



THE
COLORADO
TRUST

2011 Annual Report

Achieving access to health for all Coloradans



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About Us

» VISION

The Colorado Trust is dedicated to achieving access to health for all Coloradans.

Our focus is on improving health equity by ending inequalities affecting racial/ethnic, low-income and other disadvantaged populations, so all Coloradans can achieve optimal health. To achieve this vision, The Trust supports the development and dissemination of robust health data to pinpoint specific challenges and to inform solutions; efforts to increase public awareness and advocacy to build a strong base of support for access to health through policy solutions; and the provision of services and strengthening of systems that expand health coverage and improve access to health care to ensure that:

- Every child will have a real opportunity to grow up healthy
- Colorado will have a healthy population that contributes to the prosperity of the state
- Affordable health care coverage will be available to all families and individuals
- Accessible, quality care will be the norm
- The health system will deliver care that is responsive to the needs of all Coloradans.

» MISSION

The Colorado Trust is dedicated to advancing the health and well-being of the people of Colorado.

» HISTORY

When the nonprofit PSL Health-care Corporation was sold to a for-profit organization in 1985, the proceeds of the sale were used to create a foundation dedicated exclusively to the health of the people of Colorado.

Since that time, The Colorado Trust has worked closely with nonprofit organizations in every county across the state to improve health and well-being, ranging from bringing 9-1-1 emergency medical care to 38 Colorado counties to helping foster the development of the state's second largest regional transportation district in the Roaring Fork Valley, and much more.

About Us

» HOW WE MAKE GRANTS

The Colorado Trust's strategic grantmaking supports the development of a coordinated system of policies, programs and services that expand health coverage, and improve and expand health care.

For these grant strategies, The Trust issues Requests for Applications (RFA) and welcomes responses from nonprofit organizations and governmental entities across Colorado. When a competitive funding opportunity is available, a detailed RFA with related instructions and application deadlines is posted to our website. Sign up to be automatically notified by email of future funding opportunities.

On occasion, The Trust also asks organizations that are focused on strategies specific to achieving access to health to submit individual, non-competitive proposals. The Colorado Trust does not accept unsolicited requests for funding with one exception, the Convening for Colorado program. Applications for Convening for Colorado are accepted on an ongoing basis and reviewed monthly.

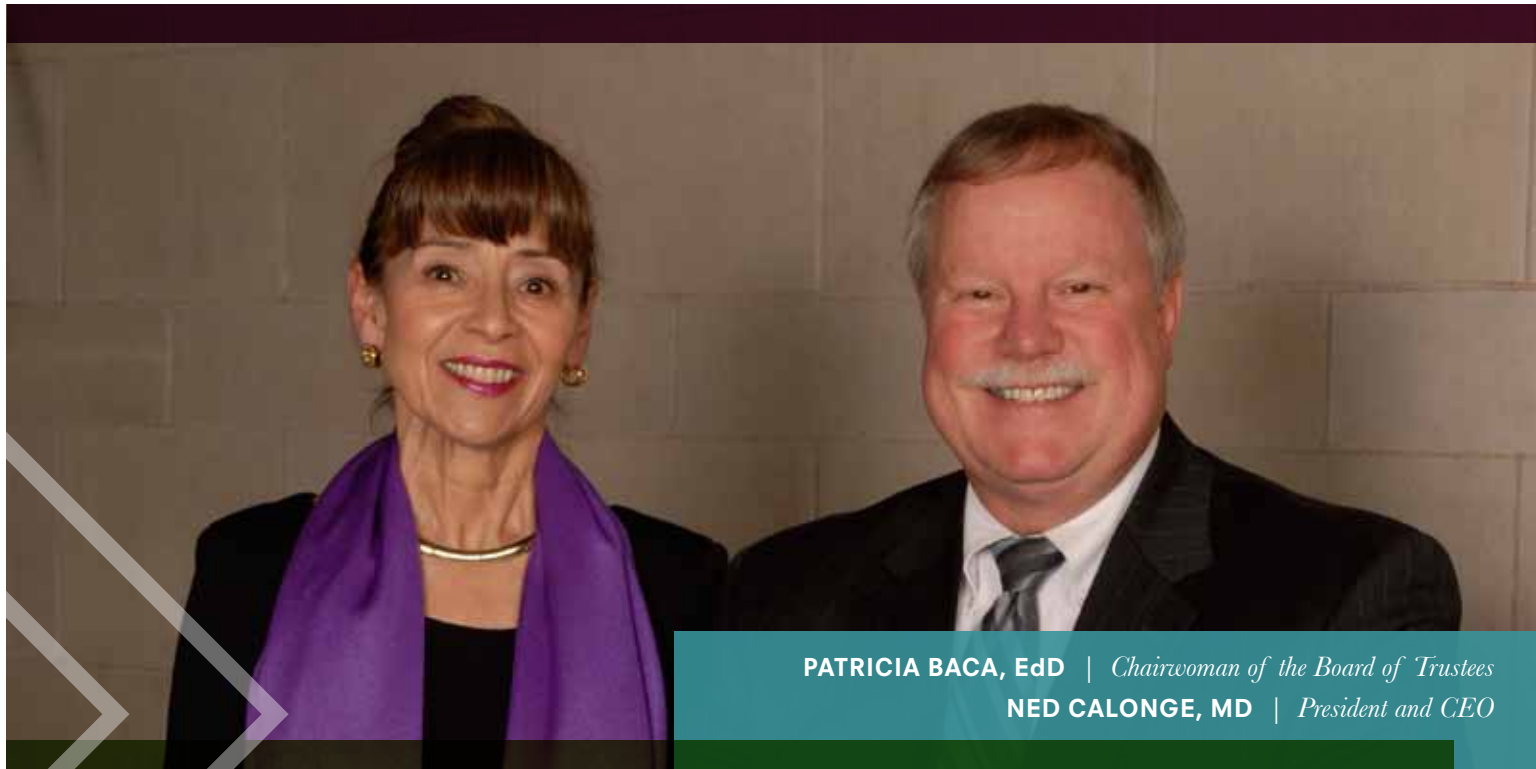
» ELIGIBILITY

In response to an RFA or an individual invitation issued by The Trust, the following types of organizations are eligible to apply for grants:

- Nonprofit organizations that are exempt under Section 501(c)(3) of the Internal Revenue Code and are classified as "not a private foundation" under Section 509(a)
- Independent sponsored projects of a nonprofit 501(c)(3) organization acting as a fiscal agent
- Government and public agencies.

The Colorado Trust does not make grants for the following:

- Political campaigns or voter registration drives
- Capital funding for the purchase, construction or renovation of any facilities or other physical infrastructure
- Operating deficits or retirement of debt
- Indirect allocations (excluding fiscal agent fees)
- Religious purposes.



PATRICIA BACA, EdD | *Chairwoman of the Board of Trustees*
NED CALONGE, MD | *President and CEO*

Message from Leadership

Over the past few years, we've witnessed a number of critical health care events. In 2008, a bipartisan commission completed a blueprint for improving health care in Colorado with near unanimity. In 2009, Colorado lawmakers enacted a hospital-provider fee law that has helped increase health coverage for an estimated 100,000 Coloradans and reduced costs for uncompensated care. The Affordable Care Act, passed in 2010, goes a long way toward improving care in the United States and is one of the nation's most significant laws in 50 years. In 2011, in response to the ACA, Colorado lawmakers enacted legislation that established a health insurance exchange that will provide even more Coloradans with access to health insurance. During this same time, we suffered a severe recession, which increased needs as resources diminished.

Throughout, The Colorado Trust has maintained its commitment to achieve access to health for all Coloradans. In working to achieve

this vision, The Trust supports the development and dissemination of robust health data to pinpoint specific challenges and to inform solutions; efforts to increase public awareness and advocacy to build a strong base of support for access ...to health through policy solutions; the provision of services and strengthening of systems that expand health coverage and improve access to health care; and efforts to advance the health and well-being of the people of Colorado. In this work, our first focus always is on those individuals and families who have historically been ignored and underserved in the health care system, and those who are most vulnerable.

We've also learned that the best way to ensure our grant strategies address current and emerging needs is to collect insights directly from the stakeholders and leaders who know best the unique challenges and potential of their own communities. As such, we are conducting an in-depth

environmental scan to help inform our future grantmaking.

This is an incredibly interesting time to work at a health foundation – filled with challenges, uncertainties, needs, opportunities and hope. We are pleased to partner with grantees whose accomplishments continue to grow stronger, and who share our enthusiasm and sense of urgency for this work. We express a deep thanks to our many partners and underscore our continuing commitment to work together to expand health coverage and improve access to health care for the people of our state.

Sincerely,

Patricia Baca, EdD
Chairwoman of the
Board of Trustees

Ned Calonge, MD
President and CEO



2011

Grants

» ACHIEVING ACCESS TO HEALTH FOR ALL COLORADANS

The Colorado Trust is dedicated to achieving access to health for all Coloradans. Our focus is on improving health equity by ending inequalities affecting racial/ethnic, low-income and other disadvantaged populations, so all Coloradans can achieve optimal health.

To achieve this vision, The Trust supports the development and dissemination of robust health data to pinpoint challenges and to inform solutions; efforts to increase public awareness and advocacy to build a strong base of support for access to health through policy solutions; the provision of services and strengthening of systems that expand health coverage and improve access to health care; and an array of efforts to advance the health and well-being of the people of Colorado.



HEALTH DATA & INFORMATION



HEALTH ADVOCACY & POLICY



HEALTH CARE SERVICES & SYSTEMS



HEALTH & WELL-BEING

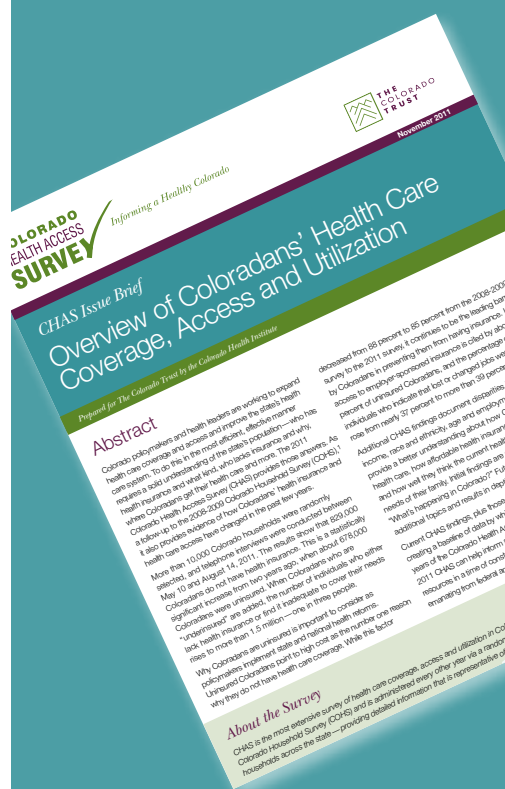
Grants



HEALTH DATA & INFORMATION

In 2011, The Colorado Trust continued its support for the collection, analysis and dissemination of robust health data to help pinpoint the health-related challenges we face, and inform solutions to expand health coverage and improve care by:

- Extending our long-time core support for the Colorado Health Institute, an impartial clearinghouse for data and analysis on Colorado's health care issues and systems
- Launching the Colorado Health Access Survey (CHAS), an extensive survey of health care coverage, access and utilization in Colorado
- Supporting the Center for Improving Value in Health Care in planning for the development of the state's All-Payer Claims Database, to inform health care quality improvement, cost containment and value across the health care system
- Partnering with the Caring for Colorado Foundation, the Colorado Health Foundation and The Denver Foundation on the research and development of The Status of Behavioral Health Care in Colorado, a comprehensive assessment and critical analysis of public and private behavioral health in the state.



Grants

HEALTH DATA & INFORMATION STORY



“
*Having worked
more than 20 years
to connect people with
insurance, I never
dreamed I'd be in the
situation of not being
able to cover my
own family.*”

CAROL SHARP,
CRAIG, COLORADO

» UNINSURED IN COLORADO: NOT A UNIQUE STORY

Good health depends on many factors, including access to quality health care. Research shows that individuals with health insurance coverage have better access to health care services and experience better health outcomes than people who are uninsured. People without health insurance are less likely to receive preventive care, are frequently diagnosed when their diseases are more advanced, tend to receive less therapeutic care and are more likely to die prematurely than individuals with insurance.

The 2011 Colorado Health Access Survey (CHAS) found that 829,000 Coloradans do not have any health insurance, and another 675,000 are “underinsured” or don’t have adequate health insurance for their family’s needs.

The affordability of health insurance has been a central issue in the health care reform debate. An in-depth look at CHAS data provides detailed information about health insurance affordability and reveals the underlying reasons for being uninsured – including a demographic portrait of the uninsured in Colorado, what they now pay for out-of-pocket medical expenses, their ability and willingness to pay for health insurance and how much they believe they can afford to pay for health insurance. CHAS also offers insights into the health and financial consequences of being uninsured in Colorado.

Carol Sharp knows the consequences all too well. Her husband was laid off in June 2011 after working for his company for 23 years. “We had the kind of insurance people dream about,” she said.

Just weeks after the layoff, their son, who was a full-time college student, suffered a traumatic brain injury as a result of a dirt bike accident. He spent six months in the hospital and had a long recovery ahead of him. Because of her husband’s layoff, the family’s insurance coverage had been dropped. Eligible for COBRA, they paid \$750 a month to cover her husband and son for a few months until their son was able to get coverage through disability Medicaid. At that point, they dropped COBRA and Carol’s husband became uninsured.

Carol was able to get coverage for herself through her employer, which offers a very basic group insurance policy. Carol pays about \$200 for this coverage, but is significantly underinsured. She said it would cost her about \$400 more per month to cover her husband on her policy and, at 250% of the federal poverty level (FPL), they just can’t afford it. Her husband is now the full-time caregiver for their son and, as such, he doesn’t qualify for unemployment benefits, so the family subsists on Carol’s income alone.

To add to their situation, their mobile home and car are paid off, and these assets disqualify them from the Colorado Indigent Care Program. So if a major hospitalization happens, “we would be completely out of luck,” she said.

Carol noted the irony of her situation, saying, “Having worked more than 20 years to connect people with insurance, I never dreamed I’d be in the situation of not being able to cover my own family.”

Grants

HEALTH DATA & INFORMATION GRANTEES

ALL KIDS COVERED INITIATIVE (COLORADO COALITION FOR THE MEDICALLY UNDERSERVED)

Examining and reporting on the status of children's access to health coverage and care throughout Colorado.

GRANT TIMEFRAME: 2010-2012

GRANT AMOUNT: \$32,000

CONTACT: Deidre Johnson

CENTER FOR IMPROVING VALUE IN HEALTH CARE

Support for planning the development of the state's All-Payer Claims Database to inform health care quality improvement, cost containment and value across the health care system.

GRANT TIMEFRAME: 2010-2011

GRANT AMOUNT: \$180,000

CONTACT: Laurel Petralia

COLORADO BLACK HEALTH COLLABORATIVE

Support for the development of a health resource guide for Colorado's African-American/Black community.

GRANT TIMEFRAME: 2011

GRANT AMOUNT: \$10,000

CONTACT: Chris Armijo

COLORADO DEPARTMENT OF HEALTH CARE POLICY AND FINANCING – OUTREACH SPECIALIST

Through a new staff position, providing technical support to community-based organizations working to increase outreach to and enrollment of children who are eligible but not enrolled in Medicaid or CHP+.

GRANT TIMEFRAME: 2008-2011

GRANT AMOUNT: \$150,000

CONTACT: Deidre Johnson

COLORADO HEALTH ACCESS SURVEY

Managed by the Colorado Health Institute, the CHAS is an extensive survey in Colorado of health care coverage, access and utilization.

GRANT TIMEFRAME: 2011-2018

GRANT AMOUNT: \$4,500,000

CONTACT: Nancy Csuti

COLORADO HEALTH INSTITUTE

Created in 2003 through a funding partnership of The Colorado Trust, Rose Community Foundation and Caring for Colorado Foundation, the Colorado Health Institute serves as a reliable and impartial clearinghouse for data collection, analysis and dissemination on Colorado health care issues and systems.

GRANT TIMEFRAME: 2007-2011

GRANT AMOUNT: \$2,049,977

CONTACT: Gwyn Barley

COLORADO HEALTH INSTITUTE – HEALTH PROFESSIONS DATABASE

Supporting the development of a statewide Health Professions Database, including an inventory of health professions academic programs and workforce initiatives, to ensure that programs and policies are data-driven.

GRANT TIMEFRAME: 2008-2011

GRANT AMOUNT: \$410,000

CONTACT: Laurel Petralia

Grants



HEALTH ADVOCACY & POLICY

In 2011, The Colorado Trust supported an array of advocacy, communications, education, research and leadership efforts to help inform and advance health policies to achieve access to health, including:

- Building public will to help achieve access to health through Project Health Colorado, a unique blend of grassroots strategies and an overarching communications campaign aimed at increasing awareness, understanding and support for making health coverage and health care work better for every Coloradan
- Connecting groups of health care advocates to learn from one another, work together over the long term and to quickly respond to timely opportunities to advance health care improvements in Colorado
- Convening policy leaders, health care providers, educational institutions, and economic development and workforce planning authorities to collectively establish a strategic public policy framework for Colorado to address the shortage of providers
- Supporting a comprehensive study of state and local government financing in Colorado to improve the state's ability to expand health coverage and care.

**SHOULD EVERY
CHILD HAVE HEALTH
INSURANCE?**



YES

vote

**project health
colorado.org**

Grants

HEALTH ADVOCACY & POLICY STORY



“*The simple act of telling one’s story sparks a deeper connection to the importance of health care.*”

GRETCHEN HAMMER,
EXECUTIVE DIRECTOR,
COLORADO COALITION
FOR THE MEDICALLY
UNDERSERVED,
DENVER, COLORADO

» SHARING HEALTH CARE EXPERIENCES, ONE STORY AT A TIME

Cerise faced the daunting task of helping her mother get needed care, yet found herself pleasantly surprised with the care and attention to health equity at a local clinic in Denver. “I was utterly amazed at the level and quality of care that she received,” Cerise shared. “Her provider has taken the time to really understand and hear her story. She feels empowered as a consumer, not feeling that she is bound to a system and has to bow to their needs, but really treated like an individual who deserves adequate care.”

Dr. Mark from Denver shares a story of a patient who needed treatment for kidney disease, and her struggle to pay for the necessary care. He tells the story to show how the medical system could change, asking “Isn’t it enough that somebody has lost their kidneys and now has to be on dialysis? Do we have to completely ruin them [financially] before we provide care?”

Dave, who lives in Summit County, gives an all-too-familiar portrayal of the challenges of accessing health care after losing his job. With the availability of health services at an affordable local clinic, Dave is tremendously appreciative of that resource in his community. “It’s quality care for a reduced price, because of the fact we’re taking into consideration you aren’t making as much money as you used to, and you still need health care.”

The common thread that weaves through these three stories is the intensely personal nature of health care, how those personal experiences shape our perceptions and understanding of health care issues, and how that understanding can turn into collective action.

These stories were collected through Colorado HealthStory, an innovative

project of the Colorado Rural Health Center, the Colorado Coalition for the Medically Underserved and ClinicNET. Modeled after National Public Radio’s StoryCorps, Colorado HealthStory uses storytelling as a way to increase awareness and engagement on health care issues – one conversation at a time.

The HealthStory project works with local communities across Colorado to capture digital recordings and testimonials from everyday Coloradans sharing their personal experiences and perspectives about health care. Each story provides unique insight into the health care landscape, whether it is a tragic circumstance of a family not being able to get the care they need or an inspirational account of a community taking action to improve their health and well-being. Once stories have been collected in a community, members of that community are then brought together for a listening session and discussion forum about the health care issues they face, solutions to consider and actions they can take.

The simple act of telling one’s story sparks a deeper connection to the importance of health care. Most storytellers say they feel more engaged and empowered when it comes to health care. And many storytellers have remained engaged by participating in online discussions, recruiting others to share their stories and sharing stories with other networks.

From Rocky Ford to Aurora to Summit County to Durango and points between, Colorado HealthStory is bringing more Coloradans closer to the collective action needed to make health care work better for everyone.

Grants

HEALTH ADVOCACY & POLICY GRANTEES

COLORADO AREA HEALTH EDUCATION CENTERS (UNIVERSITY OF COLORADO FOUNDATION)

Conducting consumer training in advocacy through five regional AHEC centers statewide focusing on policy changes to expand access to health.

GRANT TIMEFRAME: 2008-2011
GRANT AMOUNT: \$700,000
CONTACT: Matt Sundeen

COLORADO COALITION FOR THE MEDICALLY UNDERSERVED – ADVOCACY FOR THE MEDICALLY UNDERSERVED

Advocating for improved health care outcomes and experiences for low and moderate income Coloradans.

GRANT TIMEFRAME: 2010-2012
GRANT AMOUNT: \$150,000
CONTACT: Matt Sundeen

COLORADO CONSUMER HEALTH INITIATIVE

Increasing awareness and providing education to health consumers statewide about barriers to health access, and strengthening advocacy efforts for policy changes to increase access to health care.

GRANT TIMEFRAME: 2008-2011
GRANT AMOUNT: \$150,000
CONTACT: Matt Sundeen

COLORADO HEALTH PROFESSIONS WORKFORCE POLICY COLLABORATIVE

Managed by the Colorado Rural Health Center, convening policy leaders, health care providers, educational institutions, and economic development and workforce planning authorities to collectively establish a strategic public policy framework for Colorado to advance health professions workforce priorities to address the shortage of providers and strengthen the health care system.

GRANT TIMEFRAME: 2010-2011
GRANT AMOUNT: \$199,427
CONTACT: Laurel Petralia

COLORADO HEALTH PROFESSIONS – EVALUATION

Through the Center for Research Strategies, assessing the progress of health care education and workforce training programs conducted by the Colorado Area Health Education Centers, Colorado Center for Nursing Excellence, Colorado Health Institute and Colorado Rural Health Center.

GRANT TIMEFRAME: 2008-2011
GRANT AMOUNT: \$150,000
CONTACT: Nancy Csuti

COLORADO NONPROFIT ASSOCIATION – FISCAL EDUCATION PROJECT

Helping nonprofit organizations in Colorado to better educate their constituencies and the broader population about Colorado's fiscal challenges.

GRANT TIMEFRAME: 2010-2012
GRANT AMOUNT: \$25,000
CONTACT: Matt Sundeen

COLORADO RURAL HEALTH CENTER

Supporting research, education, communications and advocacy to help state policy and health leaders better understand the health needs of rural Coloradans.

GRANT TIMEFRAME: 2008-2011
GRANT AMOUNT: \$150,000
CONTACT: Matt Sundeen

HEALTH CARE ADVOCACY

Supporting the Bell Policy Center, Colorado Center on Law and Policy, and the Colorado Children's Campaign to advocate on behalf of an improved system of health coverage and care in Colorado.

GRANT TIMEFRAME: 2010-2012
GRANT AMOUNT: \$1,012,500
CONTACT: Matt Sundeen

INNOVATION NETWORK

Leading a team of Colorado evaluators in partnering with selected Trust grantees to improve the effectiveness of their advocacy efforts to expand access to health in a changing health policy landscape.

GRANT TIMEFRAME: 2008-2011
GRANT AMOUNT: \$797,600
CONTACT: Nancy Csuti

HEALTH ADVOCACY & POLICY GRANTEES

MEDICAL CLEAN CLAIMS, TRANSPARENCY & UNIFORMITY TASK FORCE

Supporting a task force of providers, payers and government representatives in developing a uniform set of insurance codes and payment rules aimed at reducing costs and administrative redundancies, as required under HB10-1332.

GRANT TIMEFRAME: 2011-2013
GRANT AMOUNT: \$25,000
CONTACT: Laurel Petralia

OFFICE OF THE COLORADO GOVERNOR

Supporting a position in the Colorado Governor's Policy Office to assist with the implementation of federal laws that increase access to health for all Coloradans.

GRANT TIMEFRAME: 2007-2012
GRANT AMOUNT: \$445,280
CONTACT: Matt Sundeen

PROJECT HEALTH COLORADO

Building public will to help achieve access to health through a unique blend of grassroots strategies and an overarching communications campaign aimed at increasing awareness, understanding and support for making health coverage and health care work better for every Coloradan, in partnership with the Colorado Health Foundation.

GRANT TIMEFRAME: 2010-2013
GRANT AMOUNT: \$9,896,000
CONTACT: Scott Downes

SOUTHERN COLORADO COLLABORATIVE (COLORADO STATE UNIVERSITY)

Helping members of Colorado's south and southeastern communities to identify their health needs and advocate for improved access to health, in partnership with CSU-Pueblo's Hasan School of Business, Action 22 Foundation, the San Luis Valley Immigrant Resource Center, and the Center for Immigrant and Community Integration, Catholic Charities Diocese of Pueblo.

GRANT TIMEFRAME: 2008-2011
GRANT AMOUNT: \$200,000
CONTACT: Matt Sundeen

STRATEGIC ADVOCACY FUND

Informing debate about key policy issues that affect access to health for Coloradans through a collaboration of the Bell Policy Center, Colorado Center on Law and Policy, Colorado Children's Campaign and Colorado Coalition for the Medically Underserved.

GRANT TIMEFRAME: 2011-2012
GRANT AMOUNT: \$200,000
CONTACT: Matt Sundeen

UNIVERSITY OF DENVER – STATE FISCAL STUDY

Supporting a comprehensive study of state and local government financing in Colorado to inform and improve the state's ability to expand health coverage and care.

GRANT TIMEFRAME: 2010-2011
GRANT AMOUNT: \$25,000
CONTACT: Matt Sundeen

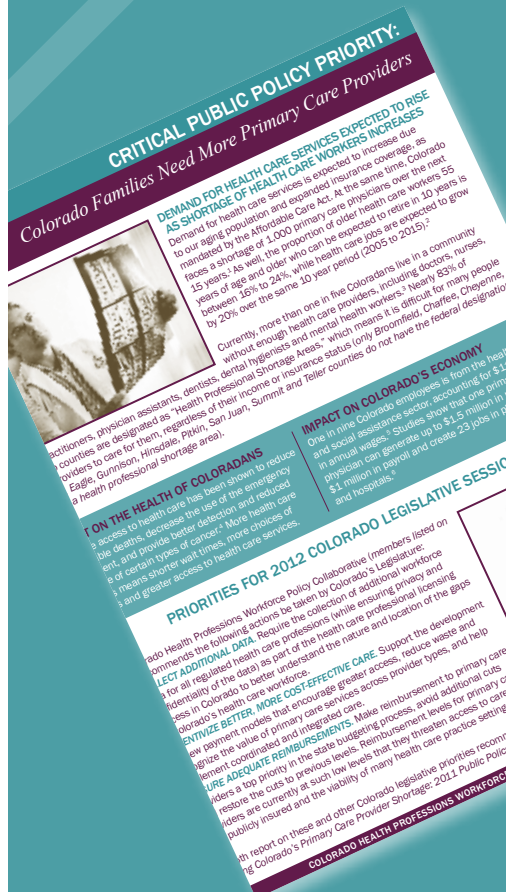
Grants



HEALTH CARE SERVICES & SYSTEMS

In 2011, Colorado Trust grant strategies helped to strengthen the ability of health care delivery sites and providers to serve uninsured, and publicly- and privately-insured Coloradans; improve systems, policies and programs to support continuous enrollment in public health coverage; and address the insufficient availability and numbers of health care providers by:

- Helping more Colorado children receive health care services by enrolling eligible but uninsured children and youth in Medicaid and Child Health Plan Plus (CHP+) and increasing the service capacity of safety net clinics
- Training and recruiting health professionals, especially to serve racial and ethnic minorities and residents in rural areas of the state
- Increasing the ability of health care providers and organizations to provide culturally competent health care services.
- Coordinating the delivery of health care services across multiple providers and health care settings – including primary, specialty, behavioral and oral care



Grants

HEALTH CARE SERVICES & SYSTEMS STORY



“
*People who are
undocumented often
have children who are
U.S. citizens and
eligible for services,
and we need to ensure
they are not left behind
without access to
health care and
other basic needs.*”

**JULISSA SOTO,
PROGRAM DIRECTOR,
AMERICAN DIABETES
ASSOCIATION, POR TU FAMILIA**

» OVERCOMING FEARS AND GETTING CARE

“People who are undocumented often have children who are U.S. citizens and eligible for services, and we need to ensure they are not left behind without access to health care and other basic needs. So many families don’t know about the services available to them or how to access them,” said Julissa Soto, Program Director of the American Diabetes Association’s (ADA) Por Tu Familia (For Your Family) Ventanillas de Salud (Windows to Health) program. “This program has helped us... overcome the fear in the community that prevents people from seeking the care they need, and helps them maneuver through our health care system.”

The ADA was one of 19 grantees under The Colorado Trust’s \$3.4 million Expanding Outreach and Enrollment for Children & Youth strategy. These grantees used innovative, community-based, multi-ethnic outreach methods to identify and enroll eligible but uninsured children and youth statewide in Medicaid and Child Health Plan Plus (CHP+). Grantees included countywide collaborations; after-school programs; clinics; agencies serving low-income families, homeless families and abused children; a school district; and an affordable housing provider.

The need is critical with more than 112,000 uninsured children in Colorado (Colorado Health Access Survey, 2011). According to the Colorado Health Institute, some 48,000 children are income-eligible for Medicaid coverage but are not enrolled, and an additional 31,000 are eligible for CHP+ but not enrolled. These figures are conservative as they do not include undocumented children,

or children who are ineligible because their family’s income exceeds the eligibility thresholds of the two programs.

Through the Ventanillas de Salud program, promotoras are available at the Mexican Consulate to assist families with eligibility determination and application assistance, and provide referrals to health care services. The promotoras also travel with the consulate’s mobile van to provide similar services throughout the state.

Soto said the ADA saw this incredible need and supported the creation of Windows to Health because access to health is so important to both prevent and manage diabetes. Over the past two years, the ADA enrolled 786 children in Medicaid and CHP+, distributed information regarding access to local health services and enrollment into public health programs to 3,150 underserved and uninsured Mexican families, and held 210 health education sessions on the topics of nutrition and preventive care.

“Windows to Health is a light at the end of the tunnel and gives hope to so many people,” she said. “I am incredibly grateful for the work it is doing in our community.”

As a result of the program’s success, the ADA has been able to sustain this effective program after Trust support ended.

Grants

HEALTH CARE SERVICES & SYSTEMS GRANTEES

AFFORDABLE CARE ELIGIBILITY COORDINATOR (THE COLORADO HEALTH FOUNDATION)

Partnering with the Colorado Health Foundation to support consulting services to the State of Colorado necessary to develop a strategic plan to improve state eligibility determination, verification and enrollment systems, as required under the Affordable Care Act.

GRANT TIMEFRAME: 2011-2012
GRANT AMOUNT: \$28,963
CONTACT: Deidre Johnson

CAVITY FREE AT THREE

Through the Colorado Area Health Education Center, preventing oral disease in young children statewide by changing delivery systems, and strengthening the capacity of safety nets to provide preventive oral health services to high-risk pregnant women and their babies (up to age 3).

GRANT TIMEFRAME: 2008-2011
GRANT AMOUNT: \$300,000
CONTACT: Deidre Johnson

CAVITY FREE AT THREE – EVALUATION

Researchers at Denver Health and the University of Colorado School of Medicine are conducting a randomized, controlled trial to determine the impact of Cavity Free at Three on the prevalence of dental caries in children less than three years of age.

GRANT TIMEFRAME: 2009-2012
GRANT AMOUNT: \$100,000
CONTACT: Nancy Csuti

CAVITY FREE AT THREE – PHASE TWO

Recruiting private dentists in Colorado who do not currently accept Medicaid clients to serve this population, and training dental providers to care for young children and pregnant women.

GRANT TIMEFRAME: 2011-2014
GRANT AMOUNT: \$300,000
CONTACT: Deidre Johnson

CLINICNET

Helping non-federally qualified health centers in Colorado build their administrative and service capacity and ability to advocate for community-funded clinics.

GRANT TIMEFRAME: 2008-2011
GRANT AMOUNT: \$300,000
CONTACT: Deidre Johnson

COLORADO AREA HEALTH EDUCATION CENTERS (UNIVERSITY OF COLORADO FOUNDATION)

Encouraging rural and underserved high school students to explore health profession careers, and administering a health care scholars program to graduate students in health professions education and training who opt to practice in rural or other underserved sites.

GRANT TIMEFRAME: 2008-2012
GRANT AMOUNT: \$3,030,000
CONTACT: Laurel Petralia

COLORADO CENTER FOR NURSING EXCELLENCE

Building the state's health professions workforce through the Nursing Faculty Retention and Recruitment Program, including a nursing faculty educational loan repayment program.

GRANT TIMEFRAME: 2008-2011
GRANT AMOUNT: \$1,175,000
CONTACT: Laurel Petralia

COLORADO CENTER FOR NURSING EXCELLENCE – CARE AND CAREER TRANSITIONS

Improving transitions of care by strengthening home-health nursing clinical and leadership competencies, and putting in place quality and patient safety improvements.

GRANT TIMEFRAME: 2010-2013
GRANT AMOUNT: \$50,000
CONTACT: Laurel Petralia

COLORADO CENTER FOR NURSING EXCELLENCE – EXPANDING ADVANCED NURSING SKILLS FOR LEADING QUALITY INITIATIVES

Building on evidence gained from a HRSA-funded nurse leadership program to expand the leadership skills of some 140 frontline nurses to implement quality initiatives that improve patient care statewide.

GRANT TIMEFRAME: 2008-2011
GRANT AMOUNT: \$380,000
CONTACT: Laurel Petralia

HEALTH CARE SERVICES & SYSTEMS GRANTEES

**COLORADO CHILDREN'S
HEALTHCARE ACCESS PROGRAM**

Providing support services that enable and encourage private pediatric and family practices to devote at least 10% of their practice to publicly insured children.

GRANT TIMEFRAME: 2008-2011

GRANT AMOUNT: \$300,000

CONTACT: Deidre Johnson

**COLORADO CHILDREN'S
HEALTHCARE ACCESS
PROGRAM – HEALTHY
MOTHERS PROJECT**

Providing support services that enable and encourage private obstetrical and family practices to offer comprehensive prenatal care to publicly insured pregnant women.

GRANT TIMEFRAME: 2010-2011

GRANT AMOUNT: \$140,156

CONTACT: Deidre Johnson

**COLORADO DEPARTMENT
OF HEALTH CARE POLICY
AND FINANCING –
OUTREACH SPECIALIST**

Through a new staff position, providing technical support to community-based organizations working to increase outreach to and enrollment of children who are eligible but not enrolled in Medicaid or CHP+.

GRANT TIMEFRAME: 2008-2011

GRANT AMOUNT: \$150,000

CONTACT: Deidre Johnson

**COLORADO DEPARTMENT
OF HEALTH CARE POLICY
AND FINANCING – SYSTEM
IMPROVEMENTS**

Strengthening staff, planning, outreach and public education efforts to support the development and implementation of health care system improvements in Colorado, and establishing the Center for Improving Value in Health Care to identify and pursue strategies for quality improvement, cost containment and improved population health.

GRANT TIMEFRAME: 2007-2011

GRANT AMOUNT: \$625,277

CONTACT: Laurel Petralia

**COLORADO DEPARTMENT
OF PUBLIC HEALTH AND
ENVIRONMENT**

Working to improve state-level coordination and alignment to support the work of Early Childhood Health Integration grantees and to further the development of the community Medical Home concept as it relates to early childhood systems.

GRANT TIMEFRAME: 2008-2013

GRANT AMOUNT: \$506,344

CONTACT: Deidre Johnson

**COLORADO DEPARTMENT
OF PUBLIC HEALTH AND
ENVIRONMENT, OFFICE OF
PRIMARY CARE – COLORADO
HEALTH SERVICE CORPS
EDUCATIONAL LOAN
FORGIVENESS**

Repaying all or a portion of the educational loan debt of primary care health professionals who agree to practice in an underserved community with a known shortage of providers.

GRANT TIMEFRAME: 2010-2012

GRANT AMOUNT: \$304,000

CONTACT: Laurel Petralia

**COLORADO RURAL HEALTH
CENTER – COLORADO PROVIDER
RECRUITMENT PROGRAM**

Administering the Colorado Provider Recruitment Program to recruit and retain health care providers to work in rural and underserved communities.

GRANT TIMEFRAME: 2009-2012

GRANT AMOUNT: \$144,000

CONTACT: Laurel Petralia

**COUNTY OF BOULDER –
COLORADO PEAK**

Development and implementation of a statewide train-the-trainer model to promote and support use of the new Colorado Program Eligibility and Application Kit, an online application to help individuals and families apply online for medical and food assistance benefits.

GRANT TIMEFRAME: 2010-2012

GRANT AMOUNT: \$200,000

CONTACT: Deidre Johnson

HEALTH CARE SERVICES & SYSTEMS GRANTEES

**EARLY CHILDHOOD
HEALTH INTEGRATION**

Supporting the state's network of Early Childhood to better integrate health services into their local early childhood system development efforts.

GRANT TIMEFRAME: 2008-2014
GRANT AMOUNT: \$5,000,000
CONTACT: Deidre Johnson

**EARLY CHILDHOOD HEALTH
INTEGRATION – EVALUATION**

Examining the extent to which the councils integrate health services into their local early childhood systems, as well as lessons learned about factors that contribute to systems change.

GRANT TIMEFRAME: 2010-2014
GRANT AMOUNT: \$350,000
CONTACT: Phillip Chung

**EARLY CHILDHOOD
HEALTH INTEGRATION –
COLLABORATION TECHNICAL
ASSISTANCE PROJECT**

Providing supplemental technical assistance to Early Childhood Councils and other Children's Access to Health Grantees to improve collaboration and create strategic alliances.

GRANT TIMEFRAME: 2010-2011
GRANT AMOUNT: \$30,000
CONTACT: Deidre Johnson

EQUALITY IN HEALTH

Increasing the ability of organizations and educational institutions to provide culturally appropriate health care services to help reduce racial and ethnic health disparities in Colorado.

GRANT TIMEFRAME: 2005-2012
GRANT AMOUNT: \$13,100,000
CONTACT: Chris Armijo

**EQUALITY IN HEALTH -
EVALUATION**

Examining the link between the increases in cultural competency within grantee organizations and a reduction of health disparities.

GRANT TIMEFRAME: 2006-2011
GRANT AMOUNT: \$944,298
CONTACT: Nancy Csuti

**EXPANDING CHILDREN'S
ACCESS TO HEALTH CARE**

Expanding the ability of 13 community health clinics and local public health agencies to provide timely preventive, primary, oral and behavioral health care for children in medically underserved areas.

GRANT TIMEFRAME: 2008-2011
GRANT AMOUNT: \$4,200,000
CONTACT: Deidre Johnson

**EXPANDING OUTREACH
AND ENROLLMENT FOR
CHILDREN AND YOUTH**

Using innovative, community-based, multi-ethnic outreach strategies through 19 grantees to identify and enroll eligible, but uninsured, children and youth in Medicaid and CHP+.

GRANT TIMEFRAME: 2008-2011
GRANT AMOUNT: \$3,400,000
CONTACT: Deidre Johnson

**HEALTHTEAMWORKS –
PATIENT-CENTERED
MEDICAL HOME PILOT**

In partnership with The Commonwealth Fund, implementing a patient-centered medical home demonstration pilot in 16 medical practices in Colorado to improve primary care delivery and costs by aligning high quality, coordinated care with financial incentives.

GRANT TIMEFRAME: 2009-2012
GRANT AMOUNT: \$1,600,000
CONTACT: Laurel Petralia

**HEALTHTEAMWORKS –
PATIENT-CENTERED MEDICAL
HOME PILOT EVALUATION**

Through the Harvard University School of Public Health, evaluating patient-centered medical home pilots in Colorado and six other states to identify outcomes related to patient and physician experiences, changes in quality of care measures and cost.

GRANT TIMEFRAME: 2008-2012
GRANT AMOUNT: \$200,000
CONTACT: Nancy Csuti

**IDENTIFYING OUTREACH
AND ENROLLMENT
RESOURCES AND GAPS**

Developing an interactive web-based map of health care coverage outreach and enrollment application assistance sites in Colorado to identify gaps, support referrals to enrollment services and provide stakeholders with a dynamic, state-level analysis of outreach resources.

GRANT TIMEFRAME: 2010-2011
GRANT AMOUNT: \$66,302
CONTACT: Nancy Csuti

HEALTH CARE SERVICES & SYSTEMS GRANTEES

IMMIGRANT INTEGRATION

Supporting immigrants and established residents in working together to build healthy, cohesive communities.

GRANT TIMEFRAME: 2003-2011

GRANT AMOUNT: \$10,733,504

CONTACT: Laurel Petralia

OFFICE OF SUICIDE PREVENTION – GATEKEEPER TRAINING PROGRAM

Training individuals throughout Colorado to be suicide prevention “gatekeepers” – those likely to come into contact with individuals who may be at risk for suicide – who can connect the suicidal person to the resource(s) he/she needs.

GRANT TIMEFRAME: 2011

GRANT AMOUNT: \$14,760

CONTACT: Chris Armijo

PARTNERSHIPS IN HEALTH

Improving the coordination of health services at the community level through partnerships that build, strengthen and sustain the infrastructure of Colorado communities.

GRANT TIMEFRAME: 2006-2012

GRANT AMOUNT: \$8,600,000

CONTACT: Chris Armijo

PARTNERSHIPS IN HEALTH – EVALUATION

Conducting a series of case studies to better understand how local health collaborations impact the provision of community health services and the local health systems in which those services are provided.

GRANT TIMEFRAME: 2006-2011

GRANT AMOUNT: \$900,000

CONTACT: Phillip Chung

REGIS UNIVERSITY – DOCTOR OF NURSING PRACTICE PROGRAM

Preparing practicing nurses to work with other health care professionals toward more efficient, effective and interdisciplinary health care systems – from assessing and improving quality of care to improving health outcomes, shaping health care policy, and developing new models of health care delivery.

GRANT TIMEFRAME: 2010-2011

GRANT AMOUNT: \$73,000

CONTACT: Laurel Petralia

THE ROCKY MOUNTAIN YOUTH CLINICS

Supporting the provision of consistent primary and dental health care to children in their communities – particularly for families that have difficulty accessing health care through the traditional system – through clinics, mobile health care vans that serve rural and metro-area counties, and by establishing and servicing new school-based health centers.

GRANT TIMEFRAME: 2008-2011

GRANT AMOUNT: \$900,000

CONTACT: Deidre Johnson

SET OF COLORADO SPRINGS - SET FAMILY MEDICAL CLINICS

Expanding services to provide a medical home for low-income and homeless clients, and helping the centers apply for designation as a Federally Qualified Health Center Look Alike.

GRANT TIMEFRAME: 2010-2012

GRANT AMOUNT: \$300,000

CONTACT: Deidre Johnson

UNIVERSITY OF COLORADO DENVER, COLLEGE OF NURSING – QUALITY AND SAFETY EDUCATION FOR NURSES

Providing technical assistance to nurse education programs statewide to incorporate six quality and safety competencies, including patient-centered care, teamwork and collaboration, evidence-based practice, quality improvement, safety and informatics (i.e., using information and technology to share knowledge, mitigate errors and support decision making).

GRANT TIMEFRAME: 2009-2011

GRANT AMOUNT: \$115,119

CONTACT: Laurel Petralia

UNIVERSITY OF COLORADO DENVER HEALTH SCIENCES CENTER, DEPARTMENT OF HEALTH AND BEHAVIORAL SCIENCES

Evaluating public insurance outreach and enrollment programs in community-based organizations to determine their impact on enrollment, retention and utilization of Colorado's public health insurance programs.

GRANT TIMEFRAME: 2009-2012

GRANT AMOUNT: \$987,500

CONTACT: Phillip Chung

Grants



HEALTH & WELL-BEING

Since 1985, The Colorado Trust has worked closely with communities across the state on a wide array of efforts to advance the health and well-being of the people of Colorado. In 2011, these diverse strategies included:

- Recognizing and supporting outstanding leadership in communities by honoring a current grantee with the John R. Moran, Jr. Leadership Award
- Supporting and participating in the twice yearly, Community Resource Center-hosted Rural Philanthropy Days events that connect funders and nonprofit organizations to discuss and address critical needs in rural communities across Colorado
- Acknowledging the milestone of The Colorado Trust's 25th year by providing grant support to strengthen the work of several nonprofit organizations and groups working across Colorado to improve health care services and systems for children.



Grants

HEALTH & WELL-BEING STORY



» NORTHSIDE CHILD HEALTH CENTER RECEIVES AWARD

The Northside Child Health Center is the recipient of the 2011 John R. Moran, Jr. Leadership Award. The annual award of \$25,000 is made in recognition of exemplary leadership by a current grantee of The Colorado Trust.

The Northside Child Health Center in Montrose provides more than 800 children from birth through high school with primary, behavioral and oral health care, as well as nutritional information. With 78% of Northside's students qualifying for free or reduced meals, and too few health care providers in the area to care for residents, many children and their families had a difficult time accessing health care services before the school-based health clinic opened in 2007.

"Only a healthy child has the ability to fully participate in a classroom – to learn, to develop and, ultimately, to achieve his or her full potential," said Ned Calonge, MD, President and CEO of The Colorado Trust.

Northside is one of 26 nonprofit organizations and educational institutions working to reduce racial and ethnic health disparities in Colorado through The Trust's Equality in Health initiative. These grantees are building their ability to provide culturally effective health education and health care services.

Northside has helped an array of community partners with disparate views come together to realize their dream of creating a trusted health care resource for preschool and elementary school students. The school's clinic serves the district's highest percentage of uninsured, underinsured and low-income students, and its strong commitment to creating a culturally-competent clinic and staff is commendable.

According to the Colorado Department of Public Health and Environment's School-based Health Center Program, more than 26,000 youth received health care services at 45 school-based health centers during the 2009-2010 school year. The majority operate in schools where a high percentage of the student population is either uninsured or underinsured. Students never are turned away because of an inability to pay for their care, and most sites provide enrollment assistance with Medicaid and the Children's Health Plan Plus (CHP+). Also, a recent study conducted by Emory University showed that school-based health centers lowered the rates of hospitalizations and inappropriate emergency room usage in the youth they served, ultimately decreasing costs to Medicaid and third-party payers. Additionally, the ability to provide care to students in the school setting decreases parents' time away from work and students' time away from the classroom.

"Only a healthy child has the ability to fully participate in a classroom – to learn, to develop and, ultimately, to achieve his or her full potential."

**NED CALONGE, MD,
PRESIDENT AND CEO,
THE COLORADO TRUST**

Grants

HEALTH & WELL-BEING GRANTEES

JOHN R. MORAN, JR. LEADERSHIP AWARD

In honor of John R. Moran, Jr.'s long-time leadership of The Colorado Trust, a special fund of \$250,000 established the John R. Moran, Jr. Grantee Leadership Award. Since 2007, one current Trust grantee has been selected annually to receive \$25,000 in recognition of outstanding leadership to advance the health and well-being of the people within the community the grantee serves.

GRANT TIMEFRAME: 2007-2017

GRANT AMOUNT: \$250,000

CONTACT: Gay Cook

RURAL PHILANTHROPY DAYS

Supporting and participating in the twice yearly, Community Resource Center-hosted Rural Philanthropy Days events that connect funders and nonprofit organizations to discuss and address critical needs in rural communities across Colorado.

GRANT TIMEFRAME: 2011

GRANT AMOUNT: \$58,000

CONTACT: Laurel Petralia

25TH ANNIVERSARY

To acknowledge the milestone of The Colorado Trust's 25th year, providing grant support to strengthen the work of several nonprofit organizations and groups working across Colorado to improve health care services and systems for children.

- All Kids Covered
- Bright Futures for Early Childhood
- Colorado Medical Home Initiative
- Denver Health-South High School-based Health Center
- Eagle Care Medical Clinic
- Family Medicine Center
- Northwest Colorado Visiting Nurse Association
- Pueblo City-County Health Department
- Southwest Open School's School-based Health Center
- Summit Community Care Clinic

GRANT TIMEFRAME: 2010-2012

GRANT AMOUNT: \$250,000

CONTACT: Deidre Johnson

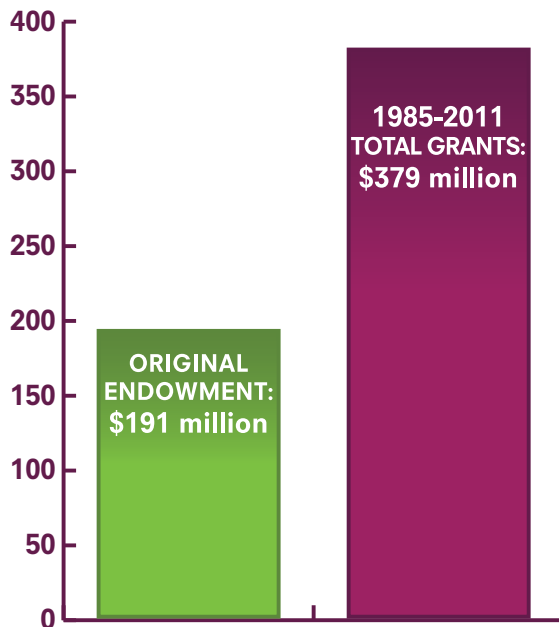


Financials

The Colorado Trust strives to conduct its financial affairs according to the highest ethical standards, and to maintain or increase the real value of its investments in perpetuity to serve the needs of the people of Colorado today and into the future. Our investments are overseen by a committee of our Board of Trustees, and implemented by the Treasurer on the Board of Trustees, our President and CEO, and Vice President and CFO.

The Trust's original endowment of \$191 million was received from the sale of the PSL Healthcare Corporation in 1985. From its inception through 2011, grants totaling \$379 million have been made to grantees across Colorado.

In millions



Please visit www.coloradotrust.org to view The Colorado Trust's Form 990-PF and its 2011 Audited Financial Statements.

Financials

THE COLORADO TRUST STATEMENTS OF FINANCIAL POSITION | DECEMBER 31, 2011 AND 2010

ASSETS	2011	2010
Cash and cash equivalents	\$565,772	\$303,855
Accounts receivable	5,319	319
Contributions receivable	668,000	1,334,000
Interest and real estate distributions receivable	1,607,792	1,191,079
Prepaid and other expenses	17,191	14,792
Investments	375,458,422	407,24,983
Cash held in custody for others	72,938	93,109
Property and equipment:		
Building improvements	18,872	18,872
Machinery and equipment	665,211	585,787
Furniture and fixtures	351,810	351,810
	1,035,893	956,469
Accumulated depreciation	(791,343)	(666,975)
Property and equipment, net	244,550	289,494
Investments held in under deferred compensation agreements	419,141	389,756
TOTAL ASSETS	<u>\$379,059,125</u>	<u>\$410,863,387</u>
LIABILITIES & NET ASSETS	2011	2010
Accounts payable and accrued expenses	\$25,028	\$52,531
Other accrued liabilities	257,619	249,412
Deferred gain on sale-leaseback	4,014,419	4,264,019
Cash held in custody for others	72,938	93,109
Grants payable	7,095,001	14,167,098
Deferred compensation	419,141	389,756
Deferred excise tax payable	23,953	388,759
Excise tax payable	75,965	43,995
TOTAL LIABILITIES	<u>11,984,064</u>	<u>19,648,679</u>
Net assets:		
Unrestricted	366,407,061	389,880,708
Temporarily restricted	668,000	1,334,000
TOTAL LIABILITIES & NET ASSETS	<u>\$379,059,125</u>	<u>\$410,863,387</u>

Financials

THE COLORADO TRUST STATEMENTS OF ACTIVITIES AND CHANGES IN NET ASSETS FOR THE YEARS ENDED DECEMBER 31, 2011 AND 2010

UNRESTRICTED REVENUES, GAINS & SUPPORT:	2011	2010
Interest and dividend income	\$8,672,803	\$8,759,325
Net realized and unrealized gain on investments	(21,254,749)	38,921,522
Income from real estate activities	750,345	746,225
Other income	10,723	57,011
Investment management fees	(750,686)	(976,868)
Net assets released from restriction	<u>666,000</u>	<u>666,000</u>
TOTAL UNRESTRICTED REVENUES, GAINS & SUPPORT	<u>(\$11,905,564)</u>	<u>\$48,173,215</u>

EXPENSES:	2011	2010
Program services:		
Access to Health	\$4,811,862	\$11,727,168
Accessible and Affordable Health Care Initiatives	184,313	430,751
Strengthening Families Initiatives	63,431	277,088
Other grant expenses	2,709,204	3,200,788
Returned grants	(561,635)	(195,608)
Grant administration	<u>3,230,147</u>	<u>2,772,631</u>
TOTAL PROGRAM SERVICES	*\$10,437,322	**\$18,384,499
Management and general	1,217,981	1,080,732
Excise tax expense	<u>(87,220)</u>	<u>479,288</u>
TOTAL EXPENSES	<u>\$11,568,083</u>	<u>\$19,944,519</u>

Decrease in unrestricted net assets	<u>(23,473,647)</u>	<u>28,228,696</u>
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Temporarily Restricted Support:

Contributions		2,000,000
Net assets released from restriction	<u>(666,000)</u>	<u>(666,000)</u>
Decrease in temporarily restricted net assets	<u>(666,000)</u>	<u>1,334,000</u>
Change in Net Assets	<u>(24,139,647)</u>	<u>29,562,696</u>
Net Assets at Beginning of Year	<u>391,214,708</u>	<u>361,652,012</u>

NET ASSETS AT END OF YEAR	<u>\$367,075,061</u>	<u>\$391,214,708</u>
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*Accrual method; actual cash payments for 2011 grants totaled \$12,447,021.

**Accrual method; actual cash payments for 2010 grants totaled \$19,789,822.



LEFT TO RIGHT: Colleen Schwarz; John Hopkins; Jennifer Paquette; Gail Schoettler, PhD; Rev. R.J. Ross; William Wright, MD; Patricia Baca, EdD; Ned Calonge, MD; Alan Synn, MD; Reginald L. Washington, MD

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Cara Lawrence

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LEFT TO RIGHT: *Tara Spahr, Rachel Mondragon, Gay Cook, Chris Armijo, Alisa Bourne, Mary Ann Davis and Jill Johnson.*



LEFT TO RIGHT: *Deidre Johnson, Jenny Lehman, Christie McElhinney, Heidi Holmberg, Joanne Johnson, Scott Doves, Laurel Petralia and Debbie DeMuth.*



LEFT TO RIGHT: *Gwyn Barley, Phil Chung, Michele Chader, Matt Sundeen, Maggie Frasure, Ned Calonge, Nancy Csuti and Richard Stromp.*

** With gratitude to the staff members who formerly served The Colorado Trust:
Sabrina D'Agosta, Bridget Monahan, John Samuelson and Lori Vettraino.*



**THE
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