Begin by helping make a difference.

Thanks to all of you, we collectively made a difference in the lives of tens of thousands of people throughout our diverse community. We changed the culture of an entire community in Ajo, Arizona, began a vital conversation on our border region and helped pass groundbreaking legislation that will provide all foster children in our state with an opportunity to succeed in education and life. None of this would have been possible if not for the generous support of you, our donors. Thank you!

In November, we launched our 2016 Civic Leadership Campaign. Your donation to this campaign will help ensure that we can continue to lead and move the needle on important issues in our community. Please consider making an end-of-year tax-deductible donation to CFSA through our website www.cfsaz.org or call us at 520-770-0800 for more information.

A brighter future for our community starts with you.

Where do we begin?

1. What are you thankful for during the Season?
   I am thankful for my health and the health of my friends and wife, Martha.

2. What is your favorite place in Tucson?
   The Catalina’s with their never ending changes.

3. Describe CFSA in one sentence.
   A convener that connects donors to the causes they care about for the betterment of the community.

4. Share a personal fact no one would ever guess about you.
   I speak Vietnamese.

5. What is a recent book that you have enjoyed? Why?
   Walking the Himalayas by Levinson Wood. It brings back wonderful memories of my Peace Corps experiences.
As we head into the holidays, I want to express my gratitude and heartfelt thank you for allowing all of us to collectively make a difference in the lives of tens of thousands of people throughout our diverse community.

We have thrived in 2016 thanks to you, our donors, and the proof is in the countless success stories and accomplishments:

- Established more than 48 new funds (FY16)
- Received a record $7.2M donations to existing funds (FY16)
- Granted over $7.1M to the Southern Arizona community (FY16)
- Implemented a new Donor Portal that makes giving easy
- Created an entire food economy in Ajo, Arizona
- Convened an important binational conversation on the border
- Conducted one year of research to create a Center for Nonprofits in our community
- Celebrated new faces in our organization, both on our Board of Directors and among our employees, to better serve the community
- Assisted with community convenings to continue the development of the MAP Dashboard project
- Helped pass groundbreaking legislation to expand the FosterEd program to all foster children in our state and provide them with an opportunity to succeed in education and life.

None of this would have been possible if not for your generous support. Thank you for helping us to lead and move the needle on important issues in our community.

We look forward to continuing to engage and connect with our donors, affiliates, programs and initiatives as we strive for a successful 2017.

On behalf of our Board of Trustees and staff, we wish you and your families a happy and peaceful Holiday season.

Sincerely,

J. Clinton Mabie
President and CEO
Community Foundation for Southern Arizona

Clint’s Corner

“Kindness is a language which the deaf can hear and the blind can see.”
– Mark Twain

COMMUNITY FOUNDATION for SOUTHERN ARIZONA

Last Quarter by the Numbers

- Gifts: $2.1M*
- Grants: $2.5M*
- New Funds: 9*
- Endowment Pool: ↑ 3.8%**
- 5 Year Return: 8.8%**

* Unaudited as of FY17 Q1
** For detailed reports on all investment pools, please visit cfsaz.org/about/financials/

Are you ready to partner with CFSA by working together to collectively impact our community?

We are now inviting donors to partner with us in a new and innovative approach to supporting high-impact nonprofits within our region.

CFSA is allocating a portion of its unrestricted grantmaking dollars this year to “flex” grants, which will provide core operating support to a select number of nonprofit organizations. We will pool our funds with donor funds to allow nonprofits to prioritize their own needs and respond to unforeseen needs or opportunities. Funds may be used for a variety of purposes, including administrative costs, program expenses or salaries.

Additional information will be available at www.cfsaz.org in early 2017.
Open House Connected Funders with Nonprofits

The Fourth Annual Open House + Presentation on Nov. 1 provided attendees with a great afternoon of sharing knowledge and the opportunity to refresh their understanding of the fundamental role donors play in our organizations.

The event was highlighted by a presentation hosted by CFSA and Jewish Community Foundation of Southern Arizona (JCF) titled “Securing the Future + How to Talk to Your Donors about Investing in Your Organization’s Future,” by Kathryn Miree, who is a nationally renowned speaker and author on nonprofit gift planning and administration.

Followed by a two-hour Open House organized by Southern Arizona Grantmakers (SAG) that provided grantmakers and nonprofits the opportunity to connect, engage and develop relations that will evolve into long-lasting partnerships.

“The Open House has always been an excellent opportunity for nonprofits to come together and share their experiences and ideas,” said Clint Mabie, CFSA President and CEO. “By bringing the corporate and foundation funders into the event, we created the opportunity for everyone to be in one room to exchange ideas on how we can all work together for the worthy causes we care about and support.”

SOCIAL VENTURE PARTNERS FAST PITCH TUCSON

Congratulations to the seven outstanding non-profit leaders that competed for cash prizes as they presented their innovative three-minute “fast pitch” stories. CFSA was proud to be the DOUBLE your IMPACT sponsor for the SVP’s 2016 Fast Pitch program.

L-R: YWCA of Southern Arizona, Kerri Lopez-Howell; Esperanza Dance Project, Beth Braun; Girl Scouts of Southern Arizona, Paloma Lopez-Santiago; Children’s Clinics, Jared Perkins; Helping Hands for Single Moms, Lia Pierse; Interfaith Community Services, Tandala Kidd; and Community Home Repair Projects of Arizona, Carrie Nelson.
After a taxpayer has reached the age of seventy-and-a-half (70.5), the taxpayer can direct his/her IRA trustee to donate otherwise taxable traditional and Roth IRA amounts directly to a qualified public charity. These distributions are called qualified charitable distributions and may be excluded from the IRA owner’s gross income in any amount up to one hundred thousand dollars ($100,000) in a tax year.

A qualified public charity is generally a charity that is referred to as a 50% charity (i.e. a taxpayer’s deduction for cash contributions to these types of charities will be limited to 50% of the taxpayer’s Adjusted Gross Income “AGI”). However, a transfer to a private foundation or to a donor advised fund is not eligible as a qualified charitable distribution.

Any distribution that is excluded from gross income is not eligible for a charitable deduction. However, since the distribution is excluded from gross income, the handling equates to an immediate 100% above-the-line deduction. The taxpayer does not have to consider the general AGI limits of taking a charitable deduction, and the taxpayer’s AGI will be lower, which will be beneficial when considering AGI limitations for itemized deductions, such as those on medical, charitable and miscellaneous deductions. Another benefit is that the qualified charitable distribution counts as a distribution for purposes of the required minimum distribution (“RMD”) rules.

If you are interested in learning more about qualified charitable contributions, contact Mary Louise Luna, Director of Gift Planning at the Community Foundation for Southern Arizona at 520-209-2875 or mlluna@cfsaz.org.

Steven C. Wagner, JD, CPA is an Attorney/President at Fletcher Struse Fickbohm & Marvel, located in Tucson, Arizona. He is also a member of CFSA’s Professional Advisory Committee.