



Annual Report

Presented October 7, 2017

Data in this report cover activities
from October 15, 2016 through September 30, 2017

This report is prepared for the Annual Meeting of the
Texas Speech-Language Hearing Foundation
Dallas, Texas

TEXAS SPEECH-LANGUAGE-HEARING FOUNDATION

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BOARD OF DIRECTORS

Executive Board

President	Jennifer Watson	Fort Worth	2010
Past President	Sherry Sancibrian	Lubbock	2008
President Elect	Melinda Corwin	Lubbock	2011
Treasurer	Debbie Sears	Brownsville	2010
Secretary	Dee Kirby	Abilene	2011

General Directors

Finance Committee	Debbie Sears	Brownsville	2010
Scholarship Awards	Katsura Aoyama	Denton	2015
Research Grants	Jan Lewin	Houston	2016
Service Awards	Judy Erwin	Grand Prairie	2013
Education	Lori Coletti	Fort Worth	2016
Communications	Gina Glover	Fort Worth	2015
Annual Event	Lynn Flahive	Arlington	2015
Fund Development	Donise Pearson	Dallas	2015
Auction/Raffle	Dee Kirby	Abilene	2011
	Melissa Sweeney	Dallas	2016
Member at Large	Ann Higdon	Austin	2013

Ex-Officio

Founding Director: Anne Mauzy (Austin)
Director Emeritus: Joan Lynch (Houston)
TSHA President: Judy Rudebusch (Irving)

Advisory Board

Marguerite Burtis
Peter Vogel
Joe Patti

HISTORY OF THE FOUNDATION

1985. The Texas Speech-Language-Hearing Foundation (TSHF) was established by TSHA with the first Board of Directors composed of TSHA officers: Richard Stream, Mary Lovey Wood, Joseph Helmick, and Robbin Parish. The creation of a nonprofit foundation appeared necessary because Braniff Women's Auxiliary had endowed a scholarship fund to support speech-language-pathology students enrolled in any of four North Texas universities. Between 1985 and 1992 three \$500 scholarships were awarded.

1992. Anne Mauzy was appointed by Sandy Friel-Patti (TSHA president) to re-organize the TSHF. The first Board of Directors consisted of Anne Mauzy, President, Tina Bangs, Vice-President; and Larry Higdon, Publicity. Carolyn Wells was soon added to the Board. The Foundation was incorporated as a 501 (c)(3) charitable organization. Cash in hand was \$19,309. When Anne Mauzy left the presidency three years, later the cash in hand plus total pledges equaled \$100,000. The current program of activity was in place.

Past Presidents

Anne Mauzy (1992-1994)
Larry Higdon (1995)
Joan Lynch (1996-1999)
Sandy Friel-Patti (2000-2002)
Gilbert C. Hanke (2002-2006)
Carolyn McCall (2006-2009)
Sue Shirley-Howard (2009-2011)
Peggy Kipping (2011-2013)
Sherry Sancibrian (2013-2015)

VISION (updated June 2016)

Helping people with communication disorders achieve their potential

MISSION (updated June 2016)

The Texas Speech-Language-Hearing Foundation improves
the lives of people with communication disorders
by supporting research, education, and service endeavors on their behalf

EFFORTS TO FULFILL THE VISION AND MISSION OF THE TEXAS SPEECH-LANGUAGE-HEARING FOUNDATION

Presentation of Awards Totaling \$28,300

At the 2017 TSHA Convention in Austin, the TSHF honored several individuals with scholarships, research, and service awards. These students and professionals from across the state represent the future of our professions, and the Foundation is privileged to recognize them.

Scholarship Awards

Jon Ashby Scholarship – Jessica DeVries
Madeline Brand Scholarship – Daisy R. López
Braniff Clipped B's Scholarship – Alexandra McLendon
Jeanne Braniff Terrell Scholarship – Sylvia Gonzalez
Elizabeth Carrow-Woolfolk Scholarship – Sarah Sauseda
Margaret Cooper Crabtree Scholarship – Arlyn Garza
Donna Russell Fox Scholarship – Boji P.W. Lam
Gardner Gateley Scholarship – Morgan Jones
Gilbert Hanke Scholarship – Mia Flores
Sara Haynes Scholarship – Christopher Johnson
Larry Higdon Scholarship – Marcy K. Lau
Judith Keller Scholarship – Asia Mitchell
Grace Middleton Scholarship – Briana Martinez
Sherry Sancibrian Scholarship – Miranda Parker
San Antonio SLHA Scholarship – Brittany Boandl
Sondra's Money Scholarship – Courtney Humphreys
Elnita O. Stanley Scholarship – Courtney Bobalik
Empress Zedler Scholarship – Caroline Childress

Research Grants

Lear Ashmore Research Endowment

Heather Dial, The University of Texas at Austin

Presidents' Research Endowment

Caitlin Baker, The University of Texas at Austin

Tina E. Bangs Research Endowment

Kendra Gonzalez, Our Lady of the Lake University

Sandy Friel-Patti International Travel Fund

Boji Pak Wing Lam, The University of Texas at Austin

Service Awards

Marguerite Burtis-Peter Vogel/Suzanne Elkins

Community Service Award

Courtney Byrd

TSHA Young Leadership Award

Courtney Garcia

Carolyn Wells Service Award

Peggy Kipping

Educational Programs

The Oscar Mauzy Leadership Conference conference is a collaboration between the Texas Speech-Language-Hearing Foundation and the TSHA Executive Board, and serves as a training opportunity for leadership growth and development for both organizations. The conference is named for Oscar Mauzy (1926-2000), a Texas state senator from Dallas (1966-1986) and former justice of the Texas Supreme Court (1987-1992). He was well-known to speech-language pathologists and audiologists across the state for his dedication to our causes, and also for his good fortune in marrying Anne Rogers Mauzy, a speech-language pathologist, who is now Director Emerita of the Texas Speech-Language-Hearing Foundation.

The year of 2017 was a planning year for the 2018 Oscar Mauzy Leadership Conference which will be conducted in collaboration with the Texas Speech-Language-Hearing Association Leadership Academy at the TSHA Convention on March 3, 2018 in Houston. The objectives of this collaboration include the following:

- To increase the number of individuals willing to serve in a leadership role in TSHA and/or TSHF
- To increase awareness among cohort members of the TSHA organization and the importance of leaders in TSHA and TSHF
- To provide multiple opportunities for cohort members to acquire and apply information on leadership in TSHA and TSHF
- To provide opportunities for cohort members to serve in a volunteer capacity in TSHA and TSHF

CALENDARS OF EVENTS

2017-18 TSHF Calendar		
January 12, 2017	Board Meeting	Conference Call
February 22, 2017	Board Meeting	2017 TSHA Convention, Austin
February 24, 2017	TSHF Awards Event	2017 TSHA Convention, Austin
July 15, 2017	Board Meeting	Conference Call
October 7, 2017	Annual/Board Meetings	DoubleTree, Dallas
January 16, 2018	Board Meeting	Conference Call
February 28, 2018	Board Meeting	2018 TSHA Convention, Houston
March 2, 2018	TSHF Awards Event	2018 TSHA Convention, Houston
March 3, 2018	Oscar Mauzy Conference	2018 TSHA Convention, Houston
June 7, 2018	Board Meeting	Conference Call
October 2018 (date/time TBD)	Annual/ Board Meeting	TBD

2017-2018 Communicologist Calendar

Issue	Topic	Author
February 2017	Scholarship Awards Award Event Announcement	Melinda Corwin Lynn Flahive
April 2017	Service Awards	Judy Erwin
June 2017	Research Awards	Jan Lewin
August 2017	Call for 2018 Award Applications	Jennifer Watson
October 2017	Fund Development Highlights	Jennifer Watson & Donise Pearson
December 2017	Oscar Mauzy Leadership Conference	Lori Colletti
February 2018	Fund Development Highlights	Melinda Corwin & Donise Pearson
April 2018	Scholarship Recipients	Katsura Aoyama
June 2018	Service Award Recipients & Highlights	Judy Erwin
August 2018	Research Award Recipients & Highlights	Jan Lewin
October 2018	Call for 2018 Award Applications	Melinda Corwin
December 2018	Oscar Mauzy Leadership Conference TSHF Breakfast Announcement	Lori Colletti Lynn Flahive

Ongoing Goals and Strategic Plan Update

1. *Fund / Revenue Development*

- Reached \$1,000,000 in total Foundation funds/investments
- Received donations from more than 60 documented *first-time* donors
- Solicited 10 new Fellow pledges
- Several donors' gifts resulted in new levels of recognition
- Established the following new funds
 - **Larry Higdon Student Presentation Fund** (endowed)
Supports a speech-language pathology or audiology student when s/he presents at a meeting sponsored by the Texas Speech-Language-Hearing Association on a topic related to the diagnosis and/or treatment of hearing impairment and/or auditory processing.
 - **Cherry Wright Texas Educational Loan Support Trust** (endowed)
This trust supports the payment of educational loans for speech-language pathologists and audiologists employed in a public school setting in the state of Texas.
 - **TCU Communication Sciences and Disorders Scholarship Fund**
Supports a student enrolled in Texas Christian University' Davies School of Communication Sciences and Disorder in the completion of his/her academic degree.
 - **Julie Beth Noel Leadership Development Fund**
Supports a leadership development activity for designated members of the Texas Speech-Language-Hearing Association Board of Directors.
- Generated \$5928.00 through the 2017 auction/raffle
- Generated \$9531.14 at the Foundation Award Event

2. *Support TSHF's vision and mission through awarding of funds.*

- Awarded \$28,300 at the 2017 Annual Awards Event
- Awarded the **Larry Higdon Student Presentation Fund** for the first time in 2017
- Solicited nominations for the **Cherry Wright Texas Educational Loan Support Trust** to be awarded for the first time in 2018

3. *Nurture relationships with fund patrons, sponsors, fellows, and donors.*

- Hosted 2017 Awards Event at a breakfast
- Transitioned the TSHF website to be maintained under the TSHA website
- Enhanced website to facilitate donating, including giving to specific funds

- Personal notes sent to donors expressing gratitude for recent contributions
4. *Foster collaborations between TSHF and TSHA.*
 - TSHF President and the TSHA President serve as ex officio members of each other's organizational boards.
 - TSHF contributed articles to each issue of *Communicologist*
 5. *Sponsor educational programs designed to recognize current professional leaders and provide mentors for future leaders.*
 - Partnered with TSHA to co-sponsor the 2018 Oscar Mauzy Leadership Conference at the Annual Convention in Houston.
 6. *Conduct formal reviews of the financial records of the TSH Foundation on a regular schedule.*
 - Completed throughout the 2016 and 2017 year.
 7. *Develop and implement a Fund Management Policy for spending and investment to provide guidance to the TSH Foundation Board and Finance Committee.*
 - The Fund Management Policy was developed in Fall 2011 and has been implemented in subsequent years.

Report of Contributors

Updated October, 2017

Patrons – Gifts of at least \$20,000

Braniff Women's Auxiliary, Marguerite Burtis & Peter Vogel, Suzie Elkins, El Paso SLHA, Houston Association for Communication Disorders, Joan I. Lynch, Anne & Oscar Mauzy, Our Lady of the Lake University, Joseph Patti, Texas Speech-Language-Hearing Association, Elisabeth Wiig

Sponsors – Gifts of at least \$10,000

Field Family Trust, Tom Fields, Donna Fox, Marilyn Johnson, San Antonio SLH Association, Sherry Sancibrian, Molly Shanks, Sue Shirley Howard, South Plains SLH Association, Texas Tech University HSC NSSLHA, TSHA Past Presidents, Cherry Wright and James Bradford

Sustaining Fellows – Gifts of at least \$3000

Madeline Brand Estate, Baylor University, Frank Brister, Shannon Butkus & David Riggs, Butkus Associates, Cynthia Campbell, Elizabeth Campos, Deborah Card, Melinda Corwin, Karen Craig, Delva Culp, Jane Davidson, Peggy Engman, Jeanne Haben, Gil Hanke, Ann & Larry Higdon, Judith Keller, Peggy Kipping, Dee Kirby, LinguiSystems, Carolyn McCall, Martha McGlothlin, Julie Noel, Sharon Parsons, Donise Pearson, Barbara Rosenberg, Judy Rich, Speech Therapy Group, Therapy 2000, Jennifer Watson

Supporting Fellows – Gifts of at least \$2000

Mary Ann Acevedo, Marty Adams & Mary Curl, Denise Barringer, Ron Bender, Linda Bowers, MaLesia Breeding, Burtis & Noel, Inc., Jenny Clark, Carol England, Judith Erwin, Lynn Flahive, Mary Johns, Tedi Johnson, Judy Kyker, Pamela Laing, Loretta Lee, Lynn Maher, Carol McClendon, Scientific Learning Corporation, Debbie Sears, Elnita Stanley, Helin Turnipseed, Ellen Wagstaff, Thelma Zirkelbach

Fellows – Persons who have given \$1,000 in a ten-year period

Jon Ashby, Lear Ashmore, Martha Ashworth, Benna Askew, Terry Baggs, Rita Baker, Debra Bankston, Lynda Barbee, Denise Barnett, Pamela Bass, Erin Bellue, Kathryn L. Blakesley, Lynn Bliss, Buffy Boga, Daryl Boothe, Bonnie Brookshire, Sheila Brown, Mary Irene Burtis, Bert Campbell, Don Canada, Susan Carlson, Angie Carter, Sandra Bond Chapman, Betty Clark, Beth Coletta, Lori Colletti, Mary Cooper, Judith Cull, Maria D'Antoni, Claudia Davis, Julie Duncan, East Texas SLH Assn, Lisa Famiglietti, Kathryn Farris, Sandy Ferguson, Ron Gillam, Vic Gladstone, Good Fulton & Farrell, Inc, Beverly Hall, Jim Hall, Jr., Kimberly Vaught Hancock, Sally Hawkins, Terri Haynes, Barbara

Hodson, Janet Holt, Irene Immerman, Lisa Irvin, Deloris Johnson, Jane Kane, Molly Keebler, Debra Kerner, Karen King, Joan Klecan-Aker, Gladys Kolenovsky, Bruce & Margaret Ladtkow, Hettie Legg, Meg Luken, Michelle Lynn, Melody Martin, Margaret McAughan, Betty McDonald, Melanie McDonald, Ann McIntyre, Michael McKaig, Michelle Mendieta, Grace Middleton, Sally Muhlback, Danielle Musselman, Meredith Moore Myrick, Tracy Nichols, Robbin Parish, Beth Peterson, Susie Peterson, Deborah Rainer, Krista Richter, Karen Riley, Michaela & Hal Ritter, Martha Rogers, Paul Roosevelt, Sheila Shwiff, April Smith, Clare Stephens, Janice Stewart, Melissa Sweeney, Jennifer Swearingen, Kathy Swiney, Linda Thibodeau, Norah Thurman, Emily Tobey, Bobby Kay Turkett, Carol Venus, Jan Ward, Carolyn Wells, Margery Wessell, JoAnn Wiechmann, Carolyn Wilson, Mary Lovey Wood, Martha Wristen

Pledged Fellows – Persons who will give \$1,000 in a ten-year period

Katsura Aoyama, Suzanne Bonifert, Olivia Brown, Melissa Bruce, Gay Chalfant, Linda Curington, Cameron Curtis, Julia d'Avis, Pat Davis, Charlotte Delco, Deborah Ellis, Heather D. Fuller, Gina Glover, Mark Hanna, Candice Hicks, Ellen Kester, Margarita Limon-Ordonez, Rebecca Linke, Lauren Mathews, Melanie Medanich, Andrea Marsala Price, Norma Reyes, Lydia Richardson, Bess Sirmon Taylor, Danielle Sullivan-Constanzo, Katie Trujillo, Melinda Valentine-Powell, Christy Weddington, Kausar Zafar

TEXAS SPEECH LANGUAGE HEARING
 Fund Balance as of
 September 30, 2017

	<u>Unrestricted Fund Balance</u>
Operational Funds	125,401.36
Unrealized Gain/Loss - UBS	\$ <u>62,896.62</u>
Total Unrestricted Funds	<u>188,297.98</u>

	<u>Restricted Fund Balances</u>
<u>Scholarship Funds:</u>	
Ashby	\$ 21,828.68
Brand	24,375.36
Braniff-Terrell	42,964.08
Clipped B's - Braniff	20,454.00
Crabtree	21,589.77
Fox	20,494.00
Gateley	24,565.41
HACD	34,643.42
Hanke	28,696.41
Haynes	22,574.41
Keller	28,696.83
Mauzy, Anne	20,482.00
Middleton	25,860.95
Sancibrian	31,375.41
SASHLA	22,912.41
Stanley	21,984.41
Woolfolk	23,391.41
Sondra's Money	22,285.00
Zedler	20,690.00
Higdon	23,281.00
TCU COSD	9,405.01
Sub-Total	<u>512,549.97</u>

<u>Research Grants</u>	
Ashmore	34,871.00
Bangs	21,994.73
Friel-Patti	81,278.00
Presidents	30,562.30
Wiig	38,413.00
Sub-Total	<u>207,119.03</u>

<u>Educational Funds</u>	
Cole	13,992.00
Mauzy, Oscar	14,105.00
Noel Leadership Development	5,500.00
Sub-Total	<u>33,597.00</u>

Unaudited Financial Statement - For Board's Use Only

TEXAS SPEECH LANGUAGE HEARING
Fund Balance as of
September 30, 2017

<u>Bridge Funds</u>	
Lynch	30,794.91
Sub-Total	<u>30,794.91</u>
<u>Service Funds</u>	
Burtis-Vogel / Elkins	53,488.00
TSHA Young Leadership	22,690.07
Wright TX Education Loan Suppo	36,423.00
Sub-Total	<u>112,601.07</u>
Total Restricted Funds	<u>896,661.98</u>
Total Fund Balance	<u>\$ 1,084,959.96</u>

10/05/2017 2:45 pm RPT:1
Company: 00295

TEXAS SPEECH LANGUAGE HEARING
Statement of Financial Position
September 30, 2017

ASSETS

Current Assets:	
Prosperity Bk Premier Savings	34,394.81
Prosperity Bank Bus. Checking	14,459.40
UBS Financial Services:	
Money Market	45,213.33
Equities - Common Stock	
Equities - Mutual Funds	
Investment Co of America Fd (ICA	77,542.75
Fixed Income - CD's	
Fixed Income - Closed End Mutual Fds	
Eaton Vance Short Duration	72,279.51
Fixed Income - Mutual Fund	
Delaware Diversified Income Fund	120,547.30
Loomis Sayles Investment Grade	157,559.72
Fixed Income - Annuities	
Other Mutual Funds	
Income Fund of America Fd (AME	55,293.25
Blackrock Global Allocation Fund	65,574.64
First Eagle Global Fund	47,994.82
SPDR S&P 500	50,836.80
Metropolitan West Bond	148,356.34
Powershares ETF Intl Divid Achiev	35,207.00
iShares Core US Aggregate Bond	96,803.67
Investments @ Cost	973,209.13
FMV Adjustments	
Unrealized Gain/Loss	62,896.62
UBS Financial Services	1,036,105.75
Total Current Assets	1,084,959.96
Total Assets	<u>\$ 1,084,959.96</u>

Unaudited Financial Statement - For Board's Use Only

10/05/2017 2:45 pm RPT:1
Company: 00295

TEXAS SPEECH LANGUAGE HEARING
Statement of Financial Position
September 30, 2017

Liabilities & Net Assets

Liabilities:	
Total Liabilities	0.00
Net Assets:	
Current Year Earnings	67,133.74
Restricted Fund Balance - P/Y	815,324.72
Temp. Rest. Fund Balance - P/Y	49,381.31
Temp. Rest. Award Supplements	5,100.00
Unrestricted Fund Balance P/Y	148,020.19
Total Net Assets	<u>1,084,959.96</u>

Unaudited Financial Statement - For Board's Use Only

10/05/2017 2:46 pm RPT:10
Company: 00295

TEXAS SPEECH LANGUAGE HEARING
Statement of Activities
September 30, 2017

Description	Current Year		Prior Year	
	Year-to-Date	Pct	Year-to-Date	Pct
Income:				
Operational Income	3,001.49	2.4	1,550.00	1.3
Accrued Interest	0.00	0.0	(185.13)	(0.2)
Interest/Dividends/Capt Gains	15,656.18	12.6	15,672.62	12.8
Scholarship Funds Donations	4,930.01	4.0	17,564.00	14.4
Research Funds Donations	510.00	0.4	1,000.00	0.8
Educational Funds Donations	5,500.00	4.4	120.00	0.1
Bridge Funds Donations	0.00	0.0	30.00	0.0
Service Fund Donations	14,349.00	11.6	1,710.00	1.4
Fundraising Events:				
Annual Dinner/Luncheon	19,319.00	15.6	21,540.38	17.6
Auction & Silent Auction	0.00	0.0	3,262.20	2.7
Auction & Raffle	6,597.79	5.3	0.00	0.0
In-Kind Donations	333.15	0.3	7,961.20	6.5
Supplemental Award Donations	3,170.00	2.6	3,500.00	2.9
Unrealized Gain/Loss - UBS	50,563.27	40.8	48,464.37	39.7
Total Income	123,929.89	100.0	122,189.64	100.0
Expenses:				
Accounting & Review Expenses	9,430.00	7.6	9,150.00	7.5
Awards	28,300.00	22.8	29,900.00	24.5
Bank & Credit Card Charges	148.52	0.1	576.88	0.5
Insurance	1,372.00	1.1	1,294.00	1.1
Investment Management Fee -UBS	6,882.08	5.6	6,527.59	5.3
Office Supplies & Expense	22.54	0.0	23.28	0.0
Fundraising Events:				
Annual Dinner/Luncheon	5,547.86	4.5	10,140.14	8.3
Auction & Silent Auction	4,760.00	3.8	0.00	0.0
In-Kind Donations	333.15	0.3	7,961.20	6.5
Total Expense	56,796.15	45.8	65,573.09	53.7
Net Income (Loss)	\$ 67,133.74	54.2	\$ 56,616.55	46.3

Unaudited Financial Statement - For Board's Use Only