Inspiring Giving

With good planning and skillful guidance, the Community Foundation for Southern Arizona helps donors make a lasting difference.

**JULIAN BABAD.** In 1995, Julian started living part time in Tucson, and sought out the Foundation to be his eyes and ears into the needs of his new city. He set up a scholarship fund* and established a legacy gift that will support a variety of smaller community organizations, many of which he learned about when he served on the Foundation’s Community Investment Team. Julian also supports the Foundation’s year end campaign.

**SUSAN DODD.** Susan has designated her favorite organizations as beneficiaries on her retirement accounts and her house. She has addressed her broader interests by creating an unrestricted fund called the S. Dodd Watering Seeds Fund at the Foundation. It is a legacy gift, which will be funded by a transfer of stock upon her death. Introduced to the Foundation by a friend, Susan chose an unrestricted gift because of her trust in the Foundation to make good funding decisions now and forever.

**SPLENDIDO AT RANCHO VISTOSO.** Scholarships are one of many ways residents of this continuum-of-care community in Southern Arizona say thank you and give back to Splendido employees and their children. Residents established scholarship funds at the Foundation to make it easy to administer their program and to ensure its longevity.

Continued on Page 4

*Glossary of italicized giving terms on back page
Our New Trustees

JOSEPH BLAIR is the Executive Director of the Blair Charity Group. His 13-year global basketball career began at the University of Arizona. He was drafted by Seattle, pursued a career in Italy, was named Most Valuable Player of the Euro-league and also played for the Harlem Globetrotters. Serving as a Trustee aligns with his passion for supporting Southern Arizona.

FRED CHAFFEE was President and CEO of Arizona’s Children Association and is now a consultant and a teacher at Arizona State University’s Non-Profit Management Institute and at Georgetown University’s Institute for Juvenile Justice and Child Welfare. He brings expertise in strategic planning, operations, organizational development, and non-profit mergers and acquisitions to the Foundation board.

CANDE GROGAN has established a legacy of philanthropic leadership in Tucson through her generosity, volunteerism, and service. She was a Women’s Foundation of Southern Arizona Trustee for six years, including a stint as Chair, and a Trustee on the Dance Board for the University of Arizona College of Fine Arts for six years, with two years as Chair. Her experience will be an invaluable asset to the Board of Trustees.

NIKKI HALLE was the owner of a Windermere Real Estate franchise, was Director of Marketing for Rancho Vistoso, and has started and sold five companies. Now Vice President of the Bruce T. Halle Family Foundation, she works to bridge the gap between homelessness and self-sufficiency. Nikki brings to us that valuable combination of business savvy and foundation experience.

JAN LESHER is Deputy Pima County Administrator. She was Chief of Staff for former Arizona Governor Janet Napolitano and served as Chief of Staff for Operations at the Department of Homeland Security under Secretary Napolitano. Jan also served as Director of Arizona’s Department of Commerce. Her government and community relationships will be a huge help to the Foundation.

“Their students benefit from grappling with the complexity of a real world problem, as they apply and demonstrate their own talent, creativity, and exposure to business analytics to solve the problem,” says Program Director Diza Sauers.

A collaboration of the Community Foundation for Southern Arizona and United Way of Tucson and Southern Arizona, the Southern Arizona Indicators project aims to help shape the approach to community problem-solving. The project presents objective data and analysis on key community issues such as jobs, education and poverty in a way that is relevant, reliable and easy to understand.

The competition was underwritten by Paul L. Lindsey, a member of Eller’s National Board of Advisors and a Trustee with the Community Foundation for Southern Arizona.

For more information, go to southern.arizonaindicators.org
YEAR IN REVIEW

2011-2012

For 32 years, the Community Foundation for Southern Arizona has supported what you love where you live. Since 2010, grants from you, our donors, are up nearly 50 percent. We celebrate and are inspired by your generosity, and we are honored by your confidence in the Foundation’s ability to support your charitable interests and plant seeds of change. Your contributions to the Foundation are up 44 percent over last year.

On behalf of the Board of Trustees and the Community Foundation for Southern Arizona, we are pleased to provide you with this brief year in review.

Nancy M. Davis  
Chair, Board of Trustees

J. Clinton Mabie  
President and CEO

CENTER FOR PLANNED GIVING UPDATE

LORI HOBY has accepted the position of Associate Director of Gift Planning at Willamette University in Oregon, where she will be closer to her children and grandchildren. She leaves the Center for Planned Giving (CPG) at the Community Foundation for Southern Arizona in good hands with Interim Director Pauline Hechler.

Lori exchanged Oregon gray skies for Arizona sunshine in 2000, and went to work for the University of Arizona Foundation in 2001, where she discovered that planned giving is her professional passion. She joined CPG as Executive Director in 2006. Lori is a certified public accountant and tax professional and spent 25 years in public accounting before joining the philanthropic sector.

“Lori’s knowledge of planned giving and her CPG leadership have strengthened the charitable giving infrastructure and significantly increased charitable assets in Southern Arizona,” said Foundation President Clint Mabie. “Her expertise and warmth will be missed by many donors and all of us here at the Community Foundation.”

“I move back to Oregon with mixed emotions because I have worked with the most amazing and generous people and because the Foundation and the Center are such important organizations to the Southern Arizona community,” says Lori Hoby.
NOEL MATKIN/JIM SINCOX TRIBUTE ENDOWMENT.

A small group of friends honored two bulwarks of the LGBTQ community, Noel Matkin and Jim Sincox, by establishing this field of interest fund that, in turn, supports the LGBT-Straight Alliance Fund at the Foundation. These friends made their pledges, and then fanned out into the Alliance Fund’s community of supporters to ask for in-honor-of donations and planned gifts. The Foundation established the Alliance Fund in 1999 with a $100,000 challenge grant from the National Lesbian and Gay Community Funding Partners. In the ensuing years, the Alliance Fund has awarded more than half a million dollars in grants.

Read more about these generous donors and others at www.cfsaz.org.

COMMUNITY INVESTMENT TEAM volunteers oversee all unrestricted, field of interest, scholarship, and special fund grantmaking. They identify opportunities, issues and needs facing our region, and recommend funding priorities and community initiatives to our Board of Trustees.

FIELD OF INTEREST FUNDS address emerging needs and opportunities in particular areas of interest, such as the arts, the environment, and basic human needs. This type of fund allows you to support a charitable passion without year-to-year involvement in selecting specific charities.

LEGACY GIFTS are made through your estate plan. You determine your priorities and we ensure that they are honored and that your legacy benefits the community forever.

SCHOLARSHIP FUNDS provide a pathway to opportunity. You can define criteria or allow the Foundation latitude in the selection of deserving students.

UNRESTRICTED FUNDS provide flexibility to the Foundation in addressing a broad range of local needs, including issues that often cannot be anticipated at the time a gift is made. Foundation staff and the Community Investment Team provide skillful guidance each year to determine community needs and the best strategy to impact them.

Glossary

COMMUNITY INVESTMENT TEAM

FIELD OF INTEREST FUNDS

LEGACY GIFTS

SCHOLARSHIP FUNDS

UNRESTRICTED FUNDS

How Can We Support You in Making a Difference?

Giving feels good. And knowing that your charitable contributions are changing lives and improving your community feels even better. Working with the Community Foundation for Southern Arizona helps you make the most of your philanthropy. We offer:

- Personalized service & skillful guidance
- Thoughtful alignment with your financial goals
- Local expertise & insight about our region
- Creative approaches to community needs
- Community leadership
- Administrative support

Community Foundation for Southern Arizona

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We inspire and support donors making a difference NOW & FOREVER.