Helping Children Communicate!









2010 State of the Foundation Report

Scottish Rite Foundation of Colorado a 501(c)(3) public charity www.scottishritefoundation.org



Message from the Sovereign Grand Inspector General in Colorado and President of the Scottish Rite Foundation of Colorado

The Honorable Stephen M. Munsinger, 33°

I am pleased to present the 2010 State of the Foundation Report for the Scottish Rite Foundation of Colorado – commonly referred to as Colorado RiteCare. This report summarizes our work with childhood language disorders giving special focus on the performance of our eleven speech-language partners in Colorado. The Foundation's work is an important way in which Masons help the community through the Masonic teaching of charity.

At the end of 2010 our net assets totaled \$20.9 million. During the year we distributed \$1.2 million in grants to our RiteCare partners – monies which helped make it possible for children to receive speech-language care.

Three significant items regarding our work in 2010 are worthy of special mention.

- ✓ Colorado RiteCare enabled 1,008 children to receive speech-language services in 20 communities.
- ✓ Colorado RiteCare and the Masonic Fraternity awarded \$20,000 in scholarships four \$5,000 scholarships for graduate work in speech-language pathology.
- ✓ Colorado RiteCare administered its statewide program with 5.4 percent overhead.

This report provides information about this remarkable program of service to Colorado families. As you review these pages please keep in mind that about 10 percent of all children are at-risk for some type of speech-language disorder. Whether it be delayed speech development, autism, dyslexia, or many of the other speech-language disorders, Colorado RiteCare remains faithful to its mission and vision of striving to provide every child in Colorado with speech-language disorders the opportunity to receive treatment and care.

On behalf of our Trustees, we are honored to be committed to this work and to be associated with our outstanding partners who deliver the speech-language services. We all thank our many supporters and friends for helping make this work possible – now and in the future.

Sincerely,

Stephen M. Mussinger, 33°

Sovereign Grand Inspector General in Colorado



WHAT WE DID IN 2010

Scottish Rite Foundation of Colorado

1370 Grant Street
Denver, Colorado 80203-2347
303-861-2410
www.scottishritefoundation.org

RiteCare Service Profile

- ▶ \$30.9 million spent on speech-language services between 1953 and 2010 \$1.2 million in 2010
- ▶ 20 Colorado communities served by 11 RiteCare partners with our financial support
- **▶** 15,569 children served to date



2010 donor gifts totaled \$195,000

CHILDREN
SERVED IN 2010

1,008 children

Our Donors Make This Work Possible

- Denver and North/Northeast 532 children
- Colorado Springs and South/Southeast 95 children
- Grand Junction and West/Southwest 381 children
- ► More than \$550,000 raised towards meeting the Architects of Care Fundraising campaign's goal of \$1 million helping the Foundation advance speech therapy and related services in Colorado

The Scottish Rite Foundation of Colorado completed 57 years of service in 2010

Overhead Rate of 5.38% in 2010

The Scottish Rite Foundation of Colorado is a 501(c)(3) public charity, managed by a 7-member Board of Trustees. The Sovereign Grand Inspector General in Colorado - Honorable Stephen M. Munsinger, 33° - serves as its President and Chief Executive Officer.

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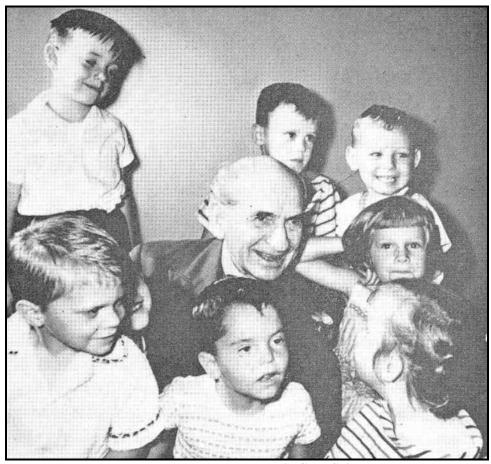
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Home and Birthplace of the Scottish Rite Foundation of Colorado



Denver Consistory
Ancient and Accepted Scottish Rite of Freemasonry
1370 Grant Street
Denver, Colorado



Judge Haslett P. Burke and RiteCare Children ca 1953 The Children's Hospital

Judge Burke was then-Sovereign Grand Inspector General in Colorado and the first president of the Scottish Rite Foundation of Colorado. At the time the Judge served on the Colorado Supreme Court, having been a former Chief Justice on several occasions.

2010 State of the Foundation Report

Introduction

The Scottish Rite Foundation of Colorado (Foundation) was established in 1953 by Scottish Rite Masons in Denver, Colorado as a not-for-profit corporation. The Foundation is approved by the Internal Revenue Service as a IRS Code Section 501(c)(3) public charity. The IRS approval letter, issued in 1954, was reissued in August 2006.

The Foundation was established to provide financial assistance to help families of children with language disorders receive clinical therapy treatment. This is now known nationally and in Colorado as the RiteCare Childhood Language Program. The Colorado RiteCare Program is the first program of its kind in the United States. Since 1953, all States in the Southern Jurisdiction of the Scottish Rite – to which Colorado belongs and which includes 35 States and the District of Columbia – have each organized a RiteCare Childhood Language Program. The Scottish Rite Foundation of Colorado is also a leader in the field by being one of the first organizations in the United States to promote speech and language therapy for preschool-age children.

The Foundation employs no professional caregivers and has no clinical infrastructure. All therapy and related services are provided by professionally qualified and certified speech-language pathologists and learning specialists. The Foundation provides grants to partner organizations to defray the costs that would otherwise be charged to families. The partners are community-based organizations most of which are not-for-profit hospitals.



Founding Father William G. Schweigert, 33°

Financial assistance applications are made directly to the partner clinic by the applying family and are jointly reviewed by the clinic director and a Foundation committee appointed specifically for this purpose by the President of the Foundation's Board of Trustees. The Foundation's appraisal philosophy affirms the importance of family participation by financially contributing to the care of their child, even though the family's contribution may be minimal. The determination of the amount of the Foundation's financial assistance is based on a graduated scale related to family income and

need. In addition, the assistance is provided after all other sources of financial support are exhausted.

The Foundation's operational characteristics include:

- 1. Comprehensive speech-language therapy services
- 2. Community-based partners
- 3. Statewide coverage
- 4. Professionally certified speech pathologists employed by partnering organizations
- 5. Focus on preschool-age children
- 6. Professionally managed RiteCare clinics, centers, and Foundation operations
- 7. Overhead cost efficiency

Speech therapy and related services are delivered by nationally certified speech-language pathologists, learning specialists, and related professionals. Certification requires a graduate college degree in the specialty field. More than 100 speech pathologists and learning specialists are employed by the Foundation's partners in Colorado. Each partnering organization has established credentialing requirements for its professional staff of caregivers.

Service is typically provided to children with disabilities – without regard to race, color, religion, gender, or national origin. Disabilities may include language delay, hearing loss, cleft lip and palate, autism spectrum disorder, Down syndrome, brain injury, dyslexia, voice disorders, fluency dysfunction and other disorders of speech and language development.

Scottish Rite Foundation of Colorado Governance and Management



L to R: Vern Ingraham, Lee Schlessman, Steve Munsinger, Karl Hinkle, Rick Frohlick, Deborah Hayes, Gerry Ford, John Groves, Tom Magnuson

The Foundation is governed by a seven-member Board of Trustees which establishes policy and overall guidance for Foundation operations. The Board receives no compensation for time spent and services provided. At December 31, 2010, the Board consisted of the following individuals.

Stephen M. Munsinger, President (Denver)

John W. Groves, Vice President (Grand Junction)

Lee E. Schlessman, Treasurer (Denver)

Gerald A. Ford (Arvada)

Richard G. Frohlick (Denver)

Thomas R. Magnuson (a Longmont resident currently managing a bank in Kansas)

Karl J. Hinkle (Colorado Springs)

The day-to-day operations of the Foundation are the responsibility of the Executive Secretary, Vernon B. Ingraham (Denver).

The Foundation's flagship partner is Children's Hospital Colorado. Since 1953 grants to Children's Colorado totaled \$23 million (75 percent of all grants awarded by the Foundation). Deborah Hayes, Ph.D., chairs the Department of Audiology, Speech Pathology, and Learning Services at Children's Colorado. Since 1983 she has occupied this position and, as such, serves as an ex officio member of the Foundation's Board of Trustees. In 2003 the Foundation completed a \$2 million fundraising campaign to establish the *Kelley Family/Schlessman Family Scottish Rite Masons Chair in Childhood Lanaguage Disorders* at Children's Hospital Colorado. Dr. Hayes occupies this distinguished chair and as such has responsibility for coordinating all Foundation-supported RiteCare operations in Colorado.



RiteCare Child Memorial Hospital Colorado Springs

In addition, the Board has two standing committees to provide support for Foundation operations. These are the Finance Committee and the Long Range Planning Committee. The Finance Committee, comprised of three Trustees and one adhoc member (Executive Secretary), meets quarterly with the Foundation's investment portfolio managers. The Long Range Planning Committee, consisting of three Trustees and two adhoc members (Dr. Hayes and the Executive Secretary), meets at least annually to review and recommend strategic planning initiatives for the Board of Trustees' consideration. In 2010 the Foundation's administrative overhead rate was 5.4 percent, a direct reflection of the Board's stewardship and the operational efficiency of the RiteCare Childhood Language Program. See Exhibit C for more details.

Scottish Rite Foundation of Colorado Mission

The mission of the Scottish Rite Foundation of Colorado, as officially endorsed by the Board of Trustees, is to "enhance the quality of life for Colorado's children and their families by supporting high quality, collaborative programs for the prevention and treatment of childhood language disorders." The Foundation accomplishes this by:

- 1. Providing sustaining support to children, families, and communities for the prevention and treatment of childhood language disorders.
- 2. Helping partner-programs provide speech, language, and learning therapy for children; parent education; and family and community language enrichment programs.
- 3. Supporting student and professional education and training.

Scottish Rite Foundation of Colorado Vision

The vision of the Scottish Rite Foundation of Colorado, as officially endorsed by the Board of Trustees, is to "ensure that all Colorado children with language disorders have the opportunity to receive treatment and care."

RiteCare Partners

In 2010 the Scottish Rite Foundation of Colorado provided grants to 11 organizations providing either clinical therapy programs or early childhood language development programs. See Exhibit D for children served by each organization and Exhibit G for a list of Scottish Rite Foundation and RiteCare partner addresses and phone numbers. The partners who delivered services in 2010 include the following organizations.

Clinical Therapy Programs (listed in order by organization type and length of partnership)

Six hospital-based programs

- 1) Children's Hospital Colorado Aurora, Denver Metro Area, & Pueblo
- 2) St. Mary's Life Center Grand Junction
- 3) Memorial Hospital for Children Colorado Springs
- 4) Montrose Memorial Hospital Montrose
- 5) Sterling Regional MedCenter Sterling
- 6) Arkansas Valley Regional Medical Center La Junta

Two university-based programs

- 1) University of Northern Colorado Greeley
- 2) University of Colorado Boulder

One not-for-profit agency – Children's Speech and Reading Center – Fort Collins

Early Language Development Programs (listed in order by length of partnership)

Two not-for-profit preschool programs

- 1) The Piñon Project Cortez
- 2) Western Slope Head Start Grand Junction



RiteCare Partner Main Office Locations



RiteCare Child RiteCare Director Amy Brophy-Neilsen St. Mary's Life Center, Grand Junction



RiteCare Child Speech-Language Pathology Graduate Student University of Northern Colorado

The 2010 clinical therapy programs were offered at partnership locations including satellite clinics of certain partners – totaling 16 communities: Aurora, Boulder, Colorado Springs, Delta, Fort Collins, Grand Junction, Greeley, La Junta, Littleton, Loveland, Montrose, Parker, Pueblo, Ridgway, Sterling, and Westminster.

The 2010 early (preschool-age) language development programs were offered at partnership locations including associated preschool programs in outlying locations – totaling five communities: Cortez, Dolores, Dove Creek, Grand Junction, and Mancos.

Highlights of the Year 2010

The year 2010 saw a continuing recovery over the 2008/2009 downturn in the stock market and was highly successful with regard to the work of the Scottish Rite Foundation of Colorado and its RiteCare Childhood Language Program. See Exhibit F for a summary of partner annual report highlights. Foundation highlights for the year include:

- 1. Providing services to 1,008 children with financial support from the Scottish Rite Foundation of Colorado including speech therapy and/or related services for 756 children and early language and literacy services (Treasure Chest Program) for 252 children.
- 2. Awarding four scholarships of \$5,000 each to second-year graduate students at the University of Colorado Boulder and the University of Northern Colorado. Scholarships funded by the Foundation are awarded in the name of Dwight A. Hamilton, former Sovereign Grand Inspector General in Colorado and former President of the Foundation. Scholarships funded by the Colorado Masons' Benevolent Fund Association are given in the name of the Association. This is the main charitable arm of the Masonic Grand Lodge of Colorado which has partnered with the Foundation in this work since 2003.
- 3. Conducting outreach programs in partnership with the following RiteCare clinics: Children's Hospital Colorado in Aurora, St. Mary's Life Center in Grand Junction, UNC in Greeley, and CU in Boulder. This included discussions with speech-language pathology graduate students at both universities as well as presentations to Scottish Rite Reunion Classes in Denver, Colorado Springs, and Grand Junction.

4. Participating in special fundraisers for the Foundation such as the Pints Pub Scotch Tasting fundraiser – the fourth year this fundraiser has been generously hosted by Pints Pub.

Children Served

Since the Foundation's beginning in 1953, 15,569 children have been served through its RiteCare partners. For the 12 months ended December 31, 2010, the Foundation served 1,008 children in Colorado. See Exhibit D for more details.

	2010	<u>2001 - 2010</u>	<u> 1953 - 2010</u>
Denver and North/Northeast Colorado	532	4,098	11,258
Grand Junction and West/Southwest Colorado	381	2,486	3,047
Colorado Springs and South/Southeast Colorado	<u>95</u>	815	1,264
Total Children Served	1,008	<u>7,399</u>	15,569

The RiteCare program directors evaluate children's progress throughout Colorado by means of the Child Development Inventory. Based on an inventory of progress of 834 RiteCare children since the evaluation's inception in 2002, the most robust developmental gains are noted in the area of social-communicative behaviors. See Exhibit E for details.

Grants and Expenditures in Support of Colorado RiteCare

In 2010 grants to the RiteCare clinics/centers totaled \$1,227,966 representing 4.0 percent of total grants since 1953 and 5.9 percent of net assets as of December 31, 2010 (see Exhibit A).

	2010	Inception - 2010
Children's Hospital Colorado – Aurora	\$ 585,236	\$ 21,996,900
Children's Hospital Colorado Therapy Center – Pueblo	88,001	1,085,056
Parkview Hospital – Pueblo	-0-	905,817
St. Mary's Life Center – Grand Junction	155,000	2,418,324
Memorial Hospital for Children – Colorado Springs	71,808	1,419,626
Montrose Memorial Hospital – Montrose	80,639	974,721
Sterling Regional MedCenter – Sterling	688	12,566
Arkansas Valley Regional Medical Center – La Junta	4,175	24,956
University of Northern Colorado – Greeley	7,240	176,720
University of Colorado – Boulder	27,000	79,141
Children's Speech & Reading Center – Fort Collins	127,159	1,074,367
The Piñon Project – Cortez	54,020	351,900
Western Slope Head Start – Grand Junction	27,000	145,000
Let's Talk! Speech Therapy – Canon City	0-	588
Total Program Support	<u>\$1,227,966</u>	<u>\$ 30,665,682</u>

In 2010 the statewide average annual cost-per-child for direct services (therapy, parent education, etc.) was \$1,215 – a strong investment with substantial returns in language and communication development. Through our investment in their future, many children with disabilities such as language delay, hearing loss, cleft lip and palate, autism spectrum disorder,

Down syndrome, brain injury, dyslexia, voice disorders, fluency dysfunction, and other disorders of speech and language development received help that might not otherwise have been available.

Financial Trends

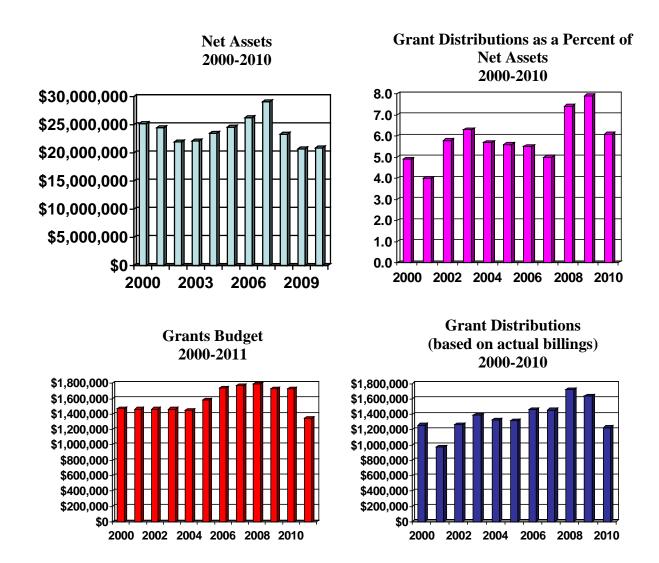
Total program expenditures in support of the Colorado RiteCare Childhood Language Program include, in addition to speech therapy and related services, the following: (1) Endowed Chair at Children's Hospital Colorado, (2) Capital Improvements such as the Early Language Intervention Room at the University of Northern Colorado and the Speech Therapy Group Room at Children's Hospital Colorado, (3) Equipment purchases for various clinics, and (4) the Graduate Scholarship awards. These expenditures are summarized as follows.

	2010	2001 - 2010	Inception - 2010
Speech Therapy and Related Services	\$1,227,966	\$ 14,710,123	\$ 27,753,515
Kelley Family/Schlessman Family			
Scottish Rite Masons Chair			
in Childhood Language Disorders	-	2,000,000	2,000,000
Capital Improvements	-	468,229	468,229
Equipment for Clinic Therapy Programs	-	100,000	570,167
Graduate Scholarships in Speech Pathology	20,000	90,000	90,000
Total Program Expenditures	<u>\$1,247,966</u>	<u>\$ 17,368,352</u>	<u>\$ 30,881,911</u>

During 2001-2010, the Foundation's net assets ranged from a low of \$20.7 million at the end of 2009, following an especially volatile stock market in 2008 and 2009, to a record high of \$29.1 million at the end of 2007. As shown in this report, net assets at December 31, 2010 total \$20.9 million (see Exhibits A and B).



RiteCare kid in technology session
Talking with Technology 2010 summer camp



These charts present trends since 2000 for grant budgets, grant distributions, and the end-of-year net asset base. They not only illustrate the Board of Trustees' dedication to sustaining support for Colorado RiteCare programs over a period of time, but also exemplify the Board's focus on rebuilding the Foundation's net asset base following the major stock market downturn in 2008 and 2009.

Fundraising Accomplishments in 2010

In 2010 the Foundation received cash gifts and donations, including pledges, totaling \$195,294 – with individual donations increasing over the previous year by \$126,773 or 576%.

	Total Gifts	Temporarily Restricted Gifts	ted Unrestricted	
Estates and Trusts Individual Donations Non-Masonic Organizations	\$ 30,021 148,773 <u>16,500</u> <u>\$ 195,294</u>	$\begin{array}{c} \$ & 0 \\ 8,985 \\ \underline{16,500} \\ \$ & 25,485 \end{array}$	\$ 30,021 139,788 0 \$ 169,809	

Temporary restrictions typically pertain to several purposes including certain gifts designated for the Architects of Care fundraising campaign; gifts designated for the Talking with Technology Camp and the First Steps Camp; and gifts for the Early Language Intervention Program (Treasure Chest Program).

While fundraising in 2010 continued to be disappointingly low, the year-end campaign generated a high participation rate and a near-record letter appeal drive. The Board of Trustees felt confident about the outlook for a continuing upward trend and at the February 2011 annual Board meeting they unanimously approved extending the Architects of Care fundraising campaign to a second phase thereby increasing the total fundraising goal to \$1.0 million. As of the preparation of this report at mid-year 2011, the campaign has generated gifts in cash and pledges exceeding \$550,000.

Recognition of Special Friends of the Foundation

The Scottish Rite Foundation of Colorado is deeply grateful to its many friends for their support in helping children with language disorders. Between January 2000 and December 2010 more than 3,500 financial gifts were made to the Foundation. Hundreds of donors are annually helping to make the Foundation's mission and vision become a reality for thousands of children in the future.

Several categories of the Foundation's friends are worthy of special mention. These individuals include:

Honors of the Foundation Award Recipients
Distinguished Service Award Recipients
Graduate Student Speech-Language Pathology Scholarship Recipients
RiteCare Society Members
Foundation Fellows

Special Award Recipients

The Scottish Rite Foundation of Colorado presents two major awards in recognition of individuals and/or organizations that have helped to make a difference.

The highest award is the "Honors of the Foundation." Its purpose is to recognize individuals whose contributions have significantly enhanced the work of the Foundation. The award is presented to either Masons or non-Masons whose personal philanthropy, dedicated leadership, and/or sustaining support have enabled the Foundation to achieve its mission and vision. A suitable trophy is presented to the recipient.

The second highest award is the "Distinguished Service Award." Its purpose is to recognize individuals or groups who contribute time or talents to improving services in RiteCare programs. The award is presented to either Masons or non-Masons whose contributions in time and/or talents have significantly improved the operations of the Foundation or care of children in the RiteCare programs.

	Honors of the Foundation
2004	John I. Ladd, 33°
2005	Dwight A. Hamilton, 33°
2006	William D. Hewit, 33°
2007	Bruce A. Kelley The Rollie R. Kelley Family Foundation
	Kathryn Kelley Huwaldt The Rollie R. Kelley Family Foundation
	Barbara J. Kelley The Rollie R. Kelley Family Foundation
2008	George, 32° KCCH, & Neva Frohlick
	Deborah Hayes, Ph.D. Kelley Family/Schlessman Family Scottish Rite Masons Chair in Childhood Language Disorders, Children's Hospital Colorado
2009	Ben M. Crossno, 33°
2010	Lee E. Schlessman, 33°, Grand Cross

Distinguished Service Award

2004	Denver Consistory Ladies
2005	John S. Russell, 33°
2006	Ashley S. Buss, 32° KCCH
2007	Sandra D. Morrison Vice President, Children's Hospital Colorado Foundation
	Valerie Hernandez Special Assistant to Deborah Hayes, Ph.D. Children's Hospital Colorado
2008	Norman L., 33°, & Juanita Hoff
	James L. Nunn, 33°
2009	Virginia Howey
2010	Director, The Piñon Project Otsie Stowell, 32° KCCH

Graduate Student Speech-Language Pathology Scholarship Recipients

The graduate scholarship program assists second-year graduate students in speech-language pathology complete their education. It also encourages (but cannot require) them to seek employment in Colorado. Through 2010, 32 scholarships totaling \$165,000 have been awarded. As noted below, the Colorado Masons participated in this program, generously assisting the Foundation.

In 2005 the Scottish Rite Foundation of Colorado initiated a graduate scholarship in speech-language pathology. This scholarship is named in honor of former Sovereign Grand Inspector General and President of the Foundation, Dwight A. Hamilton. Between 2005 and 2010 the Foundation awarded twelve scholarships totaling \$60,000.

In 2003 the Colorado Masons' Benevolent Fund Association, in collaboration with the Foundation, initiated a graduate scholarship in speech-language pathology. The Association is the main charitable arm for the Most Worshipful Grand Lodge of Ancient Free and Accepted Masons of Colorado. Between 2003 and 2010 the Association awarded sixteen scholarships totaling \$80,000.

In addition, a national scholarship in speech-language pathology was awarded to four Colorado graduate students by the *Supreme Council* of the Ancient and Accepted Scottish Rite of Freemasonry for the Southern Jurisdiction. This scholarship is known as the Sam and Millie Hilburn Scholarship in the field of Childhood Language Disorders. A total of \$25,000 has been awarded.

Sam and Millie Hilburn Scholarship (Supreme Council) in the field of Childhood Language Disorders

2001	Vindi Wells	University of Northern Colorado
2005	Marybeth Ames	Ph.D. Candidate & Speech Pathologist at Children's
		Speech & Reading Center in Fort Collins
2010	Rebecca L. McNeil	University of Colorado
2010	Christina D. Wilkins	University of Colorado

Dwight A. Hamilton Scottish Rite Foundation Graduate Scholarship in Speech-Language Pathology

2005	Joni M. Oldroyd	University of Colorado
2005	Rachael E. Glustrom	University of Colorado
2006	Amy M. Mulligan	University of Colorado
2006	Laura M. Wilson	University of Colorado
2007	Danielle K. Cavallaro	University of Colorado
2007	Amanda Vargo	University of Colorado
2008	Laura K. Jordan	University of Northern Colorado
2008	Jennifer M. Leggette	University of Colorado
2009	Kimberly A. Turner	University of Colorado
2009	Meghan K. Fitzgerald	University of Colorado
2010	Rebecca L. McNeil	University of Colorado
2010	Hannah L. Shippey	University of Colorado

Colorado Masons' Benevolent Fund Association Graduate Scholarship in Speech-Language Pathology

2003	Kyle R. Weber	University of Northern Colorado
2003	Mandy J. Hansen	University of Northern Colorado
2004	Brianne Lay	University of Northern Colorado
2004	Marie R. Pechous	University of Northern Colorado
2005	Jill Emeson	University of Northern Colorado
2005	Sara E. Rode	University of Northern Colorado
2006	Kristine D. Leedy	University of Northern Colorado
2006	Rachel K. Moore	University of Northern Colorado
2007	Lindsey Greer	University of Northern Colorado
2007	Adrianna Ackerman	University of Northern Colorado
2008	Jennifer Wiedmeier	University of Northern Colorado
2008	Sara N. Robinson	University of Northern Colorado
2009	Kristin M. Michie	University of Northern Colorado
2009	Alyssa J. Winbourne	University of Northern Colorado
2010	Natasha Maria	University of Northern Colorado
2010	Elisabeth A. Robertson	University of Northern Colorado



Audiology, Speech Pathology and Learning Service Management Team at Children's Hospital Colorado

RiteCare Society Members

The RiteCare Society was established by the Scottish Rite Foundation of Colorado in 2007 as an <u>association</u> of former and current volunteers who support the work of the Foundation. Society membership is earned by volunteering the equivalent of 30 hours in service to the Foundation. Current Society members are listed below according to Scottish Rite's organizational structure in Colorado.

RiteCare Society Members

Valley of Denver

Fran Adams Kay Applegate

Robert W. Applegate, 33°

Virginia Arner

Wayne G. Arner, 33° Esther M. Bartholic Robert L. Bartholic, 33°

Carol Bowser

Rosie Anderson Brandel Milton Brandwein, 33°

Ashley S. Buss, 32° KCCH

Phyllis Campbell

Marie Cox

G. Robert Dinkel, 32° KCCH

Lula Ellsworth

Donald L. Emarine, 33°

Glenita Emarine

Gerald A. Ford, 33°

Richard G. Frohlick, 33°

Donna Glasscock

James W. Glasscock, 33°

Robert W. Gregory, 33°

Tiz Hamilton Ruth Harlan

Deborah Hayes, Ph.D.

Judi Hessel

Michael E. Hessel, 33°

William D. Hewit, 33°

Valerie Hernandez

Juanita Hoff

Norman L. Hoff, 33°

Vernon B. Ingraham, 33°, Grand Cross

Charles G. Johnson, 33°

Judi Lehman

Thomas R. Magnuson, 33°

June McMullen

Stephen M. Munsinger, 33°, SGIG

Eileen Naiman Alice Norris Robert F. "Trey" Perrin, 32° KCCH

Claudene Preston

John S. Russell, 33°

Lee E. Schlessman, 33°, Grand Cross

Richard W. Schmidt, 33°

Donald F. Schultz, 33°

Jack M. Shepard, 32° KCCH

David D. Swift, 33°

JoAnn VanTrump

Valley of Colorado Springs/Pueblo

David K. Ashley, 32°

Robert M. Burr, 33°

William W. Chinn, 33°

David L. Coberly, 33°

Gordon R. Cooper, 33°

Ben M. Crossno, 33°

Kennard D. Henry, 33°

Kate Leyda

J. R. "Jack" McConnell, 33°

Michael L. McMillan, 33°

Donald A. Noffsinger, 32°

James L. Nunn, 33°

Donald C. Phillips, 33°

James A. Stivers, 33°

Gerome Walton, 32°

Elizabeth Woodman

Jack A. Woodman, 33°

Valley of Grand Junction

Richard S. Carnett, 32° KCCH

Thomas J. Cox, 32° KCCH

John W. Groves, 33°

Donald A. Hobbs, 33°

Rodney W. Johnson, 33°

James L. Smith, 33°

Otsie C. Stowell, 32° KCCH

Rex Swanson, 32°

Foundation Fellows

A Foundation Fellow is a distinguished designation for an individual who makes a monetary contribution to the Scottish Rite Foundation of Colorado of \$10,000 or more. It is open to all donors regardless of Masonic membership or affiliation.

Foundation Fellows

Robert L. Bartholic, 33° Esther M. Bartholic Richard S. Carnett, 32° KCCH James E. Duncan, 33° Susan M. Duncan George A. Frohlick, 32° KCCH Neva C. Frohlick Robert W. Gregory, 33° Deborah Hayes, Ph.D. James L. Martin, III, Ph.D. John R. Hendrickson, 33° William D. Hewit, 33° **Betty Ruth Hewit** Vernon B. Ingraham, 33°, Grand Cross Bruce A. Kelley Barbara J. Kelley Kathryn Kelley Huwaldt Thomas L. Redditt, Sr., 33° Elinor P. Redditt Leon C. Rittenhouse, 32° Lee E. Schlessman, 33°, Grand Cross Dolores J. Schlessman Irving O. Shuel, 32° KCCH Betty L. Shuel Roger A. Wainwright, 32° Ernest O. West, 32°



Dolores and Lee Schlessman with Deborah Hayes (center)

Exhibits

The following Exhibits provide additional information on Foundation activities in 2010.

- Exhibit A Audited Statement of Financial Position
- **Exhibit B** Audited Statement of Activities
- **Exhibit C** Comparison of Recent Three-Year Financial Trends
- Exhibit D Recap of RiteCare Children Served in Colorado
- Exhibit E Outcomes Evaluation of Children's Developmental Progress during Therapy
- Exhibit F Selected Highlights from Individual Partner Programs 2010 Annual Reports
- Exhibit G Scottish Rite Foundation and RiteCare Partner Addresses & Phone Numbers

EXHIBIT A

Audited Statement of Financial Position

Scottish Rite Foundation of Colorado December 31, 2010

Assets

Cash and cash equivalents:			
Unrestricted	\$ 1,287,911		
Temporarily restricted	 43,406	\$	1,331,317
Interest receivable			61,485
Pledges receivable			104,124
Accounts receivable			150,416
Investments			18,751,199
Fixed assets, net			5,497
Beneficial interest in split-interest agreements			821,064
Total Assets		<u>\$</u>	21,225,102
Liabilities and net assets			
Accounts payable and accrued liabilities	\$ 346		
Grants payable	347,654		
Grana payaoro		-	
Total liabilities		\$	348,000
Net assets:			
Unrestricted	\$ 19,769,061		
Temporarily restricted	1,108,041		
Tomporumy rosumous		•	
Total net assets			20,877,102
Total liabilities and net assets		\$	21,225,102

Note: The Scottish Rite Foundation of Colorado requires its annual financial statements to be audited by an independent certified public accountant. An annual IRS form 990 is also prepared. The auditing firm in 2010 was Marrs, Sevier & Company, LLC. The auditors expressed a clean opinion on the 2010 financial statements in their letter to the Board of Trustees dated June 31, 2011. The auditors' report, including the audited financial statements, and the IRS form 990 are permanently on file in the Foundation office. These documents are available for public review upon request.

EXHIBIT B

Audited Statement of Activities

Scottish Rite Foundation of Colorado Year ended December 31, 2010

	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Support and revenue: Investment income:				_
Interest and dividends	\$ 574,020			\$
	, ,,,,,,			574,020
Other investment income	7,624			7,624
Realized losses	(267,443)			(267,443)
Unrealized gains	955,977			955,977
Donations and memberships	169,809			195,294
Change in split interest	,	63,263		63,263
agreements		,		,
Donations released from				
restrictions	40,345	(40,345)		
Total support and revenue	1,480,333	48,403	-0-	1,528,736
Expenses:				
Program grants - Annual	1,268,669			1,268,669
Management and general	73,062			73,062
Fundraising	15,378			15,378
Total expenses	1,357,110	-0-	-0-	1,357,110
Change in net assets	123,223	48,403		171,626
Net assets at beginning of year				
As previously reported	19,145,838	1,059,638	\$ 500,000	20,705,476
Reclassification of Net				
Assets at beginning of year	500,000		(500,000)	
Restated Net Assets at beginning	40 - 42	4.070		20 507 1 55
of year	19,645,838	1,059,638		20,705,476
Not assets at and of our	¢ 10.760.061	¢ 1 100 041	¢.	¢ 20.077.102
Net assets at end of year	<u>\$ 19,769,061</u>	\$ 1,108,041	<u>\$</u>	\$ 20,877,102

Note: The Scottish Rite Foundation of Colorado requires its annual financial statements to be audited by an independent certified public accountant. An annual IRS form 990 is also prepared. The auditing firm in 2010 was Marrs, Sevier & Company, LLC. The auditors expressed a clean opinion on the 2010 financial statements in their letter to the Board of Trustees dated June 30, 2011. The auditors' report, including the audited financial statements, and the IRS form 990 are permanently on file in the Foundation office. These documents are available for public review upon request.

EXHIBIT C

Comparison of Recent Three-Year Financial Trends (including administrative overhead rates)

By considering the audited Statement of Activities for 2008-2010, the average administrative overhead rate for the preceding three years was 4.6%. The 2010 administrative overhead rate was 5.4%. This overhead rate is calculated by dividing the total general and administrative overhead expense by the total expense which includes grants and fundraising costs.

Scottish Rite Foundation Financial Recap
(based on audited financial statements)
2010

Grants to Partners	\$1.4 million
Donations Received	\$195,000
Children Served	1,008
Overhead Rate	5.4%

Scottish Rite Foundation Financial Recap (based on audited financial statements) 2008-2010

Grants to Partners \$4.9 million
Donations Received \$1.5 million
Children Served 3,625
Overhead Rate 4.6%



RiteCare Children - Montrose Memorial Hospital

EXHIBIT D

Recap of RiteCare Children Served in Colorado				
Partner	Geographic Area of Colorado	First Year of Active Partnership	Children Served Since Partnership Inception	Children Served in 2010
		Denver Metro, N	orth, and Northeas	
Children's Hospital Colorado – Aurora	Denver Metro Area	1953	10,258	341
Children's Speech & Reading Center – Fort Collins	North	1998	704	136
University of Northern Colorado – Greeley	North	2001	109	13
Sterling Regional MedCenter – Sterling	Northeast	2006	17	1
University of Colorado – Boulder	North	2007	170	41
Total Children Served in	Service Area	l	11,258	532
Clinic Pro	grams – Service	Area: South an	d Southeast Colora	do
Children's Hospital Colorado Therapy Center – Pueblo (clinic operation assumed by Children's Hospital Colorado in 2001)	South	1987	799	55
Memorial Hospital – Colorado Springs	South	1997	447	38
Arkansas Valley Regional Medical Center – La Junta	Southeast	2006	17	2
Let's Talk! Speech Therapy – Cañon City	South	2006 (discontinued in 2007)	1	0
Total Children Served in	Service Area	,	1,264	95
Clinic Pro	grams – Service	Area: West and	d Southwest Colora	do
St. Mary's Life Center – Grand Junction	West	1986	1,169	78
Montrose Memorial Hospital	West	1998	385	51
Total Children Served in	Service Area		1,554	129
TOTAL CLINIC PROG	RAM CHILDR	EN SERVED	14,076	756
Early Language Devel	opment Prograi		ea: West and South	west Colorado
The Piñon Project – Cortez	Southwest	2000	1,166	188
Western Slope Head Start – Grand Junction	West	2005	327	64
Total Early Language Development Program Served TOTAL RITECARE CHILDREN SERVED			1,493 15,569	252 1.008

EXHIBIT E

Outcomes Evaluation of Children's Developmental Progress during Therapy

The Outcomes Evaluation was implemented statewide in 2002 to measure a RiteCare child's development in a variety of areas including social skills, expressive language and language comprehension. It was initiated by Dr. Deborah Hayes and Martha Drake, Manager, Children's Hospital Colorado Therapy Center – Pueblo, a satellite clinic of Children's Hospital Colorado. As of December 31, 2010, the inventory database includes 966 children.

The evaluation is based on parental assessment of a child's development by standardized questionnaire, *Child Development Inventory*. Parents know their child best. A parent's perspective and priorities are invaluable to planning therapy. Thus, this input is critical to assessing a child's progress during therapy.

Measures include comparing children's developmental age in each domain (e.g., social skills, etc.) with their chronological age. If the child's developmental age is equivalent to his/her chronological age, his/her developmental quotient is 100. Typically developing children have developmental quotients in all domains ranging from 85 to 115.

On the average, children enrolled in the Foundation's clinical program show developmental delay, most pronounced in expressive language and language comprehension. The most robust developmental gains for children enrolled in the Foundation's clinical programs are in the area of "social skills." Most "social skills" items in the inventory relate to social-communicative behaviors (e.g., asks for help. . . understands "wait a minute" . . . talks about how to do . . . makes excuses . . .).

Children who enter Foundation clinical programs with the most significant delays in language comprehension make slow, steady progress in social skills, expressive language, and language comprehension.

Children who enter Foundation clinical programs with less significant delays in language comprehension show progress within six months of therapy, then progress declines. Children who make rapid progress are discharged before one year; children "top out" on the scale.

The following chart presents the evaluation results for the children in the inventory who are diagnosed with Apraxia of speech. This is a "motor-speech" disorder that affects a child's ability to coordinate the muscles of speech (e.g., tongue, lips) resulting in inability to sequence speech sounds correctly for clear understanding. As the chart indicates, children with Apraxia show improvement in all communication domains.



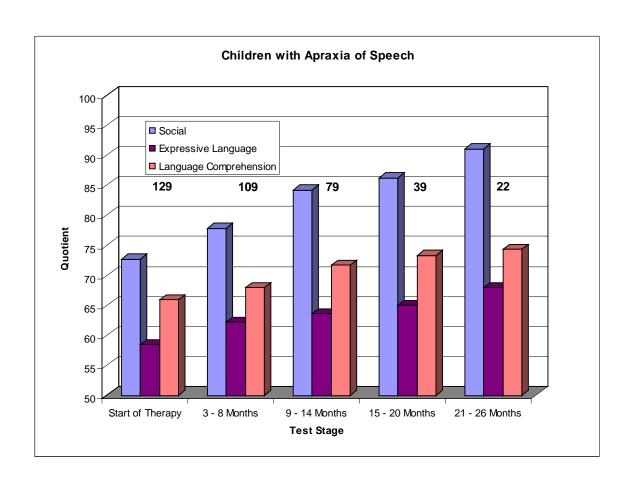


EXHIBIT F

Selected Highlights from Individual Partner Programs 2010 Annual Reports

<u>Children's Hospital Colorado</u> Aurora & Denver Area Network of Care



Children's Hospital Colorado at Anschutz Medical Campus, Aurora, Colorado (Source: Children's Hospital Colorado)

- 1. Three hundred forty-one (341) children received speech therapy and treatment at Children's Hospital Colorado and its Denver Metro Area clinics with Scottish Rite Foundation financial assistance. These children ranged in age from less than one year through school age, with the majority of children in the age range of three through six years.
- 2. Eighty-one (81) children received multidisciplinary cleft palate clinic evaluations.
- 3. Twenty-four (24) children and siblings attended the *Talking with Technology* Camp a week-long mountain camp program for children and young people who use computerized communication devices. In addition to the Scottish Rite Foundation of Colorado, the *Rollie R. Kelley Family Foundation* provided generous financial support for this camp. The 2010 camp was the 24th consecutive year for the camp which is held annually near Empire, Colorado.
- 4. Four children, five siblings, and ten parents participated in a family-centered, parent-education group to enhance communication skill development in their young child. This special program, *First Steps*, is a weekend learning experience for families considering assistive communication technology for their young child. The *Rollie R. Kelley Family Foundation* provided generous financial support for this program.



The Rollie Kelley Children – Kathryn, Barbara, and Bruce The Rollie R. Kelley Family Foundation members



Boy and Trainer 2010 Talking with Technology

<u>Children's Hospital Colorado Therapy Center – Pueblo</u> (a Network of Care clinic of Children's Hospital Colorado)

- 1. Fifty-five (55) children received speech therapy and treatment with financial assistance from the Scottish Rite Foundation. Children from the local Pueblo area as well as children living as far away as Creede and Monte Vista received services at the Pueblo clinic.
- 2. The clinic has an augmentative-alternative communication specialist and consultant who works with children requiring an electronic communication device. The specialist is also working on obtaining communication devices for three of the children.
- 3. Clinic staff provided consultation and parent education services to the *Soaring Eagles Center for Autism*. The RiteCare clinic director, Martha Drake, serves on the Center's Board of Directors.

St. Mary's Life Center – Grand Junction



St. Mary's Life Center

- 1. Seventy-eight (78) children received speech-language services with financial assistance from the Scottish Rite Foundation. Children served throughout the year were between the ages of 1 to 7 years. Children up to 12 years of age were served in the summer programs. Children were from the following communities: Grand Junction, New Castle, and Mesa.
- 2. Autism programs were conducted for children with the autism spectrum disorder diagnosis who have varying levels of skills requiring a multitude of different treatment approaches.
- 3. The clinic expanded its theme based programs in 2010. The weekly themes are constructed around a book. Each book is chosen for the concepts, vocabulary, and/or the speech sounds it contains. The themes are expanded or modified so children are provided repetition and practice of the materials throughout all their therapy sessions each week.
- 4. The clinic's reading readiness program and summer literacy programs are based on a multisensory approach. Parents are requested to directly participate in the therapy session to prepare them to use the techniques while helping with their children with their daily homework assignments.

Memorial Hospital for Children - Colorado Springs



Memorial Hospital Rehabilitation Clinic at Printer's Park

- 1. Thirty-eight (38) children received speech-language services with financial assistance from the Scottish Rite Foundation.
- 2. Services are provided at three locations in Colorado Springs: the main facility at Printer's Park Medical Plaza, the Powers clinic in east Colorado Springs, and the Briargate clinic near the North Hospital campus.
- 3. Two free speech and hearing screenings were offered to the community in 2010.
- 4. The clinic continues to be dedicated to the following specialized services: Autism Clinic, Cleft Palate Clinic, Feeding Clinic, Infant Development Clinic, and Rehabilitation Clinic to serve children with specific or medically related concerns.

<u>Montrose Memorial Hospital – Montrose</u>



Clinic Staff with Masons and Dr. Hayes attending Rehab Clinic open house

- 1. Fifty-one (51) children were served with financial assistance from the Scottish Rite Foundation. Therapy services were provided in a five county area with clinics in Montrose and Delta.
- 2. Special summer programs were offered for students whose primary language is Spanish, therapy programs for school aged children, and ongoing therapy for toddlers and preschoolers. The Delta site summer program consisted of two, 3-week blocks of intensive speech and language therapy.

University of Northern Colorado – Greeley



Gunter Hall, UNC Campus - Home to the RiteCare Clinic

- 1. Thirteen (13) children were served with financial assistance from the Scottish Rite Foundation of Colorado.
- UNC's Speech-Language Pathology and Audiology Clinic provides training for graduate students by giving services under supervision during their entire academic program.
- 3. The *Talking and Listening for Preschoolers* program, on-going since the summer 2007 with support from the *Daniels Fund* and Scottish Rite Foundation which collaborated in helping develop this program, provided therapy for children in a literature-based interactive group setting meeting two times per week for two hour sessions, resulting in 52 hours of direct intervention per semester. The curriculum focuses on the development of vocabulary and concepts, oral and written sound and word awareness, comprehension and expression of narratives and stories, and speech production (articulation and phonology) skills.
- 4. The *Speaking and Signing Stories* program, which also began in the summer of 2007 as a result of the *Daniels Fund*/Scottish Rite Foundation collaboration, provided therapy for children who are deaf or hard-of-hearing. It is a literature-based program that targets all components of language through the use of both speech and American Sign Language.

University of Colorado – Boulder



Speech-Language Hearing Center - CU-Boulder Campus

- 1. Forty-one (41) children were served with financial assistance from the Scottish Rite Foundation.
- 2. CU's Speech Language and Hearing Center on the Boulder campus provides training for graduate students by giving services under supervision of certified clinical faculty during their entire academic program.
- 3. The Center's focus is to identify and serve young children and their families in Boulder County and surrounding areas who may not otherwise receive speech and language therapy due to a lack of funding for therapeutic services.
- 4. The *Story of Friendship* program focuses on specific communication and language learning needs of children with autism spectrum disorder (ASD) in the natural context of their school environment and incorporates peers as friends. It is a community-based program housed at Creekside Elementary School in the Boulder Valley School District.
- 5. The Space Camp and Space Exploration programs offer special services for children identified with Asperger's Syndrome and their friends focusing on the specific language, communication, and language learning needs of children identified with ASD.

Children's Speech and Reading Center – Fort Collins



Two Children at the CSRC Clinic

- 1. One hundred thirty-six (136) children were served with financial assistance from the Scottish Rite Foundation.
- 2. Free speech-language and reading screens were offered on an on-going basis with families coming from the following communities: Fort Collins, Loveland, Greeley, Estes Park, Johnstown, Berthoud, Windsor, and Wellington.
- 3. The Center provided a variety of individual and small group programs for early childhood communication and reading readiness. This included weekly language and literacy groups at Thompson Valley Preschool and United Day Care.
- 4. In 2010 a social skills group, "High 5 Club," was added for children five to seven years old, diagnosed with autism or Asperger's Syndrome.
- 5. In 2010 clinic services were expanded to include augmentative and alternative communication (AAC) evaluations and therapy. These devices can give a non-verbal child a way to communicate and can supplement existing speech or replace speech that is not functional.

<u>Sterling Regional MedCenter – Sterling</u>

- 1. One child was served with financial assistance from the Scottish Rite Foundation.
- 2. Sterling Regional MedCenter is a 41-bed hospital and employs a speech/language pathologist who is responsible for providing speech/language services for acute care hospital patients, outpatient adult, pediatric rehabilitation, pediatric pre-school, and home-based Part-C funded speech therapy. The speech therapist's caseload sees significant diversity and fluctuations in type, severity and number of patient services. The local community has many families in a low socioeconomic status with many children receiving Medicaid support for health services and many other children receiving services funded by other state and federal resources. There has been a notable decline in children being serviced by the Scottish Rite Foundation as more children are receiving speech therapy services within their local school and community programs. Nonetheless, the Scottish Rite Foundation of Colorado remains committed to making its services available for this clinic partner.

Arkansas Valley Regional Medical Center - La Junta

- 1. Two children were served with financial assistance from the Scottish Rite Foundation of Colorado.
- 2. This center is the only hospital or clinic in the southeastern Colorado area (on the Highway 50 corridor east of Pueblo) that provides speech-language pathology services for children, except in the school setting. The Scottish Rite Foundation of Colorado remains committed to making its services available for this clinic partner.

The Piñon Project – Cortez

- 1. One hundred eighty-eight (188) children were served with financial assistance provided by the Scottish Rite Foundation.
- 2. The program funded by the Scottish Rite is known as the Treasure Chest Program, a preschool-age early language development program.
- 3. The Treasure Chest Program was conducted at the following locations: Cortez, Dolores, Dove Creek, Mancos, and Towaoc.
- 4. This program serves needy and low income children in this part of the State and is in great demand by families of preschoolers.
- 5. The Project made monthly presentations and distribution of materials at the Cortez Public Library, serving a broad range of families including foster families, bi-lingual families, and grandparents raising grandchildren.

Western Slope Head Start (Rocky Mountain SER) – Grand Junction

- 1. Sixty-four (64) children were served in the Treasure Chest Program with funding provided by the Scottish Rite Foundation of Colorado.
- 2. At the end of 2010 there were 54 families on the waiting list for the Treasure Chest Program.



Two Brothers Supporting Each Other

Exhibit G

Scottish Rite Foundation and RiteCare Partner		
	Phone Numbers	
Scottish Rite Foundation of Colorado	Children's Hospital Colorado	
1370 Grant Street	Department of Audiology, Speech	
Denver, CO 80203	Pathology, and Learning Services	
303-861-2410 (toll free: 866-289-6797)	13123 E. 16 th Ave., B-030	
www.scottishritefoundation.org	Aurora, CO 80045	
ritecare@scottishritefoundation.org	720-777-6800	
Arkansas Valley Regional Medical	Children's Speech and Reading Center	
Center	1247 Riverside Avenue, Suite 4	
Rehabilitation Services	Fort Collins, CO 80524	
1100 Carson Avenue	970-419-0486	
La Junta, CO 81050		
719-383-6456		
Children's Hospital Colorado Therapy	Memorial Hospital for Children	
Center – Pueblo	Pediatric Rehabilitation Services	
704 Fortino Blvd, Suite A	175 S. Union Blvd.	
Pueblo, CO 81008	Colorado Springs, CO 80910	
719-595-0829	719-365-5422	
Montrose Memorial Hospital	St. Mary's Life Center	
Mountain View Therapy	Language Development Clinic	
800 South Third Street	1100 Patterson Road	
Montrose, CO 81401	Grand Junction, CO 81506	
970-240-7369	970-298-6158	
Sterling Regional MedCenter	University of Northern Colorado	
Rehabilitation Services	Audiology and Speech Language Sciences	
615 Fairhurst Street	Gunter Hall, Campus Box 140	
Sterling, CO 80751	Greeley, CO 80639	
970-526-4818	970-351-1587	
The Piñon Project	Western Slope Head Start	
300 N. Elm St.	Rocky Mountain SER	
P.O. Box 1510	835 N. 26 th Street	
Cortez, CO 81321	Grand Junction, CO 81502	
970-564-1195	970-243-9318	
University of Colorado – Boulder	*	
Speech, Language and Hearing Sciences	a la se	
2501 Kittredge Loop Road	Safeth Linguage	
Campus Box 409	N N N	
Boulder, CO 80309	RiteCare AND	
303-492-5375	Contrib Dita Manager	
	Scottish Rite Masons	
	Helping Children Communicate	
	Scottish Rite Foundation of Colorado	