to think about a community foundation

Think of us as a catalyst: we spark lots of ideas in the community.



Think of us as a watering can: we help philanthropy grow through time.

Think of us as a heart: we help donors connect with the community.



Think of us as an umbrella: we are a savings account for a rainy day.

Think of us as a bank: we invest your funds wisely for the long run.



The Community Foundation Serving Boulder County exists to improve the quality of life in Boulder County and to encourage an ethic of philanthropy. We make grants to community organizations and manage a variety of funds established by individuals, families, and corporations. We're here to help our donors do good work. For good. Forever.

#### Letter from the President

### Investing in the Things We Treasure

Many Boulder County residents are investors in this community. You are donors, staff members, advisors, and volunteers with the Boulder County organizations that make a tangible difference in the lives of people every day. The Community Foundation Serving Boulder County salutes and honors you for the work you do.

We believe that investing in this community is the best and only way to keep our quality of life, to ensure that the natural beauty of our home, the creativity and entrepreneurial spirit of our people, and the energy and accomplishments of our children are preserved and celebrated. The Community Foundation is a leader in that mission, not only in supporting community organizations that work to help build quality, but also a leader in leveraging resources and bringing time, treasure and talent to the table.

We invite you all to learn more about The Community Foundation, what we've done in the past months, and the ways in which we invest in this community every day.

Josie Heath, President  
The Community Foundation  
Serving Boulder County

- **The Community Foundation's donors, volunteers, trustees, and sponsors have made success possible.** Together they have invested and will continue to invest in Boulder County.

"This is great progress, and gives us much to celebrate. But we also know that with the resources in this county, and the emerging needs that we see, this foundation can grow, can do more," said Josie Heath, President.

The foundation also announced that its next phase of growth will focus on growing the Community Trust. This is the foundation's most flexible fund—an unrestricted permanent fund that allows the foundation to respond to the community's most pressing needs, now and in the future.

"The Community Trust is a savings account for the entire community, for lean times as well as good times. A gift to the Community Trust is perhaps the most generous kind of gift. Not only does it enable dollars to go where they will have the most impact and where the need is the greatest, but because it is an endowed fund, it

can build over time to provide the kind of help any community needs to thrive," Heath said.

Money from the Community Trust is distributed through a competitive grants process and is never used for either religious or political funding.

"The Community Foundation will be here for good, forever—growing your money over time to serve the community's changing needs," Heath said.

#### High Impact Millennium Trust Grants Announced

Total amount awarded surpasses \$305,000... Page 2

#### Nova Awards Honor Community Stars

Nonprofit groups recognized at annual awards luncheon... Page 2

#### Philanthropists Follow their Passion

Donor Advised Funds support community interests... Page 3

#### Hurricane Relief Efforts Connect Local Donors

Innovative solutions allow for smart giving... Page 4

# NOVA Awards Honor Shining Community Stars

A nova, in the universe, is a star that suddenly increases in brightness. The Community Foundation presents its NOVA Awards to nonprofit groups—our community stars—that have demonstrated an exceptional burst of brilliance, innovation and entrepreneurship. Here are the 2005 winners, all examples of stars in our community.

## ARTS:

**Rocky Mountain Center for Musical Arts, "Heartstrings Program"**

The Heartstrings Program provides need-based tuition assistance and musical instruments to any student in need of support to participate in a Rocky Mountain Center for Musical Arts' program. Over 200 instruments are available for rent at low or no cost to the student, and since 1996 more than \$70,000 has been distributed in tuition assistance.

## CIVIC PARTNERSHIP:

**Boulder County Retired Seniors Volunteer Program (RSVP) & Albertson's Grocery Stores, "Carry Out Caravan"**

At Albertson's grocery stores all over Boulder County, RSVP volunteers take phoned grocery orders from homebound seniors and people with disabilities. One morning each week, volunteers shop and then deliver

the groceries. In 2004, there were 1,788 deliveries to over 303 clients, bringing supplies and companionship to those who are at home.

## EDUCATION: Impact on Education, "Boulder on Board"

Boulder on Board is a Monopoly-type real estate trading game featuring Boulder's own businesses and attractions, which has yielded over \$100,000 for Impact on Education's Opportunity Fund. This fund ensures that all students in the Boulder Valley School District are able

to attend field trips, access academics, and participate in extracurricular activities. Since its creation in June 2004, the fund has benefited over 1,000 students from low-income homes.

## ENVIRONMENT: Eco-Cycle & Boulder Farmers' Market, "Zero Waste Farmers' Market"

The Zero Waste Farmers' Market is a model of business cooperation that also makes good environmental sense. Eco-Cycle meets with each vendor at the Boulder Farmers'

Market to help them to find compost-ready alternatives for the items that previously generated trash, such as plates, bowls, cups, straws, and lids. The Boulder Farmers' Market is the first community market to become a Zero Waste model.

## HEALTH & HUMAN SERVICES: Community Food Share, "Feeding Families"

This direct distribution program began in March 2004 as a way to increase access to food by working families in Boulder County who may still be living in poverty. Low-income clients of several local nonprofit groups who attend monthly parent meetings and volunteer in their respective programs, receive food once a month at no charge from the Community Food Share warehouse. Approximately 50 families shop each Thursday; in 2004, 262,378 pounds of nutritious food were distributed.

## Stan Black and Pat on the Back Awards

Each year, The Community Foundation gives out two awards to individuals who have shown dedication and brilliance in their community service. The first is the Stan Black Award, named after one of the foundation's founding trustees, and given to an individual who has given a lifetime of "time, treasure and talent" toward producing positive change in our community. The second award is called the Pat on the Back Award. This recognizes an individual who has given extraordinary, but often unsung, volunteer time caring for the community. It is named after just such a person, Pat Shoemaker, a "pink lady" volunteer for Boulder Community Hospital for 28 years.



This year's Stan Black Award winner, Doris Hass (left), and this year's Pat on the Back Award winner, Marilyn Tiedtke (right).

### This year's Stan Black Award winner is Doris Hass

Doris has touched many lives in Boulder County and beyond through what she calls her "compulsive volunteering." In the 45 years she has lived in Boulder, many organizations have benefited from her time and attention, including the Boulder Public Library Foundation, the American Association of University Women, and the Boulder Seniors Foundation. Doris' energy and leadership is currently focused on the Boulder County Latina Women's League and Global Response, both groups where she serves as a board member.

### This year's Pat on the Back Award winner is Marilyn Tiedtke

Marilyn volunteers six days a week, dividing her time between RSVP and the Humane Society. She shops and delivers groceries to homebound seniors, provides car rides and companionship to the isolated elderly, works at the Gift Shop and Training Center at the Humane Society, and answers phones and provides clerical assistance to the RSVP office.



The Nova Award—given to nonprofit groups that have demonstrated an exceptional burst of brilliance, innovation and entrepreneurship.

# 6 Years of Millennium Trust: More High-Impact Grants



TOTAL MILLENNIUM TRUST AMOUNT AWARDED: \$305,625 TOTAL MILLENNIUM TRUST GRANTS AWARDED: 62

Many of you were visionary donors to a special fund of The Community Foundation: the Millennium Trust. The idea, launched in 1999 was simple: ask everyone to donate one hour of income—in fact, their last hour from 1999—into a fund for the new millennium and the future of Boulder County. Thank you to those of you who contributed to that fund.

Every year, about 20 people are selected randomly from the pool of Millennium Trust contributors to serve on the Millennium Trust Advisory Committee. This committee recommends what our funding focus will be, which organizations get grants, and how much money each group should receive.

In 2005, the Millennium Trust Advisory Committee decided to address projects that serve youth with an emphasis on engaging and addressing a sense of community and personal growth. Specifically, the committee sought to fund projects that build positive pathways with and for the youth community by raising the potential of individuals and organizations, especially those that are innovative, cross-cultural and cross-generational.

With the \$83,000 awarded this year, the Millennium Trust has given out more than a third of

a million dollars, which is something this community can celebrate. And this fund, as well as The Community Trust and other endowed funds at the foundation, will keep on giving.



The Millennium Trust funded 22 deserving community organizations in 2005.

## 2005 Millennium Trust Recipients

<b>Attention Homes</b> Volunteer and Mentorship Program	<b>CU Museum of Natural History</b> Girls At the Museum Exploring Science (GAMES)	<b>Kids' Park Lafayette</b> Phase II "Lunchtime" A Documentary Film	<b>United Black Women of Boulder County</b> Institute for African American Leadership
<b>Boulder County 4-H</b> 4-H Community Mapping Team	<b>CU Science Discovery</b> Science is Everywhere	<b>Safe Shelter of St. Vrain Valley</b> Domestic Violence Community & Peer Education	<b>Volunteer Connection</b> Mentors Matter
<b>Boulder Judo Training Center</b> Aim Higher Program	<b>Family Learning Center</b> Ignite Your Potential Youth Development Program	<b>Safehouse Progressive Alliance for Nonviolence</b> Moving to End Sexual Assault Peers Building Justice Program	<b>Whittier International Elementary School</b> Butterfly Garden
<b>Boulder Parks and Recreation</b> Foundation Youth Service Initiative	<b>Growing Gardens of Boulder County</b> Cultural Youth Project	<b>Women's Health</b> Sexual Health and AIDS Awareness Peer Education Program (SHAPE)	<b>Women's Wilderness Institute</b> Girls' Wilderness Program
<b>Colorado Shakespeare Festival</b> Camp Shakespeare	<b>HospiceCare of Boulder and Broomfield Counties</b> Healing Circles	<b>Thorne Ecological Institute</b> Enhancing Family Services	
<b>Compass House</b> Boulder Creek Festival Teen Area	<b>Imagine!</b> Stepping Stones		

# Why Give through a Community Foundation?

## Our Donors Share their Perspective

This question is one the foundation fields from many—if not all—potential donors. For many, the financial piece is simplified by working through the foundation: make one gift, cash, stock or a different asset, to the foundation and then recommend multiple grants to be distributed. For some, the foundation provides a level of expertise on high-impact opportunities in the community that donors value. For others, the foundation is the simplest and most cost-effective way to be a philanthropist. The foundation asked some of its own donors why they do give through the foundation, and here is what they have to say.

### Brad Feld and Amy Batchelor The Anchor Point Fund

Amy is an author, musician and art connoisseur, as well as a community volunteer. Brad is the Managing Director of Mobius Venture Capital.

These days, they are both active and generous philanthropists. When they first made the acquaintance of The Community Foundation, however, they were new to—and intensely private about—their giving.

"The staff and leadership of The Community Foundation educated us about the Boulder County community and about philanthropy in general since we were new to both. In addition, The Community Foundation helped us

give anonymously until we felt ready to publicly support those organizations we had come to know. The foundation has helped us refine our philanthropic vision," Amy said.

Over time, Amy and Brad have given a lot of love—financial as well as treasured expertise—to many local organizations. They have gotten involved deeply with many local groups, and over time, their vision of how best to support this community has evolved. They still support and remain involved with many local organizations, but they have also made a long-term investment in our community, through the foundation's Community Trust. This fund is the foundation's most flexible and responsive permanent fund.



Brad Feld and Amy Batchelor

### George and Caroline Thompson The George and Caroline Thompson Gift Fund

When George, a certified public accountant, and Caroline, an artist, moved to Boulder a couple years ago, they wanted to connect with the community immediately. They were familiar with the concept of community foundations and had been involved with one in Memphis, where they lived before Boulder.

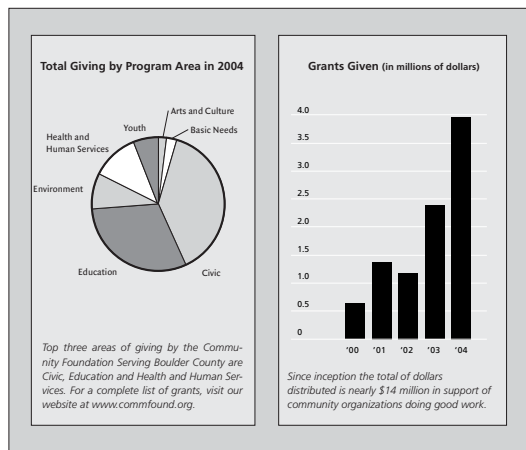
"We had been involved with community foundations in several cities where we lived and strongly believe an active community foundation is one of the great inner strengths of a community," George said. "We contacted the foundation when we moved here. What a great way to meet good people and get involved."

As a CPA, George says he can see it as a

wonderful tax planning resource, allowing a tax deduction in one year, but allowing disbursements to charities in future years based on the recommendations of the donor.



George and Caroline Thompson



### Mike and Wilma Ormsbee The Ormsbee Family Fund

"I first heard about the guy who started the I Have A Dream Foundation on 60 Minutes, and I always thought that was a neat thing. But until we had any money, we couldn't even think about it," Mike said.

Then the Ormsbees had the good fortune to have some stock options pay off. Longtime area residents—Wilma's family moved to the Lafayette area in 1943; prior to that, her father homesteaded and ranched north of Sterling—they came to The Community Foundation for some help in getting a fund started so that they could concentrate on their interests in the community.

"The Community Foundation is like Consumer Reports. They do the research on the non-profits out there and handle all the administration, which allows us to volunteer our time for the things we care about. Otherwise we wouldn't be able to do both," Mike said.

And they made a ten-year commitment to some local children that requires a lot of volunteering. With a partner, the Ormsbees adopted a class of second graders through the I Have A Dream program, promising the children and their



Mike and Wilma Ormsbee

families to help them not only pay for college, but also to get there.

"They are sixth graders now. Wilma tutors, I try to stay in touch with them and help in other ways," Mike said.

The Ormsbees use their fund at The Community Foundation to address community issues they care about, including other programs that help children and education.

They have also made their giving something the whole family does together. Each year around the holidays, as a family, the Ormsbees define their annual giving priorities and make gifts from their fund.

"We think of this as a family venture," Wilma said.

### Pat and Greg Calhoun The Calhoun Family Fund

When Pat and Greg Calhoun were just starting out, they had plenty of creativity, ambition and entrepreneurial spirit. What they didn't have was a big paycheck.

Greg was in school, finishing his education, while Pat was one of the founders of a tiny, start-up called White Wave.

"We had no money, basically," Greg said. "For a few years, we were depending on Pat's income from White Wave, which wasn't much. Back then the whole company was only two or three people. She made enough to cover rent and a few necessities and nothing else."

At the same time, the Calhouns were starting a family. Like many small business employees and young adults, they had no health insurance.

The couple went to People's Clinic, one of Boulder's community health centers, early on for prenatal care. Later, the couple split their visits between the clinic and their own doctor, seeing him on the occasions when they felt they could afford it. For the deliveries of their first two children, the hospital allowed them to go on a payment plan.

"The community had support facilities for people like us who weren't in a position to do things in a first class way," Greg said.

Things are different now. Pat, along with co-founder Steve Demos, sold White Wave to Dean Foods in 2002. In 2005 Pat left her position as CFO of the company whose products include Silk Soy Milk and Horizon Organic Dairy products.

Greg likens his family's experience to a tree, starting small and then growing.

"The community was there for us early on in our careers—and that supported this business to

grow. When we were very young, the community provided nourishment. Now the trees have ripened, and we're able to pick that fruit and use it to help others," Greg said.

**"The community was there for us early in our careers. When we were very young, the community provided nourishment. Now the trees have ripened, and we're able to pick that fruit and use it to help others."**

-Greg Calhoun

Greg and Pat are pleased to make a grant out of their fund this year back to the People's Clinic.

"It is in recognition—and really in gratitude—for the times they supported us," Greg said.

# The Community Foundation Connects Locals to Hurricane Relief Efforts

Like other communities around the world, Boulder County stepped up to provide assistance to the Gulf Coast Region after Hurricanes Katrina and Rita. There are several ways The Community Foundation has helped Boulder County do smart philanthropy for hurricane relief.

- Oreck Corporation, a New Orleans-based vacuum cleaner manufacturer with local ties, opened a Donor Advised Fund, which, to date, has gathered \$832,240. The fund will remain open into the holiday season, and then the money will be sent to Baton Rouge Area Foundation for distribution in support of the many Oreck employees affected by the storms.
  - The Community Foundation endorsed Bead Aid—a colorful local fundraiser which has raised \$4,000 to benefit the American Red Cross.
  - ICAT opened a Donor Advised Fund which raised \$30,000 for the American Red Cross through contributions by ICAT employees.
  - The Community Foundation sold a donated suite for a Broncos game for \$7,000 and will grant that money to a community foundation on the Gulf Coast, along with \$6,355, to be used for long-term restoration efforts.
- By partnering with other community foundations who are experts about their own communities, The Community Foundation Serving Boulder County can ensure that donations from afar will be put to specific and meaningful use.

## New Report Highlights Emerging Trends, Demographics in Boulder County

### What's new in Boulder County?

Well, about two-thirds of the residents, for one thing. A new report from the Boulder County Civic Forum, a program of The Community Foundation Serving Boulder County, indicates that two-thirds of people living in the county today did not reside here ten years ago; one third arrived in the past five years. In addition, about 10



Contact The Community Foundation to request your copy of the Community Indicators Report.

percent of the County's population moves in and out of the county annually. The average length people stay in their homes is less than four years. And 10 percent of those living here were born outside the United States.

That statistic is one of many that make up a snapshot of Boulder County and is included as the part of the Boulder County Indicators Report 2005. It is published biennially by the Boulder County Civic Forum, a group that exists to promote healthy decision making that will sustain the environmental quality, livability, and economic vibrancy of the Boulder County region.

Specifically, the report analyzes five trends, comparing data with that in previous reports.

### Trend 1: Declining Middle Class

Although the overall economy of Boulder County is strong, the number of families in the lowest income group has increased since 2001. During that same period, the number of families earning more than \$100,000 also increased.

### Trend 2: Housing Costs

Prices for single family homes in Boulder County are continuing to rise. Since 2000, single family home prices increased 40 percent in Superior and Boulder and 10 percent in Longmont.

### Trend 3: Commuting and Traffic

More people work in Boulder County than live here. Thirty percent (or 49,100 people) of those who work here commute from another county; while 30,500 County residents commute to work outside the county.

### Trend 4: Access to and Disparities in Health Care

Ninety percent of Boulder County residents have health care through private insurance or government programs, but there are disparities. Many groups such as Latinos, low wage workers, small business workers, seniors and young adults do not have reliable health insurance coverage.

### Trend 5: Youth Risks and Behaviors

Boulder County is home to 15,000 young people between 14 and 18 years old, with three-quarters of kids under 18 living with either both parents, or their single parent working.

# Culture of Giving: Pass it on!

Tis' almost the season for little yellow balls to be bouncing around Boulder County. The Community Foundation rolls out the balls this time of year to remind us all to give to our local nonprofit organizations.

The Culture of Giving movement was established to bring focus to Boulder County's giving habits during our annual Culture of Giving Week, which will be December 4-10, 2005.

Why all the little yellow balls? Evidence suggests that citizens in Boulder County don't give as much on average as they could, or as their demographic equivalents in other places. This gap is concerning, because despite common misconceptions that Boulder County doesn't have needs, people here really do. A few examples:

- It's no surprise that Boulder County is an expensive place to live. In fact, statistics show that a family of one adult and two children need \$52,919 to live in Boulder County. Yet 20 percent of Boulder County's households earned less than \$25,000 last year.
- In 2004 Community Food Share distributed 3.3 million pounds of food, which is a huge quantity – but not even close to the 5 million pounds of food that they need to meet the needs of this community.
- 16 percent of kids in Boulder County aged 14-18 have attempted suicide, which is higher than both state and national averages.
- Despite a highly educated community, violence is still a problem. In 2004, Safe-house Progressive Alliance for Nonviolence served 278 people in its shelter, 1,191 clients through outreach services, and 859 clients through advocacy programs.



- Half the single family homes in Boulder are affordable only to families earning the top 20 percent of income.
- 36 percent or 44,000 Boulder County households have incomes low enough to qualify for federal housing programs; 10.3 percent of households are at or below poverty level.

In addition to these problems of housing and hunger, our county's residents have additional issues related to health care and the well being of our youth. (For more information, see Quality of Life in Boulder County: 2005 Community Indicators Report at [www.boccivicforum.org](http://www.boccivicforum.org))

And beyond these basic needs, the recreational and cultural programs that make our communities educational, interesting, and vibrant places to live and do business are also at stake.

The services and initiatives that address our quality of life are most often provided by local nonprofit organizations. Even with some government funding, Boulder County nonprofit organizations can't sustain these worthy programs without the financial and volunteer support of local citizens.

From Thanksgiving until the end of the year, you will see reminders from the Culture of Giving all around you – in local media, at community events, in area schools, and at your favorite businesses. Take the reminder: give, and then pass the idea onto others. It's easy. Visit [www.cultureofgiving.org](http://www.cultureofgiving.org) to learn about nearly 400 local organizations and give online, or look for envelopes in the Daily Camera beginning the day after Thanksgiving. You may give directly to an organization of your choice or give through The Community Foundation to organizations that are Boulder County's greatest needs.

The Culture of Giving is a movement created by the efforts of dedicated volunteers. Join them to celebrate Boulder County's emerging culture of giving and the Culture of Giving Youth Art Contest Awards at the Dairy Center for the Arts on Wednesday, December 7th from 5:30-7 pm.

## Community Encouraged to Put Foundation in Estate Plans



The Community Foundation has a Legacy Society. It is a simple program: anyone who puts The Community Foundation in his or her will belongs. There is no better way to assure that the

things you love will continue for other generations. By informing the foundation of your gift and becoming a member of the Legacy Society, you give us the opportunity to recognize you and celebrate your generosity during your lifetime. Information about becoming a member is on our website, [www.commfund.org](http://www.commfund.org).

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 Serving Boulder County