

CELEBRATING A DECADE OF MAKING LIFE BETTER

**10** *D*

*...one individual at a time.*

2000 - 2010

DANIELS FUND

2009 REPORT TO THE COMMUNITY

# Report to the Community



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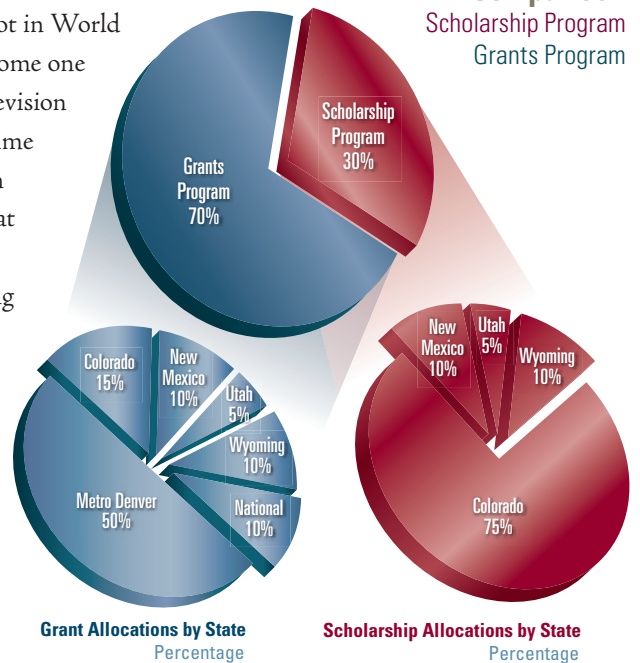
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## DANIELS FUND OVERVIEW

**Bill Daniels** was a patriotic American who achieved success through a combination of hard work, determination, and a willingness to take risks. He was a decorated fighter pilot in World War II, and he went on to become one of the pioneers in the cable television industry. Throughout his lifetime he gave generously to people in need and the organizations that serve them. Bill Daniels spent his final years carefully defining his goals for the Daniels Fund which carries on his legacy of generosity by providing college scholarships to deserving students and grants to nonprofit organizations in Colorado, New Mexico, Utah, and Wyoming.

### Comparison Scholarship Program Grants Program



## Daniels Fund Grants Program

**Honoring** the percentages for giving established by Bill Daniels, each year approximately 70% of charitable allocations are made through the **Daniels Fund Grants Program** in the funding areas (listed at right) he defined for the foundation.

- Aging
- Alcoholism & Substance Abuse
- Amateur Sports
- Disabilities
- Education
- Homeless & Disadvantaged
- Youth Development

## Daniels Fund Scholarship Program

**Bill Daniels** directed that approximately 30% of charitable allocations be made through the Daniels Fund Scholarship Program, which consists of the Daniels Scholarship and the Daniels Opportunity Scholarship. Daniels Scholarships give promising students with financial need the opportunity to obtain a bachelor’s degree. Daniels Opportunity Scholarships support non-traditional students including *adults entering or returning to college; students from alternative schools, juvenile justice facilities and youth offender programs; GED recipients; former foster care youth, returning military, and emergency service providers.*

# 10 Years of Making Life Better



◀ Bill Daniels passes away

The Daniels Charitable Fund becomes the Daniels Fund and the Board of Directors is constituted – Phil Hogue is named founding President/CEO

First Scholars Heading Into the Future (SHIFT) program is held

Funding begins for grants in New Mexico and Wyoming

Second class of 59 Daniels Scholars named in Colorado ▶



New Mexico Military Institute receives \$20 million grant for capital construction, including the Daniels Leadership Center



## 2000

Funding begins for grants in Colorado



◀ Inaugural class of 32 Daniels Scholars named in Colorado

## 2001

New York Community Trust receives \$500,000 grant for the September 11th Fund

## 2002

Children's Hospital receives \$2 million, 10-year grant to establish the Bill Daniels Center for Children's Hearing ▶



Red Cross in Hobbs, New Mexico receives \$10,000 Bill Daniels Neighborhood Hero Award

Daniels Fund launches "7 Strategies for Success" program to promote school-business partnerships

Dan Ritchie is elected Chairman of the Board

Daniels Scholarship program selects its 1,000th scholarship recipient

Utah selects its first group of Daniels Scholars

Linda Childears becomes President/CEO

Phil Hogue, founding President/CEO passes away ▶



Charter Schools Development Corporation receives \$3 million grant



## 2005

Daniels Fund surpasses \$100 million in grants awarded since inception

The Sea-Air Operations Gallery at the Smithsonian Institute in Washington is named in memory of Bill Daniels ▶



Daniels Fund KOOL105 Cause of the Month launches to promote nonprofit awareness

An emergency grant of \$500,000 is made for Hurricane Katrina victims

## 2006

The Davis Hospice Center in Wyoming receives \$500,000 grant to construct the new Center

The Daniels College of Business receives \$3 million grant in support of its award-winning business ethics program

Central Wyoming Counseling Center receives \$1 million grant to build meth treatment facility

## 2007



◀ Daniels Fund successfully clarifies that Amendment 41, which regulates gifts to state employees and their families, does not apply to Daniels Scholarship recipients



◀ Betty Ford Center Children's Program receives \$1.5 million challenge grant to expand into Colorado



Hank Brown becomes President/CEO

◀ Daniels Opportunity Scholarship (DOS) program launches

John Saeman is elected Chairman of the Board

Grants funding expands into Utah ▶



Daniels Fund begins offering meeting space free of charge to nonprofit organizations

First Daniels Scholars start graduating ▶



Grantmaking expands to serve all seven program areas in all four states

J A S O N D J F M A M J J A S O N D J F M A M J J A S O N D

**2003**

Wyoming and New Mexico send their first classes of Daniels Scholars to college

Jack Daniels, founding Chairman of the Board passes away

**2004**

New Daniels Fund building in Denver is dedicated

Daniels Fund partners with the Denver DA's office and 9NEWS to launch Parents are the Power anti-drug abuse campaign



◀ Denver's Police Activities League receives \$5 million grant to construct new headquarters/facilities (see story page 19)

Daniels Scholar Success Program launches

Congressional Medal of Honor Society posthumously presents Bill Daniels with Distinguished Citizenship Award for lifetime of heroic services



Hank Brown is elected Chairman of the Board

◀ Marlon Peoples becomes the first Daniels Scholar to earn a doctorate degree

Daniels Scholars career mentoring program launches

Daniels Scholarship program launches Referral Agency process

Daniels Fund surpasses \$200 million in grants awarded since inception

J A S O N D J F M A M J J A S O N D J F M A M J J A S O N D

**2008**



◀ Feeding America receives \$1.7 million grant to benefit emergency food providers

◀ Funding is provided to launch the Meth Project in Colorado and Wyoming



ColoradoMethProject.org

Daniels Fund named Top Foundation at National Philanthropy Days

Roadrunner Food Bank of New Mexico receives \$1.1 million grant to expand capacity

The University of Wyoming College of Business receives support totaling \$3.1 million to expand "principle-based ethics" programs across the state ▶

**2009**

Denver Hospice receives \$1.5 million grant to build a new wing for veterans ▶



Dominick Moreno becomes the first Daniels Scholar to be elected to public office ▶



\$7.5 million grant approved to launch Daniels Fund Ethics Initiative ▶ (see story on page 19)



## Message from the Chairman and President/CEO

**This year's report** to the community is a special one for the Daniels Fund. It marks 10 years in operation for our organization, as well as 10 years since our dear friend and founder, Bill Daniels, passed away. Each day we are reminded of his incredible generosity, his sincere interest in helping people achieve their potential, and his unfailing commitment to the highest standard of values and ethics. Weaving characteristics like these into the fabric of the Daniels Fund has been one of the many important steps along the road to building our foundation into what it is today.

When Bill outlined his vision for the Daniels Fund, he was very specific about the charitable purposes and geographic areas he wanted to support. For the past 10 years we've worked hard as a Board of Directors and staff to build and refine the Daniels Fund into an organization of which Bill Daniels would be proud – not only one that makes the impact he wanted in communities he cared about, but that also reflects his personal values and approach to helping others.

To this day, the Daniels Fund Board of Directors is still 100% composed of people who personally knew Bill; all who care deeply about guiding the foundation in the direction he would have wanted. We've deliberately taken advantage of their collective knowledge to study and document Bill's lifetime of helping others, his values and principles, and what motivated his directives for the organization. We then turned that understanding into policies, strategies, and practices that guide everything we do in a way that honors Bill's wishes and his legacy – now and into the future.

As we look back on the last 10 years, we cannot help but think that even Bill would be amazed by all that is being accomplished through the foundation he established. The people whose lives have been affected are what tell the real story. It's thrilling to consider the 1,755 young people who have been given the opportunity to get a college education through Daniels Scholarships. Bill would be incredibly proud to see how many Daniels Scholars have not only graduated, but are also giving back as volunteers and as involved citizens in their communities.

Likewise, we know it would please him immensely to hear the remarkable stories we hear every day about countless people whose lives have been changed by the thousands of organizations receiving Daniels Fund grants. Knowing Bill, he would have wanted to reach out and meet the individuals personally, encourage them to never give up, and to face their challenges head-on.

In celebration of the Daniels Fund's 10-year anniversary, this report highlights 10 years of giving through our grants and scholarship programs. As you will see, it takes you beyond the numbers and explores 10 stories of lives made better - from Adam, who recovered from a life of drug addiction; to Katrina, who overcame a learning disability to fulfill her dream of helping others. They represent the impact Bill Daniels wanted to make and we are honored to share their stories with you.

Bill loved helping people and changed many individual's lives during his lifetime. Guided by his principles, we look forward to carrying on his legacy of making life better, one individual at a time for many more decades to come.



# Achieving the Impact that Bill Daniels Wanted to Make

**Bill Daniels** had a very personal concern and active involvement with individuals facing challenges. The seven funding areas he defined for the Daniels Fund Grants Program were a direct outgrowth of the challenges he observed others experiencing, or that he experienced himself. They share the common theme of investing in individuals to give them access to tools or skills to be resilient and successful.

From our first year, the Board and staff have focused on building a Grants Program that honors Bill Daniels' direction and motivations, designing grant strategies that provide the impact Bill wanted as his legacy. Community engagement has been an important element of our success. By reaching out, listening, and learning about the unique character and needs of individual communities across our four states, we've built strong relationships with thousands of nonprofits whose impact is aligned with our goals.

Since the first 12 grants were awarded in 2000, we've grown to more than 700 grants each year, which reach into the farthest corners of our four-state region of Colorado, New Mexico, Wyoming, and Utah. In just ten years, total grant awards exceed \$270 million. More than 6,000 grants have supported grantees large and small, rural and urban, from start-ups to a century old.

We have great respect and admiration for the exceptional nonprofits serving our communities. They are the front line that allows us to achieve the real legacy Bill Daniels sought. Working together, we are improving the lives of people every day.

## Daniels Fund – 10 Years of Grantmaking

Total grants paid since inception:	<b>\$270.1 million</b>			
Total # of grants paid since inception:	<b>6,000</b>			
Total grants paid by state since inception:				
	<b>Colorado</b> \$168,616,120	<b>New Mexico</b> \$45,052,567	<b>Wyoming</b> \$21,912,100	<b>Utah</b> \$9,975,487
	<b>National</b> \$24,619,235			

## GRANTS PROGRAM FUNDING AREAS

**Aging** – Bill's interest in helping older adults cope with the difficulties of maintaining independence and quality of life stemmed from personal experiences as he aged and those of his mother.

**Alcoholism & Substance Abuse** – As someone who identified himself as a recovering alcoholic, Bill wanted to help persons struggling with alcohol or substance abuse to achieve stability.

**Amateur Sports** – Bill believed that the teamwork and discipline instilled through participation in sports had the power to change the direction of a young person's life for the better.

**Disabilities** – Observing his mother's care of his developmentally disabled sister, as well as his own struggle with hearing loss, led to Bill's goal to help individuals and families cope with the challenges of disabilities.

**Education** – Bill believed all young people deserve equal opportunities for an excellent education as a necessity for a successful future.

**Homeless & Disadvantaged** – First-hand experience growing up poor during the Great Depression made a profound impression on Bill, fueling an incredibly strong desire to help those in need.

**Youth Development** – Bill believed that character, values, and responsibility were critical to success in life, and supported youth programs that instill those traits.



Support is provided to education reform initiatives and programs that expand school choice and boost academic achievement.



*Hospice programs that help seniors maintain personal dignity and maintain maximum independence and quality of life receive support from the Daniels Fund.*



*Quality sports programs that teach discipline, confidence, teamwork, and sportsmanship receive support through the Amateur Sports funding area.*



*The tragedy of addiction to alcohol and/or drugs is a reality across our four-state region. Helping lift the burden of addiction is a focus of the Alcoholism and Substance Abuse funding area.*



*Food banks across our four states provide healthy, nutritious food to thousands of people. We are proud to join the countless volunteers and donors in helping food banks reach as many people as possible.*



*People with disabilities are often not able to afford the life-altering equipment they need. The Daniels Fund supports agencies that provide equipment to the disabled.*

## THE DANIELS SCHOLARSHIP PROGRAM

# Finding the Winning Formula for Success

**Bill Daniels** once said, "One of my favorite hobbies is helping students achieve their utmost potential through education." Before his death ten years ago, he dreamed of turning that hobby into something bigger and outlined the basic elements for the Daniels Scholarship program.

Over the years, the program has undergone significant evolution and growth as we've worked hard to find the winning formula for success.

The program is about more than just financial support. We've spent a great deal of time developing elements that have become the hallmarks of the program's success. These include the Daniels Scholar Success Program, the network of community agencies across our four states that nominate scholarship candidates, the many local volunteers who interview and select our Scholars, and many other elements.

Today, 10 years later, the program has awarded more than \$56 million in college scholarships to graduating high school seniors with financial need. It has grown from naming 32 Daniels Scholars in Colorado its first year, to more than 250 annually. Today's Scholars hail from urban and rural communities throughout Colorado, New Mexico, Wyoming, and Utah. 1,755 outstanding young people have been named Daniels Scholars since the program was established in 2000.

Additionally, the Daniels Fund has provided a total of \$10 million in scholarships to non-traditional college students since the Daniels Opportunity Scholarship program launched in 2003.

*Before heading off to schools across the country, new Daniels Scholars gather together on a college campus to meet one another, share questions about college, develop support systems, and learn about the Daniels Scholarship Program. Activities in the "Scholars Heading Into the Future Together" program include workshops that teach life skills, volunteer activities, and a closing banquet.*







The 253 members of the 2009 Class of Daniels Scholars gather at the University of Denver for the "Scholars Heading Into the Future Together" program.

## Measuring Impact

**452** Daniels Scholars have graduated from college (as of March 2, 2010)

**68%** of Daniels Scholars graduate from college – as compared to national statistics which show an overall college population graduation rate of 57% and 26% for low-income or first-generation students (graduation rates are based on students who have earned a Bachelor's degree within 6 academic years)

## Program Support

**665** high schools and youth-serving organizations serve as Referral Agencies

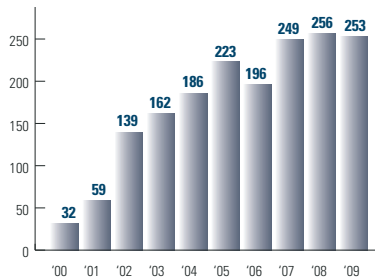
Approximately **300** community volunteers in **18** communities help select each class of Scholars

**25** universities where **70%** of Scholars attend school participate in the Daniels Scholar Success Program, a support system designed to help Daniels Scholars graduate from college and achieve success in life

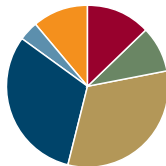
## Daniels Scholarships – 10 Years of Giving

Total Daniels Scholarships awarded since inception	<b>\$56,071,667</b>
Total Daniels Scholars named since inception (as of 2009)	<b>1,755</b>

## New Daniels Scholars by Year

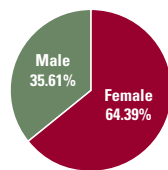


## Daniels Scholars by Ethnicity



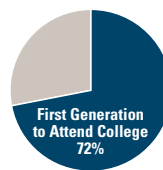
African American or Black:	<b>13%</b>
Asian, Asian American, Pacific Islander:	<b>9%</b>
Caucasian:	<b>32%</b>
Hispanic:	<b>31%</b>
Native/Aleut, or Native American:	<b>4%</b>
Other Race:	<b>11%</b>

## Male vs. Female



Following a national trend, more female students than male students apply for Daniels Scholarships.

## First Generation



Data is from 2009 only.

## Who are Daniels Scholars?

Graduating high school seniors with financial need. They are selected based on

- Strength of character
- Academic performance or promise
- Leadership potential
- Potential to contribute to one's community
- Well rounded personality.

Applicants come from virtually every county in the Fund's four states.

## The Daniels Scholarship Program Strives to...

- Provide financial support to students with financial need
- Help students obtain a Bachelor's degree
- Encourage students to give back to their communities
- Achieve higher than average college graduation rates
- Help students become successful, productive members of their communities

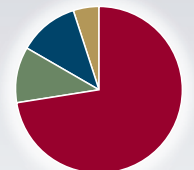
## DANIELS OPPORTUNITY SCHOLARSHIPS

Daniels Opportunity Scholarships support non-traditional students including adults entering or returning to college; students from alternative schools, juvenile justice facilities and youth offender programs; GED recipients; former foster care youth, returning military, and emergency service providers.

Total Daniels Opportunity Scholarships awarded since inception: **\$9,999,184**

Total Daniels Opportunity Scholars Named: **2,371**

Total Daniels Opportunity Scholarships awarded by state since inception:



Colorado	<b>\$7,249,568</b>
New Mexico	<b>\$1,103,402</b>
Utah	<b>\$1,165,464</b>
Wyoming	<b>\$480,750</b>

In celebration of the Daniels Fund's 10-year anniversary, we share with you 10 special stories about individuals whose lives have been made better. From Daniels Fund scholarship recipients to individuals who have received help and support from many incredible nonprofits throughout our four states, their stories are about second chances, new opportunities, and achieving dreams.

TEN YEARS

1

TEN STORIES

SCHOLARSHIPS

## Katrina *Achieving the dream of giving back as a teacher*

When people told Katrina Radosevich she couldn't go to college due to her learning disability, that just made her push herself even harder.

Katrina always knew she wanted to go to college. "My ultimate goal was becoming a teacher to give back to the community," she said. For her, those goals weren't a matter of "if", but rather a matter of "how." She wasn't about to let her reading and writing disability, nor her financial need, stand in her way.

She applied for and was awarded a Daniels Scholarship – an important first step. Because the Daniels Scholarship allows students to attend the school of their

choice, Katrina was also able to look for a school that could accommodate her unique learning needs. "My case is different. I needed a certain kind of school. I knew I

was going to need a lot of support," she said.

Katrina looked for a university that had smaller classes and a teacher-to-student ratio that would allow her to get extra help when she needed it. "Something that might take someone two hours to do, for me it might take four hours," she explained. She also looked for schools that specifically offered support for students with learning

disabilities. She found all that and more at Eastern New Mexico University.

"My school had only 4,500 students and only 15-20 kids in each class. The class sizes were perfect and really helped me. I needed that one-on-one, and to know I could go to my professors

***"My case is different. I needed a certain kind of school. I knew I was going to need a lot of support."***

Katrina's careful efforts paid off in spades. She had the highest GPA in her class, graduated Summa Cum Laude, and earned a Bachelor of Science degree in Early Childhood Education. Today, she is a special education preschool teacher working with 3-5 year-olds.

"I've always wanted to be teaching, but especially on the special education side since I have a learning disability. It's great



*Katrina Radosevich, right, achieved her dream of becoming a special childhood education teacher.*

anytime and say 'I don't understand.' Without that support, I might not have been successful," said Katrina.

to let these kids know that they can make it. I'm also helping their parents learn how to be an advocate for their children, which is awesome," said Katrina.

"When I first walked into the Daniels Scholarship program, I didn't know much about Bill Daniels. Each year I went back as a mentor to other Scholars and I learned how generous he was. He taught me that if you make a mistake, it's ok – try again and never give up. If someone needs help, reach out and help them. Each day I want to impact these children's lives, their parents' lives, the community – just like Bill Daniels did."

## GRANTS

# Adam

## Turning his life around with a hand up from Step 13

While other teens his age might have been struggling with solving math problems, Adam was struggling with a drug addiction. "The first time I smoked pot was in 5th grade. The first time I did cocaine I was in 7th grade. By the time I was in 8th grade, I was doing crystal meth. I was a full blown addict by the time I was 15," said Adam.

To support his addiction, Adam stole from his family, ultimately burning bridges with every family member. If he came around, they would call the cops on him. Only his mother would talk to him.

Eventually Adam started selling drugs. He got involved with individuals making meth and started shooting up. His stealing became more serious, often landing him in jail. When he wasn't in jail, he found himself living on the streets much of the time. "My life had become a mess," he said. "I didn't care who I stole from or who I ripped off. I've had more guns and weapons in my face than I care to remember," he said.

One day, sitting in a cop car after being arrested for stealing, feeling like he was "on death's door," Adam decided he was ready to be done with it all. From jail, he contacted Step 13, a transitional living program that helps addicted homeless men give up their dependency and become productive members of society. Bill Daniels supported Step 13 during his lifetime and the Daniels Fund has continued that support with grants totaling \$509,000.

Three days after Adam's release from jail, he moved into Step 13. "That's where my life changed," said Adam.

Step 13's slogan is "a hand up, not a handout." The organization allows residents to stay as long as necessary,



Adam and his mother are thankful for the second chance he received through a program supported by the Daniels Fund.

provided they stay drug and alcohol free, get a job, pay a small rental fee, attend three support meetings per week, buy their own food, and clean up after themselves. "I didn't need a handout. I would have just taken it for granted," says Adam. "Having to be in those meetings made me accountable."

Step 13 gave Adam the structure and confidence he needed to get back on his feet. A big stumbling block for him was his teeth, which had deteriorated and become blackened from his drug use. "I hadn't smiled in years," said Adam. "I didn't like talking to people because they could see my teeth. Step 13's dentist did enough work in my mouth for me to be able to get out there without scaring people, to get out and get a job. Just the fact that my teeth looked better made me feel like a new person."

Today, Adam has been sober for three years. He's also held down a good-paying, stable job for more than two years. He's just dollars away from being debt free,

### Funding Area **ALCOHOLISM & SUBSTANCE ABUSE**

#### Objective:

Ensuring youth and adults with alcohol and substance abuse challenges achieve stability.

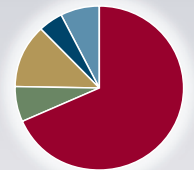
#### Focus areas:

Prevention (emphasis on youth), Treatment, Supportive/After-Care Services

Total grants – Alcoholism & Substance Abuse since inception **\$18,824,183**

Total # of grants – Alcoholism & Substance Abuse since inception **259**

Total grants – Alcoholism & Substance Abuse in each state since inception



Colorado	<b>\$12,908,939</b>
New Mexico	<b>\$1,277,810</b>
Wyoming	<b>\$2,380,180</b>
Utah	<b>\$858,753</b>
National	<b>\$1,398,500</b>

2009 grants – Alcoholism & Substance Abuse **\$2,427,654**

2009 # of grants – Alcoholism & Substance Abuse **43**

and he's even in the process of buying his own house. His family is talking to him again, and he and his dad have a very close relationship today.

"Step 13 gave me the place to stay where I could prove to people that I could be trustworthy and be a good person again," said Adam. "I would not be who I am today without Step 13."

## GRANTS

# Lorrie

*Maintaining her independence with the help of Meals on Wheels*



Lorrie, left, welcomes Larry, a volunteer from the Meals on Wheels program.

Meals on Wheels of Greeley is one of more than 50 meal delivery programs across our 4-state region that combined

Driving to the grocery store to buy food. Walking into the kitchen to fix meals. These are actions many of us take for granted. However, they can be challenging for seniors like Lorrie. Lorrie lives by herself, she hasn't driven in five years, and ever since her knee surgery four years ago, she's had difficulty getting around. "There have been times when I haven't felt well enough physically to be able to fix [food] for myself," she explained.

Lorrie depends on Meals on Wheels to deliver warm, nutritious meals to her home every day. "The warm food – it's really something that I wouldn't have without Meals on Wheels," she said. "I wouldn't be eating this well at all."

Lorrie's not alone. In 2009, Meals on Wheels of Greeley served 54,134 meals to 1,810 individuals like her, many of whom are homebound. 90% of the organization's clients are elderly.

have received more than \$3.1 million in support from the Daniels Fund over the last 10 years. A common goal across the many providers is to help older adults remain independent in their homes as long as possible, something that Bill Daniels cared deeply about. For Lorrie, the program has helped her do just that. "My husband passed away over 15 years ago.

I've been in this house 15 years. You really get accustomed to that. I wouldn't like to move," she said.

For most of these meal delivery programs, volunteers are their lifeblood. Meals on Wheels of Greeley has more than 100

volunteers who deliver up to 150 warm meals each day to people throughout Weld County. Larry, a volunteer who delivers Lorrie's meals to her, "went out on a route one day with another volunteer and got hooked." Now he delivers five days a week. Not only do volunteers like Larry deliver

***"The warm food – it's really something that I wouldn't have without Meals on Wheels. I wouldn't be eating this well at all."***

## Funding Area **AGING**

### Objective:

Ensuring older adults achieve maximum independence and quality of life.

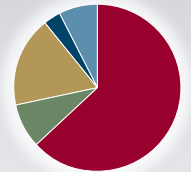
### Focus areas:

In-Home Services, Community Engagement, End of Life/Palliative Care

Total grants paid – Aging since inception **\$15,960,047**

Total # of grants – Aging since inception **395**

Total grants – Aging in each state since inception



■ Colorado	<b>\$10,097,329</b>
■ New Mexico	<b>\$1,368,235</b>
■ Wyoming	<b>\$2,802,235</b>
■ Utah	<b>\$514,325</b>
■ National	<b>\$1,177,923</b>

2009 grants – Aging **\$3,049,775**

2009 # of grants – Aging **73**

food, they also provide a daily check on the well-being of the people being served. Meals on Wheels of Greeley volunteers are instructed to never just leave the meals. "We have to see each client every day because often we're the only ones they see," explained Larry.

For people like Lorrie, the volunteers are her favorite part of the program. "I enjoy the food, but Larry is always so responsive and enjoyable, uplifting, he's got a good attitude, and it's nice to see somebody," she said.

GRANTS

# Jacob *Utilizing his education to help his New Mexico community*

Jacob grew up in a working class neighborhood in Albuquerque, New Mexico. Raised by a single mother, he and his mom lived with his grandmother for much of his childhood. Jacob remembers learning at an early age his family's concern with the area's public schools. "The schools in and around my neighborhood were pretty crowded, with a history of low academic achievement," he said. "My family wanted me to be in an environment with high expectations."

So his family worked hard to pay for a private, Catholic education, from elementary through middle school. However, the cost to attend private high school was out of reach.

That's when Educate New Mexico came in to the picture. The organization works to promote and finance excellent educational opportunities for students from families with modest incomes. The Daniels Fund has given a total of \$560,000 in grants to the organization, providing scholarships to more than 500 youth.

Educate New Mexico offered Jacob a four-year scholarship to attend high school. The scholarship didn't cover all the costs, but it made it possible for his family to afford the school. "My family fell into the donut hole effect," said Jacob. "We didn't make so much that it would be easy to afford the school, but we also didn't make so little that we required complete aid. Educate



*Educate New Mexico helped Jacob, left, get to where he is today, helping the people of New Mexico through the state's Legislative Finance Committee.*

New Mexico really helped cover that gap and make it possible."

Educate New Mexico's investment in Jacob's education has more than paid off. He graduated from high school in the top 10% of his class. He was accepted into Princeton, where with the help of financial aid and his stepfather's growing business, he graduated with a degree in Public and International Affairs. He then returned to his home state, where

he now works on issues that challenge New Mexico's people.

In addition to his job with the state's Legislative Finance Committee, Jacob volunteers with two legal organizations where he's researching issues that impact low income New Mexicans, including why the state has the highest percentage of uninsured women with children in

***"My family wanted me to be in an environment with high expectations."***

Funding Area **EDUCATION**

**Objectives:**

**Early Childhood Education** – Improving the quality of the early childhood education system to ensure quality and school readiness.

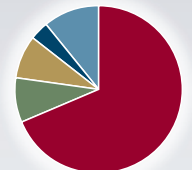
**K-12 Education Reform** – Improving the quality of the K-12 educational system to ensure increased student achievement.

**Ethics & Integrity in Education** – Impacting the quality of ethics curriculum to foster principle-centered leadership.

Total grants – Education since inception **\$76,760,809**

Total # of grants – Education since inception **1,604**

Total grants – Education in each state since inception



Colorado	<b>\$52,756,979</b>
New Mexico	<b>\$6,657,100</b>
Wyoming	<b>\$6,294,904</b>
Utah	<b>\$2,743,292</b>
National	<b>\$8,308,533</b>

2009 grants – Education **\$5,985,318**

2009 # of grants – Education **123**

the country. "These are issues I'm very passionate about," he said. Jacob intends to return to school to obtain a law degree.

"Educate New Mexico was a great help to my family. They give families a hand up – working families who want the ability to send their kids to a school that will provide their child with the opportunity to succeed. I am very thankful to them," said Jacob.

## SCHOLARSHIPS

# Andre

*Following his heart to help people*

Volunteer Firefighter. Nonprofit Board Member. FBI Special Agent. Andre McGregor is proud to carry all of these titles. He's also grateful to the Daniels Scholarship program for helping lead him down the road that brought him to these and other rewarding experiences.

Andre grew up in Denver and went to Denver Public Schools. He always planned to attend college, especially after watching his older brother become the first in their family to get a college degree. "My brother came back after college to help out with the family and wanted to make sure I was on the same path," said Andre.

Andre was definitely on the right path, having applied to and been accepted to many universities, including Brown University on

the East coast. "But I didn't have the money or scholarships to go there," said Andre. Then he applied for and was awarded a Daniels

Scholarship, becoming one of the first Daniels Scholars when the program started in 2000. The scholarship enabled Andre to go where he really wanted. "With the Daniels Scholarship, I decided to try Brown – it would allow me to step out of my comfort zone, to be out of state and try to survive," he said.

Brown turned out to be a great experience for Andre. He graduated with a degree in Political Science and landed a job on New York's Wall Street right out of college.

That job, along with a few others he tried, helped him realize that his heart wasn't in the for-profit world. "With everyone who was always helping me, my heart was with

helping people," said Andre.

Eventually Andre was hired to work for the FBI where he works today in the cyber crimes unit. "I've gotten back to helping people by locking up very bad criminals. It's rewarding. At the end of the day, we do good work. I'm loving it," he said.

Andre now calls New Jersey home. There he's involved in the local community as both a

***"I try to do as much as I can in the community because everyone in the community helped me."***

volunteer firefighter and a volunteer EMT. He loves those roles and speaks of the countless number of lives he has helped. Andre also remains involved in the Denver community, where he serves on the advisory board for Environmental Learning for Kids, a Denver nonprofit that works with youth development through natural resource education and conservation. Once a program participant when he was a boy, he has remained involved with the organization ever since.

"I try to do as much as I can in the community because everyone in the community helped me," said Andre. "One



*The Daniels Scholarship opened up a world of opportunity for Andre McGregor.*

regret I have is that I never got to meet Bill Daniels. A man who would be willing to give so much to so many people he never met – it says a lot in itself. Bill Daniels has helped Colorado more than I think he thought he could."

## GRANTS

# Juan

## Boxing his way out of becoming a high school dropout

Bill Daniels believed that the teamwork and discipline instilled through participation in sports had the power to change the direction of a young person's life. That's precisely what it did for Juan.

Juan was on the verge of dropping out of high school last year. He rarely attended his classes and his grades were poor. His older brother had already dropped out and Juan planned to do the same. That is, until the day Chet Alexander, local police officer and volunteer boxing coach, gave a talk about a new youth boxing program in the Evanston, Wyoming community.

The Evanston Youth Boxing program is open to all youth, but specifically targets kids who are at risk. The program encourages participation in a competitive boxing atmosphere, an environment which teaches the youth about good sportsmanship, team unity, and self-respect. Youth are encouraged to attend practices four nights a week. The Daniels Fund has awarded grants totaling \$27,647 to the program.

For Juan, the program was a perfect fit, but there were some expectations he would have to meet. "We have a policy that if you don't maintain a C in every class, you don't box," said Chet. "We really push the books. We teach the kids that if you're not smart upstairs, you're going to be dumb in the



Juan, center, turned himself around thanks to a Wyoming youth boxing program and coaches Chet, left, and Steve.

ring." The youth are also required to sign a code of conduct and remain drug and alcohol free.

The approach works. "We're really seeing an improvement in these kids' grades once they stick with the program," said Chet. For Juan, it has meant a complete turnaround. Being part of the program has driven him to work hard to improve his grades and to think differently about school. "Back then I didn't pay attention. Now I see that school's worth finishing, and I plan on getting out of high school," said Juan. Today, he has nearly straight A's. "Last year the kid was about out the door," said Chet. "Now all of a sudden this year he's 100% attendance – not even one single tardy since day one of the school year. The dean of grades is just shaking his head that he can't believe it!"

### Funding Area **AMATEUR SPORTS**

#### Objective:

Expanding opportunities for participation in quality youth sports programs that foster sportsmanship, confidence, discipline, and teamwork. In addition, we support programs that expand opportunities for national and international amateur sports competition.

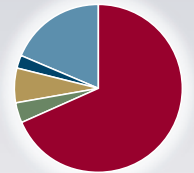
#### Focus areas:

Youth Sports, Competition

Total grants – Amateur Sports since inception **\$14,787,016**

Total # of grants – Amateur Sports since inception **287**

Total grants – Amateur Sports in each state since inception



Colorado	<b>\$10,138,890</b>
New Mexico	<b>\$567,175</b>
Wyoming	<b>\$990,377</b>
Utah	<b>\$361,250</b>
National	<b>\$2,729,324</b>

2009 grants – Amateur Sports **\$4,848,020**

2009 # of grants – Amateur Sports **36**

Juan has also been recognized as a model student for demonstrating his school's pillars of character, which include citizenship, trustworthiness, loyalty, responsibility, and volunteerism.

"It's really cool when you get a kid like Juan who thinks he won't accomplish anything and then he turns around," said Chet. "He is going to graduate, I know it."

## GRANTS

# Max

*Learning how to hear with the help of the Bill Daniels Center for Children's Hearing*

Lisa never thought her young son, Max, had a problem with his hearing. "He seemed to respond to sound and music," she said. But when he never developed speech and failed a hearing test, doctors said that he was likely deaf. Lisa couldn't believe it. Eventually, Max was diagnosed with Auditory Neuropathy, a hearing disorder in which sound enters the inner ear but the brain doesn't process the sound. For Max, it was like listening to a car radio in between stations – the sounds were there but without a clear signal.

Max's parents were advised to try cochlear implants, surgically implanted electronic devices that provide a sense of sound to a person who is profoundly deaf or severely hard of hearing. They work by taking the incoming sounds and changing them to electrical pulses which are then sent to the brain.

A surgeon near Max's home in New Jersey implanted a cochlear device in one of Max's ears. The other ear wasn't done due to concerns that it might compromise an earlier surgery.

With the one implant in, Max could hear sounds more clearly, but his brain still had trouble processing them due to competing sounds from the un-implanted ear. With only one ear working, it was difficult for him to tell where the sounds were coming from. That was hindering his progress in hearing things properly and in learning how to speak.

When Max's family relocated to Colorado to find better services and school programs for him, they found the Bill Daniels Center for Children's Hearing, which provides comprehensive diagnostic and treatment services for children who are deaf or hard-of-hearing. The Daniels Fund helped establish the center in 2005 with a \$2



*Max visits the hearing center regularly so Cochlear Implant Program Specialist, Jennifer, can perform hearing tests and make necessary adjustments.*

million, 10-year grant. Bill Daniels' own hearing loss formed a strong catalyst for the grant.

At the Children's hearing center, Max's family found a world of help and support for dealing with his situation. Most importantly, Children's brought together specialized surgeons who collaborated in the operating room to successfully implant Max's second ear with a cochlear implant. "They are the greatest team of people I've encountered in the area of deafness," said Lisa. The center has also helped connect the family with various programs, discussions, and people to help make their lives better.

Today, Max is 7 years old, and with the second implant, he is already showing improvement. "He's hearing better because actual sound is coming in the second ear," said Lisa, and he can tell where sounds are coming from. Now "he can differentiate between the names of the family by the syllable and the vowel sound that goes with it," said Lisa.

Funding Area **DISABILITIES****Objective:**

Ensuring physically and developmentally disabled individuals and their families achieve maximum independence and quality of life.

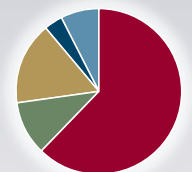
**Focus areas:**

Developmental Disabilities, Physical Disabilities

Total grants – Disabilities since inception **\$10,465,214**

Total # of grants – Disabilities since inception **291**

Total grants – Disabilities in each state since inception



■ Colorado	<b>\$6,518,155</b>
■ New Mexico	<b>\$1,110,279</b>
■ Wyoming	<b>\$1,692,200</b>
■ Utah	<b>\$368,575</b>
■ National	<b>\$776,005</b>

2009 grants – Disabilities **\$1,092,726**

2009 # of grants – Disabilities **51**

Max still has a long way to go in terms of hearing. Because the sound is converted to electrical pulses, Max's brain has had to start from scratch to learn what those pulses mean. "It's a lot of training to teach a kid how to make their brain understand what their ear is processing," said Lisa. But the family has found the right partner to help them in their goal of giving Max the best possible quality of life and giving him the gift of hearing.



## SCHOLARSHIPS

# Theresa

*Proving that it's never too late to finish school*

Theresa Bradley is a member of the Navajo Tribe. Following traditional Navajo culture, her parents encouraged her to go to school, despite the fact that they required a great deal of help caring for their land and livestock. At their urging, Theresa decided to give college a try after high school, moving to a college six hours away.

Unfortunately, Theresa's parents were older and in declining health. She found herself continually returning home every weekend to help them. To get closer to her parents, she transferred to a school three hours away, but the costs of living in that city were prohibitive and, after awhile, forced Theresa to quit school in order to work full time and cover her bills.

Theresa continued to stay close to home to care for her parents, eventually losing both of them. "It has been a long and hard road

***"It took me many years to finally finish, but my advice to young students or returning students is that it is never too late."***



given me."

Remembering her parents' advice and recognizing the importance of getting a college degree, Theresa moved to Utah to return to school and finish her college education. There, she was awarded a Daniels Opportunity Scholarship from

Salt Lake Community College. Theresa successfully earned an Associate's degree from the Community College and then transferred to the University of Utah, where another Daniels Opportunity Scholarship helped her earn a Bachelor of Science degree in Business Administration.

Today Theresa works in the accounting department for another Native American tribe, which she enjoys because she feels like she is giving back. She is engaged to be married and she and her fiancé have a daughter

who "drives us to be the best we can for her every single day," said Theresa. They also recently bought their first home.

"All this could not have been possible without finishing school. It took me many years to finally finish, but my advice to young students or returning students is that it is never too late," she said. Theresa strives to be a role model for her nieces and nephews, advising them "if you want to go to school, it's always possible. There are lots of scholarships out there to help you."

"The Daniels Fund Scholarship was such a blessing to receive and I am very, very thankful. It gave me the drive and determination to achieve my goals and I'm



*The Daniels Opportunity Scholarship, which serves non-traditional students, was the pathway to success for Theresa Bradley.*

very fortunate to be working for another Native American tribe. The Daniels Fund has helped me tremendously and it has been an honor to be part of the scholarship program."

## GRANTS

# Crystal

*Creating a better life for herself and her children*

Crystal was a single mom with nine kids, barely getting by on her salary as a catering service manager. She lived in a small, rented trailer that wasn't large enough for her family, so the kids went back and forth with her ex-husband.

With thousands of dollars in credit card debt and behind on her trailer rent, Crystal wanted to

earn more money to better support herself and her family. However, she lacked the confidence to go anywhere else. "I didn't even have a GED. I couldn't see that anybody would value me. I didn't have the education and the catering company didn't require it. I stayed there because I didn't see I could go anywhere else," said Crystal.

That's when she was introduced to People Helping People (PHP), a Utah organization that helps low-income women, primarily single moms, build better futures for themselves and their children through long-term successful employment. 100% of the women served by PHP live below the poverty line. The Daniels Fund has provided \$20,000 in grants to the organization.

People Helping People's Successful Employment Program helped Crystal realize that she had many valuable skills to offer. She attended several PHP training



*A Utah program assisting low income women provided Crystal with the opportunity to put her family on the path to success.*

classes on resumes, interviewing, dressing for success, and others. Weekly she met with a mentor, who most importantly was "somebody who believed in me," said Crystal, and provided her with support and encouragement. "They helped me see I could do anything I set my mind to," said Crystal. "PHP helped me realize what I was capable of and that I was a commodity that someone might want."

PHP also helped her find an opportunity to apply for a higher paying job driving big trucks for a large mining company. "I saw the job requirements and I was intimidated," she said. Eventually she applied, but was rejected because "I didn't have a GED." Crystal didn't let that stop her. She got her GED and applied again, this time with success.

Today, Crystal is a driver for the mining company. She more than doubled her income which enabled her to buy a house and a car. Three of her daughters are the

## Funding Area **HOMELESS & DISADVANTAGED**

### Objective:

Ensuring that homeless individuals and families achieve and maintain self-sufficiency.

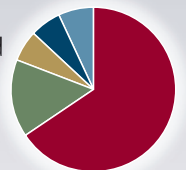
### Focus areas:

Emergency Services, Transitional Housing with Supportive Services

Total grants – Homeless & Disadvantaged since inception **\$49,485,978**

Total # of grants – Homeless & Disadvantaged since inception **1,806**

Total grants – Homeless & Disadvantaged in each state since inception



Colorado	<b>\$32,482,148</b>
New Mexico	<b>\$7,654,150</b>
Wyoming	<b>\$2,995,230</b>
Utah	<b>\$2,962,391</b>
National	<b>\$3,392,060</b>

2009 grants – Homeless & Disadvantaged **\$7,999,519**

2009 # of grants – Homeless & Disadvantaged **388**

first in the family to go to college. Crystal decided to join them as well and is working toward a degree in mining engineering, with her company paying for 75% of her schooling. "My twins were really struggling in school. It has been really good for my kids to see me in school. I keep telling them you don't want to be doing this when you're 40," said Crystal.

GRANTS

# Tazmil & Marilyn *Building skills for a financially responsible future*

Amid a world troubled with overwhelming debt, 16-year-old Tazmil is a shining star of hope. Tazmil is hard at work saving his money, and according to him his saving account is “doin’ pretty good.”

Tazmil is a customer at Young Americans Bank, the only bank in the world specifically designed for young people. He’s had an account there nearly his entire life, thanks to his mom, Marilyn, who was one of the Bank’s first customers when it opened in 1987.

Young Americans Bank was the brainchild of Bill Daniels, founder of the Daniels Fund. Bill opened the Bank 23 years ago with the goal of teaching young people about our financial and economic system. Of the Bank’s 15,000 accounts, more than 90 percent are savings with an average balance just over \$550. That’s because education, not profit, is the Bank’s mission. That also means the bank requires an annual subsidy, which Bill directed the Daniels Fund to provide.

Starting Young Americans Bank was one of Bill Daniels’ proudest accomplishments, and both Marilyn and Tazmil are proof that the concept works. At age 20, Marilyn had racked up debt from several credit cards she opened while in college. She heard about Young Americans Bank, which had just opened, and thought they could help her learn what to do about her debt.

“As a customer, what Young Americans



*Tazmil received a solid grounding in financial skills as a second generation customer at Young Americans Bank.*

Bank taught me the most was the importance of paying on time,” said Marilyn. She also joined the bank’s youth advisory board, which taught her how a bank functions and opened her eyes to all that Young Americans Bank had to offer to young people. Later in life, wanting her son, Tazmil to benefit from it all, she opened him a savings account when he was 3 months old.

Tazmil puts aside a large portion of his allowance for savings, and he and his mom make a deposit every month at Young Americans Bank. “The Bank has taught me how to save my money, whether it be dollars or change,” said Tazmil. “When I was little, I had a Barney piggy bank and I saved all my coins in there. I still do the same but now it’s in jars. The Bank taught me how much it really adds up.”

Tazmil’s experience with Young Americans Bank has taught him important money skills. “I feel like I’ve managed my money better than my friends,” he said. “When I do stuff with them, they

Funding Area **YOUTH DEVELOPMENT**

**Objective:**

Providing the opportunity for youth to develop character and gain the necessary life skills to become successful adults.

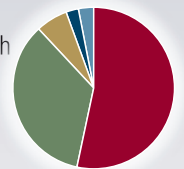
**Focus areas:**

Academic & Supplemental Services, Civic Literacy & Community Engagement, Financial Literacy & Entrepreneurship, Career and Technical Education

Total grants paid – Youth Development since inception **\$74,381,879**

Total # of grants – Youth Development since inception **1,196**

Total grants – Youth Development in each state since inception



■ Colorado	<b>\$39,692,286</b>
■ New Mexico	<b>\$25,961,393</b>
■ Wyoming	<b>\$4,607,474</b>
■ Utah	<b>\$2,040,926</b>
■ National	<b>\$2,079,800</b>

2009 grants – Youth Development **\$5,834,323**

2009 # of grants – Youth Development **168**

never have any money and I always seem to. Maybe it’s because I learned how rewarding it is to save my money and they haven’t grasped that yet.”

His mom agrees. “Young people spend their money on clothes, food, and music right now. I’ve seen him weigh his options, especially at this age. He understands that you have to save to reach what you want,” she said.

# Financial Summary

	December 31 (unaudited)	
	2009	2008
<b>ASSETS</b>		
Investments, at market value	\$ 1,116,023,917	\$ 945,796,135
Property and equipment, net of depreciation	15,355,728	15,764,755
Other assets	101,100	102,117
	<u>\$ 1,131,480,745</u>	<u>\$ 961,663,007</u>

	Years Ended December 31 (unaudited)	
	2009	2008
<b>REVENUES</b>		
Investment income	\$ (24,749,359)	\$ 162,866,992
Realized gains (losses) on sale of investments	(41,139,205)	(26,750,126)
Unrealized gains (losses) on investments	284,033,081	(466,514,550)
Other revenue	4,685	2,942,130
	<u>218,149,202</u>	<u>(327,455,554)</u>
<b>EXPENSES</b>		
Grants paid	31,883,950	38,230,364
Scholarships paid	10,748,413	11,966,291
Administrative expenses	6,200,186	6,849,993
Investment management expenses	857,478	812,330
Excise and income taxes	(1,911,945)	6,324,857
Depreciation expense	559,382	719,679
	<u>48,331,464</u>	<u>64,903,514</u>
Change in assets	<u>\$ 169,817,738</u>	<u>\$ (392,359,068)</u>

## 2009 Daniels Fund Tax Return

The 2009 Form 990PF and listing of grants are available, once completed and filed with the IRS, on the Daniels Fund website at [www.danielsfund.org/publications](http://www.danielsfund.org/publications).

For more information, please visit our website.



# Spotlight



## DANIELS FUND BOARD OF DIRECTORS

*Seated, left to right:*

**James Griesemer**, Professor and Dean Emeritus, Daniels College of Business

**Daniel Ritchie**, Chairman, Denver Center for the Performing Arts; Chancellor Emeritus, University of Denver

**Linda Childears** (President/CEO)

**Jim Nicholson**, Senior Counsel, Brownstein Hyatt Farber Schreck; Former Secretary, Department of Veterans Affairs

*Back row from left:*

**Diane Denish**, Lieutenant Governor, State of New Mexico

**June Travis**, former cable television executive

**Tony Acone**, Chairman, La Jolla Networks

**Tom Marinkovich**, former cable television executive

**Hank Brown** (Chairman of the Board), Past President, University of Colorado

**Brian Deevy**, Chairman and CEO, RBC Daniels, LP

**Steve Schuck**, Chairman, The Schuck Corporation

**Gayle Greer**, former cable television executive and community volunteer

## Grant Helps Build Police Activities League Headquarters

The new Jerry Kennedy Police Activities League (PAL) Headquarters is a place where kids, cops, and coaches come together to build a future filled with hope and purpose.

Located at Valverde Park in west Denver, the state-of-the-art facility and athletic fields are funded through a \$5 million grant from the Daniels Fund. The grant honors specific direction left by Bill Daniels in his estate. Daniels left additional funds to PAL in a separate part of his estate that resulted in a total of \$7 million for the project.

“The board knew that Bill Daniels always believed in PAL,” said Linda Childears, President/CEO of the Daniels Fund. “It offered a perfect combination: It gave kids something to do, and it allowed cops to be role models. He liked that kids left PAL admiring and respecting police officers.”

Jerry Kennedy was a division chief for the Denver Police and a long-time friend of Bill Daniels.

## 2009 HIGHLIGHT

### The Daniels Fund Launches Ethics Initiative Across 4 States



A \$7.5 million grant established the Daniels Fund Ethics Initiative in late 2009. The Initiative brings 8 colleges and universities in Colorado, New Mexico, Utah, and Wyoming together to further strengthen principle-based business ethics education for students.

The schools have formed a consortium

that collaborates on developing programs and curriculum designed to instill a high standard of ethics in business school students.

“Bill Daniels considered achieving a reputation for integrity and being ethical in business as the greatest accomplishments in his life,” said Linda Childears, Daniels Fund President/CEO. “He dedicated himself to sharing this message in a variety of ways, including collaborating with the University of Denver to establish the Daniels College of Business to incorporate ethics, values, and social responsibility in the business school curriculum.”

## Daniels Fund Meeting Space

Since 2004, the Daniels Fund has offered the use of its public meeting spaces free-of-charge to nonprofit organizations. Since that time, more than 1,200 different organizations and more than 80,000 people have taken advantage of this free community resource.

For more information, please visit our website.





## DANIELS FUND

*Making life better... one individual at a time.*

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