



THE COLORADO TRUST **2002**  
Annual Report

**THE COLORADO TRUST**  
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**COVER:** Maria and Genesis Esquivel, *Supporting Immigrant and Refugee Families Initiative, Focus Points Family Center*

**PAGE 2:** Jean C. Jones and John R. Moran, Jr.

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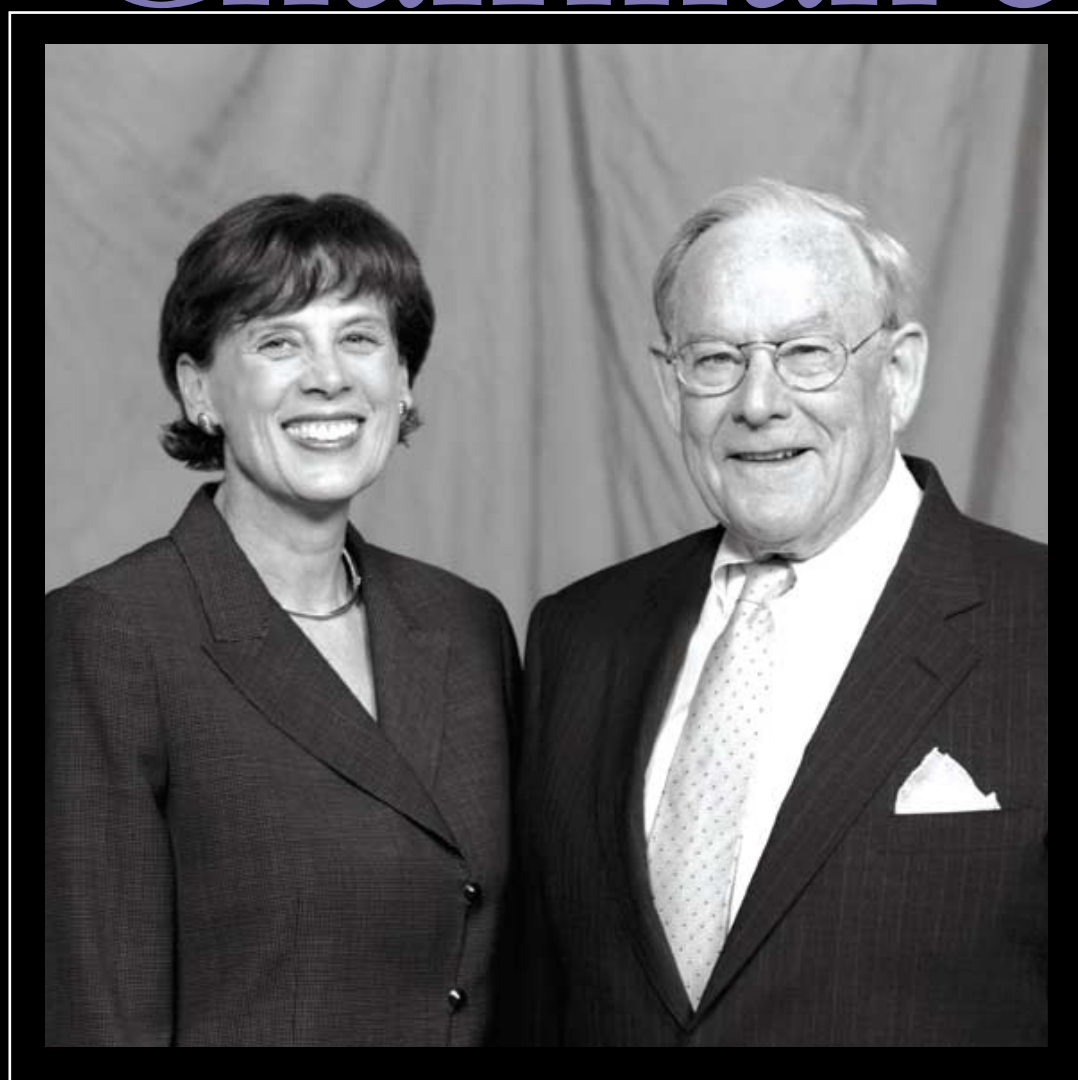
# Our Mission

TO ADVANCE THE HEALTH AND WELL-BEING OF THE PEOPLE OF COLORADO

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# Letter from the Chairman & Pre

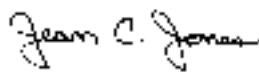


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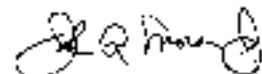
The Colorado Trust has a history of providing long-term, flexible support to grantees to maximize their ability to bring about change. Within today's challenging environment, the Board of Trustees has expressed its intent to maintain the long-term grant commitments that have been made to existing Trust initiatives. Collectively, these commitments extend through 2007 and total more than \$27 million. However, even as our grantmaking increased last year – from \$15.4 million in 2001 to \$16.5 million in 2002 – we currently have fewer resources from which to make grants because of the decline in the capital markets. Though this likely means we can provide less money for new initiatives over the next year, The Trust will continue its efforts to convene people, form alliances, provide information and work together with others in the community to influence leaders and work to bring about change and improvement.

One such convening that is being planned for summer 2003 is the Partners in Leadership conference. Designed for grantees and partners in Trust initiatives from across the state, this conference will offer an intensive look at how to improve leadership ability which, in turn, will help grantees sustain their organizations and strengthen the impact of their efforts. Additionally, in 2002, three noteworthy alliances occurred that served to increase the impact of The Trust's efforts. The Trust joined with the Caring for Colorado Foundation and Rose Community Foundation in a collaborative venture to create the Colorado Health Institute, an independent, impartial nonprofit organization designed to serve as the state's leading center for health data resources. In analyzing and communicating this data to key policymakers and providers, we believe the Institute has an unprecedented opportunity to address the state's health care needs. We also joined with seven other Colorado foundations in the Mental Health Funders Collaborative. This group has commissioned a study – to be completed in 2003 – to provide funders with a much-needed comprehensive understanding of the mental health care needs within the state. And, we partnered with Governor Owens and Attorney General Salazar to extend the reach of our study, *Youth and Violence: Students Speak Out for a More Civil Society*, on how to help prevent youth violence and encourage positive youth development. Together, they shared the compelling findings of this study with their fellow governors and attorneys general across the country.

The work we do and the people we are privileged to work with provide many rewards. It was a tremendous honor to be recognized in 2002 for our efforts by our colleagues on National Philanthropy Day. In large part, the Outstanding Foundation award presented to The Colorado Trust is a tribute to the efforts of Trust grantees – people from grassroots and community groups to well-established larger nonprofit organizations across the state providing much-needed services. Our thanks to each of our partners for their efforts to advance the health and well-being of the people of Colorado.



**JEAN C. JONES**  
*2002 Chairman of the Board*



**JOHN R. MORAN, JR.**  
*President & CEO*

ADVANCING THE HEALTH & WELL-BEING OF

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THE COLORADO TRUST • 2002 ANNUAL REPORT

## ABOUT THE COLORADO TRUST

*The Colorado Trust was established in 1985 and endowed with \$191 million from the proceeds of the sale of PSL Healthcare Corporation. Since that time, The Trust has made grants totaling more than its original endowment. Trust grants, which have been made to organizations in every Colorado county, have helped these organizations to address and improve tough social problems, such as reducing suicide, improving immunization rates, reducing youth violence and providing accessible, affordable health care.*

*Today The Trust remains firmly committed to grantmaking efforts that advance the health and well-being of the people of Colorado. Trust initiatives address six areas:*

- Promoting health and preventing disease
- Strengthening the delivery of health care services
- Addressing the needs of the medically underserved
- Addressing the needs of children and youth
- Advancing quality mental health care
- Serving the aging.

*One of the few Colorado foundations that makes grants strictly through initiatives, The Colorado Trust offers grantees flexible, long-term support. Initiatives are developed based on the examination of trends and data, advice from experts in the field and input from community members who know what's needed for success in their hometowns. Once initiatives have been approved by the board of trustees, The Trust announces new funding opportunities to people in communities across the state.*

*Independent evaluations are conducted for virtually every Trust initiative. Findings from these evaluations help The Trust and its grantees make positive adjustments to programs and services offered, and shape future initiatives of the foundation.*

*The Trust also is committed to sharing information about what is learned through each initiative. In-depth information about Trust initiatives, associated evaluations and new funding opportunities are shared through community forums hosted by The Trust throughout the year, numerous publications and via the website – [www.coloradotrust.org](http://www.coloradotrust.org).*

“Grantees have expressed to us an appreciation for the initiative style of grantmaking used by The Colorado Trust. Initiatives require a systematic process to learn about issues, potential solutions, individuals and organizations. They serve as a catalyst for bringing people and organizations together in communities and for linking statewide or regional agencies. And they provide for a length and depth of commitment appropriate to address major social issues. We also have learned through focus groups conducted on behalf of The Trust that while initiative-based grantmaking does not answer all the needs of Colorado or match the specific needs of all Colorado’s nonprofit organizations, it does serve a significant role in the state.”

**JEAN MERRICK**

*Senior Vice President of The Colorado Trust*

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# Accessible & Affor





# able Health Care

“In 2001, the Health District of Northern Larimer County conducted a Community Health Survey which indicated that there’s a need for community education and programs about the importance of physical activity. The survey showed that almost 64% of adults in our area either don’t get sufficient exercise or are totally inactive. With a grant from The Trust’s Colorado Healthy People 2010 Initiative, we launched Health District on the Move, which is designed to help people increase their physical activity. Participants – who are enrolled through participating worksites – track their steps for 15 weeks and increase their steps by 20% each week. And each week, I send the site coordinators e-mails to forward on to participants containing healthy lifestyle tips about increasing the number of steps taken, reducing stress and improving overall healthy living, and we include a healthy recipe. Three months in, we have 539 participants, and that’s from just 15 organizations. Over the three-year period of the initiative, we’re going to get 250 organizations and 10,000 participants.”

**KATHY SCHLEPP**

*Community Projects Coordinator  
Health District of Northern Larimer County*

## INITIATIVES

### COLORADO HEALTHY PEOPLE 2010

*Modeled after the national Healthy People 2010 effort, this initiative provides support for 43 community organizations across the state to help Coloradans learn about and take steps to lead healthier, longer lives. Grantees are focusing their efforts on obesity prevention/increased physical activity, access to health care, diabetes prevention, injury prevention, substance abuse prevention and mental health care. Five regional coordinating agencies oversee and manage the work of the community organizations carrying out the work of this initiative.*

### COLORADO IMMUNIZATION

*The Trust supports two immunization efforts – one for children and the other for minority adults. The Colorado Children’s Immunization Coalition is working to significantly improve – to at least 90% – the rates of Colorado kids who are fully immunized against infectious diseases. In addition to increasing broad-based public awareness and providing public policy information, the coalition provides resources to Colorado communities and providers to help improve the delivery of their immunization services and is working to develop and implement a statewide patient registry. Additionally, the Visiting Nurse Association is receiving Trust support to vaccinate more Denver-area adult minorities against influenza and pneumonia. The VNA also is working to increase the number of health screenings, health education classes and health information offered to adults in minority communities.*



# Accessible & Affo

EIGHT

“The Colorado Rural Outreach Program (CROP) has been helpful to us in two ways: one, it’s hard for rural practices to offer compensation at the same rates that our urban counterparts are able to do; and two, being a privately held practice, we are not eligible for any federal or state repayment programs. We wrote our first CROP grant so we could assist an internal medicine physician, Dr. Joseph Flannery, with the repayment of student loans. He’s been very valuable to our staff – he’s a wonderful clinician. The CROP loan repayment program has really helped his satisfaction level and his ability to stay. The grant helped us be competitive in the marketplace and it’s a very valuable retention tool. Rural medicine is so difficult, because we just don’t have a choice about our payers. And here in the San Luis Valley, we have a significant proportion of uninsured and underinsured patients. In our practice, which has about 7,500 client visits each month, our patients are about 19% uninsured or underinsured on top of about 48% of Medicare or Medicaid patients. In a rural area, you’re going to work harder and you’re going to be less well-compensated. But you’re going to have a nicer quality of life and a better relationship with your patients.”

**GWEN HELLER**

*Chief Administrative Officer, San Luis Valley Medical PC*

# rdable Health Care

## INITIATIVES

### COLORADO HEALTH INSTITUTE

*Jointly developed by The Colorado Trust, Caring for Colorado Foundation and Rose Community Foundation and launched in 2002, the Colorado Health Institute is an independent nonprofit organization that is designed to serve as the state’s leading center for health data resources and analysis. The three foundations are providing core funding for the Institute during its start-up phase and for at least the first five years of its operations. The three foundations created the Institute based on a feasibility study that found there is currently no single, easily accessible, independent, impartial source of health information in the state.*

### COLORADO RURAL OUTREACH PROGRAM

*Administered by the Colorado Rural Health Center, the Colorado Rural Outreach Program is designed to recruit and retain adequate numbers of physicians in rural Colorado communities. The program offers numerous incentives to physicians such as education loan repayment, relocation assistance and temporary help so rural doctors have the flexibility to do such things as attend continuing education classes. The effort also assists communities with improvements of clinics or hospital facilities and the purchases of medical equipment.*

# Accessible & Affordable Health Care



TEN

“I’ve got 27 clients right now, and one of them is Vanessa. Her first baby is due at the end of June. Vanessa became a part of Best Babies because she says she doesn’t know anything about babies, and she wants to learn how to be a good mom. She and I are working together on how to have a healthy pregnancy. Vanessa used to weigh just 85 pounds, but together we studied the food guide pyramid and talked about how to eat healthy food to help the baby grow, and she’s gained 23 pounds. She always has lots of questions for me – Vanessa is open to learning and puts things into practice. Once her baby is born, I’ll visit her every week until the baby is two years old. We’ll talk about personal health, including how she can take care of herself, maternal life course, environmental safety and child development. I’ve noticed that because I’m a nurse, what I have to say is important to my clients. And, because Best Babies’ clients get so much information during the program, the clients then become a resource to their families and community. The moms become models of good parenting for the community. This program helps change their lives.”

**KATHLEEN FINLEY**

*RN, Nurse Family Partnership, Denver’s Best Babies*

## INITIATIVES

### COALITION FOR THE MEDICALLY UNDERSERVED

*The Coalition for the Medically Underserved – which includes more than 150 organizations and individuals – works with people across the state to improve access to affordable, quality health care for all Coloradans.*

### COLORADO CHILDREN’S CAMPAIGN

*Trust funding supports the Colorado Children’s Campaign in its efforts to improve the quality of life for children in Colorado. With an emphasis on children’s health, safety and education, the statewide nonprofit promotes the well-being of all children through research and public awareness.*

### COMMUNITY VOICES

*Administered by Denver Health, Community Voices works to improve access to health care services for Denver’s medically underserved people. Case workers help patients in the program to identify and remove barriers to good health, such as lack of understanding of the health care system, homelessness, inadequate resources, substance abuse or behavioral health problems.*

### DENVER’S BEST BABIES

*Offered at Denver Health, the Best Babies program strives to improve the birth outcomes, health and cognitive development of babies born to mothers in low-income Denver neighborhoods. Created by vote of the Denver City Council in 1999, the city provided significant support for the program until funding was eliminated in 2002. A partner in supporting this effort since 1999, The Trust continues to support Denver’s Best Babies program based on the promising findings of initial evaluation results.*

### FAMILY HEALTH CARE COLLABORATIVE

*In conjunction with the Robert Wood Johnson Foundation Local Funding Partners Program, The Trust provides support to the Marillac Clinic in Mesa County to integrate mental health and primary care for low-income people. Through this program, one of the first of its kind in the country, the Marillac Clinic helps patients increase their health-related quality of life, decrease untreated mental illnesses and emergency hospitalizations, and return to productive lives.*



# Strength

TWELVE

“My life has been full of problems, from personal to school. Assets not only helped me, but helped me help others. I had never heard about assets until I took a leadership class. At first the assets were just words on paper but soon they became part of my everyday life. Before this leadership class, I had less than 10 assets in my life. Now I have 28 – that’s a big improvement! One asset I lacked was a sense of purpose. Now, I know I want to be a nurse. I have my purpose. My life would be a mess if I hadn’t found out about the assets.”

**LILIANA CASTILLO**  
*Student, Kepner Middle School*

# en Families

“The assets framework has helped us at the Colorado Department of Public Health and Environment to be more effective in our work with youth. We developed a youth partnership and the youth came together to provide their perspective on adolescent issues. We really feel that we’ve actively engaged them. We’ve also asked the youth to participate on our grant review teams. They see it like it is and tell it like it is. Their involvement has resulted in better programs for the state.”

**MARY DAVIS**  
*Project Director, Interagency Prevention Services,  
 Colorado Department of Public Health and Environment*

## INITIATIVES

### ASSETS FOR COLORADO YOUTH

Building on a national research-based model, Assets for Colorado Youth (ACY) reaches out to young people – and the adults who work with and support youth – to help them build “assets” – common-sense values and experiences that help them grow up healthy, caring and responsible. ACY received five years of Trust support and today is an independent organization. Evaluation of the ACY initiative found that more than 600 Colorado organizations base their work on the 40 youth developmental assets.

### COLORADO HEALTHY STEPS

Begun by the Commonwealth Fund, Healthy Steps is a partnership with health care providers and funders at more than 20 sites across the nation. Funds from The Trust support three Healthy Steps programs, in Grand Junction, Westminster and Montrose. Together, these sites have provided more than 1,300 families with a comprehensive range of services designed to help parents foster the healthy growth and development of their young children.

### EDUCARE COLORADO

Educare Colorado is devoted to improving the quality of child care because the vast majority of children who spend time in care settings receive mediocre or poor care, even while research findings show that young children form 85% of their intellect, personality and social skills by age five. The Trust has committed seven years of funding to Educare to support their efforts to increase awareness of the importance of early childhood learning, offer training opportunities for care providers and develop a quality rating system for child care programs.

### HOME VISITATION/INVEST IN KIDS

The Nurse-Family Partnership improves the lives of mothers and their children through visits from nurses to low-income, first-time expectant mothers, starting as early as possible during pregnancy and continuing until the child’s second birthday. Based on 25 years of studies conducted by Dr. David Olds, program results have shown a 79% reduction in child abuse and neglect, an 83% increase in mothers’ workforce participation and a 69% decrease in arrests of the mothers who participated in the program. Invest in Kids, a nonprofit organization, has made the Nurse-Family Partnership available to more than 1,800 families in 49 Colorado counties.

# Strengthen Families



FOURTEEN



## INITIATIVES

### PREVENTING VIOLENCE

#### PREVENTING YOUTH HAND-GUN VIOLENCE

Through this five-year effort, The Trust provided support to the Center for the Study and Prevention of Violence (CSPV) at the University of Colorado at Boulder to conduct a study of youth handgun use in Colorado. The study found that over the last 20 years there has been a dramatic increase in murders by adolescents using handguns and that both adults and teens reported that guns are easily available. These findings led The Trust to support two pilot projects to integrate handgun violence prevention strategies into existing programs that work with young males up to the age of 19.

#### PROJECT EXILE

This statewide project aims to reduce the level of gun violence in Colorado through strict enforcement of existing gun laws. Local, state and federal law enforcement authorities have agreed to refer gun cases to the jurisdiction that can pursue the toughest penalties. Coupled with this strategy is a comprehensive public awareness campaign with the message that gun law violations will not be tolerated, and urging citizens to report illegal guns to authorities.

#### YOUTH AND VIOLENCE

The Trust partnered with the Families and Work Institute to conduct a study on what young people think can be done to stop the violence that affects them at home, at school and in the community. Findings from the study, Youth and Violence: Colorado Students Speak Out for a More Civil Society, show that the majority of young people (fifth through twelfth grades) say they experience some form of "emotional violence," or bullying. Almost half of young people say they experience physical violence. And children who have been harmed say they are much more likely to harm others. In July 2002, results of the national and Colorado studies were released at press conferences in Washington, D.C. and Denver, and called considerable attention to the problem of youth violence.

## SUPPORTING SCHOOLS

### AFTER-SCHOOL

Thirty-two after-school programs, serving children between fourth and ninth grades, receive support from The Trust to create efforts that promote positive youth development. Located in communities across Colorado, these programs include social and recreational skill-building, such as leadership development, mentoring, sports activities, academic support and development of computer skills.

### CASASTART

The National Center on Addiction and Substance Abuse at Columbia University (CASA) START program (Striving Together to Achieve Rewarding Tomorrows) is a neighborhood-based, school-centered effort that brings together schools, health and social service agencies and law enforcement to keep high-risk students, ages 8 to 13, drug- and violence-free. The Colorado Trust provides support for implementation of this program in Adams County School District 14. Each child in the program is assigned a case manager, who develops plans to help participants, offers counseling and coordinates services.

### GATES SMALL SCHOOLS

In conjunction with the national Bill and Melinda Gates Foundation's Small School Initiative, The Colorado Trust and other local funders are providing support to help restructure Denver's Manual High School into three small, separate schools. Research shows that low-income students perform better in small, highly focused and personalized schools. Also, students of smaller high schools tend to experience less student violence, suspensions and expulsions than those in larger high schools.

### SAFE COMMUNITIES-SAFE SCHOOLS

A joint effort of The Colorado Trust and the Center for the Study and Prevention of Violence at the University of Colorado at Boulder, this initiative helped schools and districts develop, and now put in place, safe school plans — from installing fences, fire alarms and emergency phone systems to redesigning playgrounds and offering alcohol and drug counseling. Additionally, all 1,500 Colorado schools are eligible to receive training to implement School Crime Stoppers, a program that provides students with a safe, anonymous system to report threats, fights, substance use and abuse, or other activities that create unsafe situations for young people.

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# Strengthen Families

SIXTEEN

“Under the Supporting Immigrant and Refugee Families Initiative (SIRFI), the Adult Education Center in Durango formed a coalition with four other nonprofits to provide services to immigrants in our area. The coalition is the only organization to provide mental health resources to immigrants in the region. Last year, the coalition worked with 779 immigrants, which is a sizable proportion of the immigrant population. At the Adult Education Center, we’re serving about 115 adults who are at various levels of English-language instruction. They represent 22 countries. The most common language spoken by our clients is Spanish, followed by Russian and Thai. One of our former English as a Second Language students, Celia, is from Mexico City, where she was a practicing family counselor. After Celia learned English, she registered with the state of Colorado to be a counselor of mono-lingual families. She’s working actively with five families, served by SIRFI, who are monolingual in Spanish. And that’s just huge – I don’t think we’ve ever had that resource here before.”

**PAULETTE CHURCH**

*Executive Director, Adult Education Center of Durango*

## INITIATIVES

### SUICIDE PREVENTION

*The Trust supports two efforts to address the high rate of suicide in the state. The Preventing Suicide in Colorado Initiative, launched in 2002, is designed to encourage people at risk of attempting suicide to seek care, improve the care at-risk individuals receive and promote policies that help to reduce the risk of suicide. Additionally, in partnership with Mile High United Way, The Trust provides support for Colorado LINK, a school-based suicide-prevention program at Denver Public Schools’ North and East High Schools and at Urban Peak, a shelter for homeless youth.*

### SUPPORTING IMMIGRANT AND REFUGEE FAMILIES

*The Trust supports 23 organizations across the state that provide Colorado’s immigrant and refugee population with much-needed services such as counseling and support groups, parenting classes and English as a Second Language classes. The Spring Institute for Intercultural Learning manages this effort, as well as the development of The Trust-funded interpreter bank that is focused on improving health care access for immigrants and refugees.*

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# Strengthen

EIGHTEEN

“The most exceptional part of the Senior Wellness Initiative was the fact that seniors provided the education and motivation to their peers. As staff we had a double mission: for seniors to educate seniors in adopting healthy lifestyles, and for seniors to become advocates for wellness in their communities. The evaluation found this mission to be implemented successfully and completely congruent with the Healthy People 2010 strategy for accentuating positive personal wellness behavior. Evaluation findings also indicate that we were successful in broadening the concept of health to include

# Families

the wellness definition of balancing physical, emotional, spiritual and mental aspects of one’s self. I am very proud of that fact, and have had immense fun working with initiative participants toward this goal. We learned that the wellness concept resonated with the seniors because it can be implemented with humor, low cost and creativity, and from myriad local resources. I am grateful to The Trust for having the vision to see wellness as a viable solution to helping seniors improve their own self care and that of their community.”

**CHRIS KATZENMEYER**  
*Manager, Senior Wellness Initiative*

## INITIATIVES

### PALLIATIVE CARE

*The Colorado Trust’s three-and-a-half-year Palliative Care Initiative is designed to improve palliative care in Colorado. The idea of palliative care — compassionate, comprehensive care for people with progressive, chronic, life-threatening or terminal medical conditions — is beginning to take root in the U.S., as it has in other countries. Through this effort, more than 90 organizations have formed networks in eight urban and rural Colorado communities to address the complex and changing physical, social and spiritual needs of patients living with life-threatening illnesses.*

### SENIOR WELLNESS

*To help Colorado seniors enjoy healthy lives, The Trust made a seven-year commitment to Senior Wellness. This statewide effort, which ended in 2002, brought together more than 600 seniors from 60 communities across the state for regional wellness conferences. These gatherings — designed by seniors for seniors — helped participants learn more about issues related to their mental, physical, emotional and spiritual health. With a small stipend from the initiative, teams of seniors used what they learned at the conference to develop and put in place wellness projects in their communities. The projects were diverse, including such things as community health fairs for seniors, strength training for home-bound seniors in assisted living facilities and community-wide wellness walks led by seniors.*

A SPECIAL PROJECT OF THE COLORADO TRUST



# The Colorado Trust

TWENTY

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“As one of first Jewish women to participate in this program, I appreciated the diversity of the Fellows class. It was incredible to be exposed to all the experiences of the other Fellows. And not only were the people inspiring, the program was intellectually stimulating. It gave me experiences that help me with the quality of the work I do. I’m able to come up with creative concepts and network in the nonprofit community, and I have the leadership skills necessary to build bridges outside my small world. For example, in my job at the Allied Jewish Federation, I’m developing innovative concepts to attract donors and change people from ‘impulse philanthropy to impact philanthropy.’ I’m finding people – particularly young donors – to be very receptive because they’re interested in learning more about needs and being connected to their communities. I too feel connected to the community and invested in Colorado as a result of going through this program. I believe that the Fellows program is cultivating people who are the future of the nonprofit sector in Colorado.”

**JEN GILBERT**

*Trust Fellow and Director of Allocations and New Product Development,  
Allied Jewish Federation*

## THE COLORADO TRUST FELLOWS PROGRAM

*More than 15,000 nonprofit organizations in Colorado provide critical basic services and serve as catalysts for innovative social change. The nonprofit sector also has a significant economic impact in the state. In 2000, Colorado nonprofit agencies spent more than \$8 billion.*

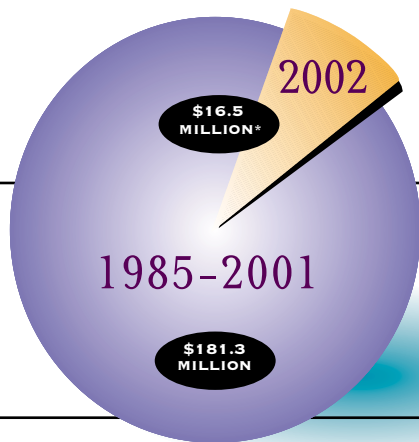
*The Colorado Trust Fellows Program, a collaborative project of The Trust and Regis University, was created to prepare future managers and leaders to guide Colorado’s nonprofit organizations and advance the sector.*

*Annually, twelve fellows, who are diverse in age, culture and areas of expertise, are selected through a competitive process that is guided by a community-based advisory committee. The fellows receive support from The Trust to attend the Master of Nonprofit Management program at Regis University. Managed and directed by Regis University, the program provides selected fellows with academic training in nonprofit management and an interactive leadership development program.*

*The Trust has devoted \$2.1 million to the twelve-year effort (through 2006), and 97 fellows, 39 of whom are ethnic or racial minorities, have graduated from or are now participating in the program. Alumni have gone on to develop new nonprofit agencies; serve as executive directors of existing foundations and nonprofit organizations; and facilitate collaborations between nonprofits, government, corporations and foundations, including such organizations as: Boulder County AIDS Project, Colorado Energy Assistance Foundation, Colorado I Have a Dream Foundation, Denver Inner City Parish, Doctors Care, Navajo Health System, Project Angel Heart, Salida Build A Generation, Salud Family Clinic, Volunteers of America and many others.*

# t Fellows Program

A SPECIAL PROJECT OF THE COLORADO TRUST



## TOTAL GRANTMAKING

SINCE THE COLORADO TRUST WAS FOUNDED IN 1985  
\$197.8 MILLION

\*ACTUAL DISTRIBUTIONS IN 2002

## THE COLORADO TRUST STATEMENT OF FINANCIAL POSITION

**DECEMBER 31, 2002 AND 2001**

	2002	2001
<b>ASSETS</b>		
Cash and cash equivalents	\$ 43,893	\$ 612,944
Accounts receivable	2,377	649
Interest and dividends receivable	1,112,928	3,289,455
Excise tax receivable	34,469	20,874
Prepaid and other expenses	8,361	2,569
Investments	335,115,463	371,396,774
Other assets	95,901	518,818
Cash held in custody for others	244,591	201,685
Property and equipment		
Building improvements	1,448,009	1,423,598
Machinery and equipment	337,926	408,375
Furniture and fixtures	308,856	421,110
	2,094,791	2,253,083
Accumulated depreciation	(769,704)	(1,037,863)
Property and equipment, net	1,325,087	1,215,220
Investments held in trust	304,732	294,080
<b>TOTAL ASSETS</b>	<b>\$ 338,287,802</b>	<b>\$ 377,553,068</b>
<b>LIABILITIES AND NET ASSETS</b>		
Accounts payable and accrued expenses	\$ 112,299	\$ 973,844
Other accrued liabilities	148,622	288,952
Cash held in custody for others	244,591	201,685
Grants payable	27,606,175	26,619,367
Deferred compensation	304,732	294,080
Deferred excise tax payable	103,352	103,352
<b>TOTAL LIABILITIES</b>	<b>\$ 28,416,419</b>	<b>\$ 28,481,280</b>
<b>NET ASSETS — UNRESTRICTED</b>	<b>\$ 309,871,383</b>	<b>\$ 349,071,788</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$ 338,287,802</b>	<b>\$ 377,553,068</b>



# FINANCIAL STATEMENTS

## THE COLORADO TRUST STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS

FOR THE YEARS ENDED DECEMBER 31, 2002 AND 2001

REVENUES, GAINS AND SUPPORT:	<u>2002</u>	<u>2001</u>
Interest and dividend income, net of investment management fees of \$773,507 and \$1,004,549, respectively	\$ 7,330,786	\$ 9,882,388
Net realized and unrealized loss	39,002,809)	(9,795,011)
Gain on real estate activities	1,487,122	870,773
Other investment income - Sherman Street Properties, Inc.	453,735	429,023
Other income	<u>36,277</u>	<u>81,459</u>
<b>TOTAL REVENUES, GAINS AND SUPPORT</b>	<b><u>\$(29,694,889)</u></b>	<b><u>\$ 1,468,632</u></b>
<b>EXPENSES</b>		
Program services:		
Strengthening Families Initiatives	11,620,657	11,738,835
Accessible and Affordable Healthcare Initiatives	3,726,954	3,457,800
Other grant expense	2,156,513	2,570,587
Grant administration	<u>1,665,582</u>	<u>1,450,988</u>
Total program services	19,169,706	19,218,210
Management and general	1,500,670	1,834,454
Excise tax expense	<u>73,395</u>	<u>118,522</u>
<b>TOTAL EXPENSES</b>	<b><u>\$ 20,743,771</u></b>	<b><u>\$ 21,171,186</u></b>
Change in net assets before cumulative effect of change in accounting principle and gain on insurance settlement	(50,438,660)	(19,702,554)
Gain on insurance settlement	117,367	
Cumulative effect of change in accounting principle	<u>11,120,888</u>	<u>                    </u>
<b>CHANGE IN NET ASSETS</b>	<b><u>\$(39,200,405)</u></b>	<b><u>\$(19,702,554)</u></b>
Net assets at beginning of year	<u>349,071,788</u>	<u>368,774,342</u>
<b>NET ASSETS AT END OF YEAR</b>	<b><u>\$309,871,383</u></b>	<b><u>\$ 349,071,788</u></b>

# Financials

TWENTY-THREE

TOTAL GRANTS MADE IN 2002: \$16.5 MILLION



# Grantmaking in 2002

TWENTY-FOUR

# ADVANCING ACCESSIBLE & AFFORDABLE HEALTH CARE

## PROMOTING HEALTH AND PREVENTING DISEASE INITIATIVES

### COLORADO HEALTHY PEOPLE 2010

Total commitment (2002-2005): \$9 million  
Distributed in 2002: \$1,596,381

#### METROPOLITAN DENVER AREA

**Coordinating Agency:** Tri-County Health Department

**Community Grantees:**

- Broomfield Health and Human Services
- Commerce City Community Health Services
- Consortium for Older Adult Wellness
- Curtis Park Community Center
- Denver Museum of Nature and Science
- Denver Osteopathic Foundation
- Home Care Center for Living Independently
- Rocky Mountain Poison and Drug Center
- St. Anthony Central Hospital

#### SOUTHEASTERN COLORADO

**Coordinating Agency:** Southeast Colorado Area Health Education Center

**Community Grantees:**

- Bent County Nursing
- Cheyenne County Public Health
- CSU Extension: Lamar Office – Healthy, Wealthy & Wise Campaign
- Parkview School Based Wellness Center
- Penrose-St. Francis Health Foundation – Health Learning Center
- St. Mary Corwin Hospital
- Teller County Public Health
- University of Southern Colorado

#### SOUTHWESTERN COLORADO

**Coordinating Agency:** Colorado Foundation for Families and Children

**Community Grantees:**

- Columbine NP Clinic
- Hilltop Community Resources (Be4 Babies)
- Hinsdale County Public Health
- Marillac Clinic
- Planned Parenthood of the Rocky Mountains – Cortez Health Center
- San Juan Basin Health Department
- Spanish Peaks Regional Health Center

#### NORTHEASTERN COLORADO

**Coordinating Agency:** Northeast Colorado Health and Human Services Planning Consortium

**Community Grantees:**

- Baby Bear Hugs
- Centennial Board of Cooperative Educational Services
- Centennial Mental Health Center
- Island Grove Regional Treatment Center
- North Colorado Psychcare
- North Range Behavioral Health
- Northeast Colorado Health Department
- Rural Communities Resource Center
- Wray School District

#### NORTHWESTERN COLORADO

**Coordinating Agency:** Fort Collins Area United Way, Inc.

**Community Grantees:**

- Colorado State University – Happy Feet Healthy Eats
- CSU Cooperative Extension – Rx Health
- Consortium for Older Adult Wellness
- Estes Park Salud Foundation
- Full Circle of Lake County
- Girl Scouts
- Memorial Hospital – Craig
- Partners of Larimer County
- Health District of Northern Larimer County
- Rocky Mountain Youth Corps

### COLORADO IMMUNIZATION

#### CHILDREN

**Total commitment (1996-2004):** \$3.4 million

**Distributed in 2002:** \$649,188

**Grantee:** Colorado Children's Immunization Coalition

#### ADULTS

**Total commitment (2001-2004):** \$460,000

**Distributed in 2002:** \$167,500

**Grantee:** Visiting Nurse Association

## STRENGTHENING DELIVERY OF HEALTH CARE SERVICES INITIATIVES

### COLORADO HEALTH INSTITUTE

Total commitment (2002-2007): \$2,000,000  
Distributed in 2002: \$50,000

### COLORADO RURAL OUTREACH PROGRAM\*

Total commitment (2000-2004): \$533,334  
Administered by: Colorado Rural Health Center

### IMPROVE QUALITY OF PATIENT CARE

Distributed in 2002: \$29,099  
*Exploration of potential new initiative*

## ADDRESSING THE NEEDS OF THE MEDICALLY UNDERSERVED INITIATIVES

### COALITION FOR THE MEDICALLY UNDERSERVED

Total commitment (1997-2004): \$1.1 million  
Distributed in 2002: \$318,128

### COLORADO CHILDREN'S CAMPAIGN

Total commitment (2000-2002): \$300,000  
Distributed in 2002: \$100,000

### COMMUNITY VOICES

Total commitment (1998-2003): \$1.8 million  
Distributed in 2002: \$249,632  
Grantee: Denver Health (Denver)

### DENVER'S BEST BABIES

Total commitment (1999-2003): \$1.9 million  
Distributed in 2002: \$246,676  
Grantee: Denver Health (Denver)

### FAMILY HEALTH CARE COLLABORATIVE

Total commitment (2000-2003): \$220,000  
Distributed in 2002: \$55,000  
Grantee: Marillac Clinic (Mesa County)

*\*The Colorado Rural Outreach Program was previously listed under Addressing the Needs of the Medically Underserved Initiatives.*

## PROVIDING RESOURCES TO STRENGTHEN FAMILIES

### ADDRESSING THE NEEDS OF CHILDREN AND YOUTH INITIATIVES

#### ASSETS FOR COLORADO YOUTH

Total commitment (1997-2003): \$10.1 million  
Distributed in 2002: \$752,930

#### COLORADO HEALTHY STEPS

Total commitment (1997-2003): \$2.4 million  
Distributed in 2002: \$343,218

#### Grantees:

- Kaiser Permanente (Westminster)
- Montrose County Health and Human Services (Montrose County)
- Primary Care Partners (Grand Junction)

#### EDUCARE COLORADO

Total commitment (1998-2005): \$7.6 million  
Distributed in 2002: \$990,436

#### HOME VISITATION/INVEST IN KIDS

Total commitment (1993-2007): \$11.9 million  
Distributed in 2002: \$882,375  
Coordinating Agency: Invest in Kids

### Preventing Violence

#### PREVENTING YOUTH HANDGUN VIOLENCE

Total commitment (1998-2003): \$900,000  
Distributed in 2002: \$127,083

#### Grantees:

- The Conflict Center (Denver)
- Project PAVE (Promoting Alternatives to Violence through Education) in partnership with Catholic Charities (Denver)

#### PROJECT EXILE

Total commitment (2002): \$100,100  
Distributed in 2002: \$100,100

#### YOUTH AND VIOLENCE

Total commitment (2000-2002): \$250,000  
Distributed in 2002: \$50,000  
Grantee: Families and Work Institute

## Supporting Schools

### AFTER-SCHOOL

**Total commitment (2000-2005):** \$11 million

**Distributed in 2002:** \$2,717,907

#### Coordinating Agencies:

- Colorado Foundation for Families and Children
- Colorado Springs Assets for Youth and Colorado Springs Park, Recreation and Cultural Services
- Montrose Memorial Hospital/Teaching Prevention Promoting Inclusion and Valley-wide Health Services, Inc.

#### Grantees:

- Adams 12 Five-Star Schools (Adams County)
- Archuleta County Education Center (Archuleta County)
- Asian Pacific Development Center (Aurora)
- Aspen Ballet Company and School (Pitkin County)
- Black Canyon Boys and Girls Club (Montrose County)
- Boys and Girls Club of Pueblo County and Lower Arkansas Valley (Pueblo County)
- Canon City Metro Park and Recreation (Freemont County)
- City of Cripple Creek Park and Recreation (Teller County)
- City of Longmont – Division of Youth Services (Longmont)
- Colorado State University Cooperative Extension (El Paso County)
- Community Health Education Services – Jammin' in Northeast Denver (Denver)
- Cross Community Coalition (Denver)
- Dolores County Broadcast Network (Dolores County)
- Durango Latino Education Coalition (La Plata County)
- Escuela Tlatelolco (Denver)
- Estes Valley Recreation and Park District (Larimer County)
- Fishers Peak YMCA (Las Animas County)
- Jewish Community Center of Denver (Denver)
- La Plata Family Centers Coalition/SUCAP (La Plata County)
- Lake County School District (Lake County)
- Mercy Housing Southwest (Adams and Denver counties)

- Mesa County Department of Human Services After-School Programs (Mesa County)
- Metro Black Church Initiative (Denver)
- Mi Amigo – Valle de Sol (Conejos County)
- Mile High United Way (Denver)
- Park County RE-2 School District (Park County)
- Pikes Peak YMCA (El Paso County)
- Plateau School District RE-5 (Logan County)
- Grand Futures Prevention Coalition (Moffat County)
- Salvation Army (El Paso County)
- Sojourner School (Boulder County)
- St. Andrew Avelino Youth Guild (Costilla County)
- University of Denver Bridge Project (Denver County)
- Ute Mountain Ute Tribe (Montezuma County)

### CASASTART

**Total commitment (1999-2003):** \$926,302

**Distributed in 2002:** \$50,522

**Grantee:** Adams County School District 14

### GATES SMALL SCHOOLS

**Total commitment (2001-2003):** \$440,000

**Distributed in 2002:** \$225,000

**Coordinating Agency:** Colorado Children's Campaign

**Grantee:** Manual High School

### SAFE COMMUNITIES~SAFE SCHOOLS

**Total commitment (1999-2005):** \$3.4 million

**Distributed in 2002:** \$808,416

**Coordinating Agency:** Center for the Study and Prevention of Violence

#### Grantees:

- Central High School (Pueblo)
- Del Norte School District C-7 (Rio Grande County)
- Gunnison School District RE-1J (Gunnison County)
- Hayden School District RE-1 (Routt County)
- Huron Middle School (Northglenn)
- Lake County School District RE-1 (Lake County)
- Lincoln Junior High School (Fort Collins)
- Mesa County District #51 (Mesa County)

- Montrose County District RE-1J – Columbine Middle School (Montrose County)
- Mountain Valley School District RE-1 (Saguache County)
- Ranum High School (Adams County)
- Rose Hill Elementary School (Commerce City)
- Sheridan School District (Englewood)
- Summit School District RE-1 (Summit County)
- Vivian Elementary School (Lakewood)
- West Valley Alternative High School (Colorado Springs)
- William Smith High School (Aurora)

## ADVANCING QUALITY MENTAL HEALTH CARE INITIATIVES

### MENTAL HEALTH FUNDERS COLLABORATIVE

**Total commitment:** \$30,000

**Distributed in 2002:** \$30,000

*Study of mental health care needs in Colorado – to be completed in 2005*

### SUICIDE PREVENTION

#### PREVENTING SUICIDE IN COLORADO

**Total commitment (2002-2006):** \$2.6 million

**Distributed in 2002:** \$11,011

**Coordinating Agency:** The University of Colorado-Denver, in partnership with the Mental Health Association of Colorado

#### PREVENTING YOUTH SUICIDE

**Total commitment (2000-2002):** \$450,000

**Distributed in 2002:** \$110,013

**Grantee:** Colorado LINK

### SUPPORTING IMMIGRANT AND REFUGEE FAMILIES

**Total amount (2000-2005):** \$7.4 million

**Distributed in 2002:** \$2,268,939

**Coordinating Agency:** Spring Institute for Intercultural Studies

#### Grantees:

- A.F. Williams Family Medicine Center (metropolitan Denver area, Colorado Springs and Grand Junction)
- Asian Pacific Development Center (El Paso County)
- Adult Education Center of Durango/La Plata Unity Coalition (Four Corners region)
- Boulder County Immigrant Collaborative (Boulder and Weld counties)
- Catholic Charities Northern (City of Greeley and Weld County)

- Catholic Charities Pueblo (Crowley, Otero and Pueblo counties)
- Colorado West Regional Mental Health Center (Routt and Moffat counties)
- Crawford Family Resource Center, Aurora Public Schools (Aurora)
- Ethnic Counseling/Consultation Community Outreach Services Family Center (metropolitan Denver)
- Family Ties West (Montrose, Delta, San Miguel, Ouray, Gunnison and Hinsdale counties)
- Family Visitor Program (Garfield and Pitkin counties, and the Basalt/El Jebel area of Eagle County)
- FindtheGood.org/Colorado Muslim Women's Association (metropolitan Denver, Fort Collins and Colorado Springs)
- Focus Points Family Resource Center (metropolitan Denver)
- Hmong American Association of Colorado (Colorado)
- Jewish Family Service (metropolitan Denver area)
- Plan de Salud del Valle, Inc. (Adams, Boulder, Larimer, Morgan and Weld counties)
- Rocky Mountain Survivor's Center (Colorado)
- Rural Communities Resource Center (Washington and Yuma counties)
- San Luis Valley Christian Community Services Immigrant Resource Center (Alamosa, Conejos, Costilla, Mineral, Rio Grande and Saguache counties)
- Servicios de la Raza, Inc. (Colorado)
- St. Mary's Family Practice Residency (Mesa County)
- Summit County Family Resource Center (Summit County)
- Vietnamese Elderly Association of Colorado (Adams, Arapahoe, Denver and Jefferson counties)

## SERVING THE AGING INITIATIVES

### PALLIATIVE CARE

**Total commitment (2000-2003):** \$3.7 million

**Distributed in 2002:** \$1,076,649

**Coordinating Agency:** Centura Health

**Grantees:**

- CARE Connection (Denver)
- Caring Connections... Living Beyond Illness (Garfield, Pitkin and western Eagle counties)
- Larimer County Palliative Care Initiative (Larimer County)
- The L.I.F.E. Network (Mesa County)
- Palliative Care Partners (Alamosa, Conejos, Costilla, Mineral, Rio Grande and Saguache counties)
- Pueblo Palliative Care Initiative (Pueblo)
- Supportive Care Network (Denver)
- West End Uncompahgre Palliative Network (western Montrose County and the town of Norwood)

**SENIOR WELLNESS**

**Total commitment (1995-2002):** \$1.4 million

**Distributed in 2002:** \$275,007

**Grantee communities:**

- Aspen
- Aurora
- Boulder
- Broomfield
- Colorado Springs
- Denver
- Fairplay
- Fleming
- Fountain
- Glenwood Springs
- Haxtun
- Jefferson
- Lafayette
- Las Animas
- Norwood
- Pitkin County
- Pueblo
- Redvale
- Rifle
- Silt
- Snowmass Village
- Wray

## SPECIAL PROJECTS

**COLORADO FOUNDATION FOR FAMILIES AND CHILDREN, INC.:** \$50,000

**THE COLORADO TRUST FELLOWS PROGRAM**

**Total commitment (1995-2006):** \$2.1 million

**Coordinating Agency:** Regis University

**COUNCIL ON FOUNDATIONS:** \$34,600

**GRANTMAKERS IN HEALTH:** \$12,600

**HOMELESS PREVENTION**

**ADMINISTRATION:** \$7,729

**MEMORIAL CONTRIBUTIONS:** \$2,500

## OTHER DISTRIBUTIONS

In addition to its grantmaking, The Colorado Trust makes other distributions to support charitable purposes in Colorado. As a result of its historical relationship with both the Colorado Episcopal Foundation and the Presbytery of Denver, The Trust makes annual distributions to these churches for charitable activities of their choice. The foundation also matches contributions to charitable organizations made by members of the board of trustees and staff, and makes directed contributions to charitable organizations designated by trustees and officers of The Trust. In 2002, such contributions were made to more than 260 organizations across the state.

**COLORADO EPISCOPAL FOUNDATION**

**Distributed in 2002:** \$581,675

**PRESBYTERY OF DENVER**

**Distributed in 2002:** \$581,675

**TRUSTEE/EMPLOYEE MATCHING CONTRIBUTIONS**

**Distributed in 2002:** \$129,677

**DIRECTED CONTRIBUTIONS**

**Distributed in 2002:** \$755,000

# THE COLORADO TRUST BOARD OF TRUSTEES



THIRTY



**CHAIRMAN — 2003****Judith B. Wagner***President**Wagner Investment Management, Inc.**\*Treasurer — 2002***Patricia Baca, Ed.D.***Educational Consultant**\*\*joined the board — 2002***VICE CHAIRMAN — 2003****Jerome M. Buckley, M.D.***President and CEO**COPIC Insurance Company**\*Secretary — 2002***Donald W. Fink, M.D.***Radiologist (retired)**Presbyterian/St. Luke's Medical Center**\*\*retired from the board — 2002***SECRETARY — 2003****William N. Maniatis, M.D.***Urologist**Aurora Urology, P.C.***Jean C. Jones***Executive Director**Girl Scouts - Mile Hi Council**\*Chairman — 2002***TREASURER — 2003****Stephen B. Clark***President**SB Clark, Inc.***Sister Lillian Murphy, RSM***President and CEO**Mercy Housing, Inc.**\*Vice Chairman — 2002***GENERAL COUNSEL****Jack D. Henderson, Esq.****Kathryn A. Paul***President**Delta Dental Plan of Colorado***A. Gordon Rippey***President (retired)**Rippey and Company**\*\*retired from the board — 2002***Reginald L. Washington, M.D.***Vice President, Western Cardiology**Associates, Pediatric Division**\*\*joined the board — 2002*

\*Board office held in 2002.

\*\*Don Fink and Gordon Rippey, the last two of The Trust's original board members, retired in October.

Our gratitude to Don and Gordon is immense for the strong leadership they each exhibited and their unwavering commitment to The Trust in serving as trustees for a remarkable 17 years. We also welcome two new trustees, Patricia Baca and Reginald Washington, each of whom brings a wealth of experience in the education and health care arenas, respectively, along with enthusiasm and new perspectives.

(LEFT TO RIGHT, BOTTOM ROW: JACK D. HENDERSON, REGINALD L. WASHINGTON AND STEPHEN B. CLARK; SECOND ROW: SISTER LILLIAN MURPHY AND JUDITH B. WAGNER; THIRD ROW: JOHN R. MORAN, JR., PATRICIA BACA AND JEAN C. JONES; TOP ROW: JEROME M. BUCKLEY, WILLIAM N. MANIATIS AND KATHRYN A. PAUL)

# THE COLORADO TRUST STAFF



THIRTY-TWO

## STAFF

**John R. Moran, Jr.**  
*President and CEO*

**Jean D. Merrick**  
*Senior Vice President*

**John L. Samuelson, CPA**  
*Vice President and  
Chief Financial Officer*

**Phillip Bloise, CPA**  
*Senior Staff Accountant*

**Carol Breslau**  
*Senior Program Officer*

**Michele M. Chader**  
*Program Associate*

**Tara Corwin**  
*Network Administrator/  
Payables Accountant*

**Nancy Baughman Csuti, Dr.P.H.**  
*Senior Evaluation Officer*

**Mary Ann Davis**  
*Senior Assistant/  
Events Coordinator*

**Lynn Dierker**  
*Program Officer*

**Susan Downs-Karkos**  
*Program Officer*

**Ed Guajardo Lucero**  
*Program Officer*

**Dale Honor**  
*Program Initiatives Assistant*

**Jill Johnson**  
*Front Desk Manager*

**Joanne Johnson**  
*Controller*

**Jennifer Lehman**  
*Executive Associate*

**Christie McElhinney**  
*Senior Communications Officer*

**Bridget Monahan**  
*Evaluation Associate*

**Rachel A. E. Mondragon**  
*Website and Office Manager*

**Sarah Moore**  
*Communications Associate*

**Bonnie C. Moya**  
*Meeting Room Manager*

**Lori J. Vettraino**  
*Grants Administrator*

**Soo-Jin Yoon**  
*Evaluation Officer*

(LEFT TO RIGHT, BOTTOM ROW: ED GUAJARDO LUCERO, JOANNE JOHNSON, CAROL BRESLAU AND DALE HONOR; SECOND ROW: MARY ANN DAVIS, JILL JOHNSON, BONNIE C. MOYA, NANCY BAUGHMAN CSUTI AND SUSAN DOWNS-KARKOS; THIRD ROW: CHRISTIE MCELHINNEY, MICHELE M. CHADER, RACHEL A. E. MONDRAGON, SARAH MOORE, JEAN D. MERRICK, SOO-JIN YOON AND JOHN R. MORAN, JR.; TOP ROW: BRIDGET MONAHAN, LYNN DIERKER, JENNIFER LEHMAN, JOHN L. SAMUELSON, PHILLIP BLOISE, TARA CORWIN AND LORI J. VETTRAINO)

THE COLORADO TRUST 2002  
Annual Report

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