



ARIZONA GRANTMAKERS FORUM

to Increase, Enhance & Improve Philanthropy in Arizona

AGF MEMBERSHIP

AFC Public Foundation Arizona • Arizona Board of Regents • Arizona College Scholarship Foundation • Arizona Community Foundation • Arizona Foundation for Educational Advancement • Arizona Foundation for Legal Services & Education • Arizona Foundation for Women • Arizona Governor's Office for Children, Youth & Families • Arizona Humanities Council • Arizona Public Service • The Arizona Republic • BHHS Legacy Foundation • Bidstrup Foundation • Bill & Melinda Gates Foundation • Blue Cross Blue Shield of Arizona • Boeing Company • Bruce T. Halle Family Foundation • C.W. & Modene Neely Charitable Foundation • Carstens Family Funds • Casey Family Programs • Catholic Community Foundation • Central Arizona Project • CHW Foundation - East Valley • Chauncey Foundation • City of Flagstaff • City of Phoenix • Coconino County • Community Foundation for Southern Arizona • Corporation for National and Community Service • Cox Communications • Delta Dental of Arizona Foundation • Dorrance Family Foundation • Ellis Center for Educational Excellence • F2 Family Foundation • Fennemore Craig P.C. • First Things First • Flinn Foundation • Freeport-McMoRan Copper & Gold • Helios Education Foundation • Hickey Family Foundation • Honeywell Aerospace • The Hopi Foundation • Ibis Foundation of Arizona • John and Editha Kapoor Charitable Trust • Jewish Community Foundation of Greater Phoenix • JPMorgan Chase • Katybug Social Innovation Fund • Kellam Foundation • Kemper and Ethel Marley Foundation • LISC Phoenix • The Lodestar Foundation • Long Taylor Foundation • McMiles Foundation • Nina Mason Pulliam Charitable Trust • Northern Trust • Pastoral Care Donor Advised Fund • PetSmart Charities • Phoenix Coyotes Charities • Phoenix Suns Charities • Qwest • Raytheon • Rodel Charitable Foundation of Arizona • Rosenbluth Family Foundation • Salt River Project • Social Venture Partners AZ • Southwest Gas Corporation • St. Luke's Health Initiatives • Steele Foundation • Sun Health Foundation • Theresa's Fund • Thunderbird Junior Golf Foundation • Tucson Electric Power • Tucson Osteopathic Medical Foundation • United Way of Northern Arizona • Universal Technical Institute Foundation • US Airways • Valley of the Sun United Way • The Virginia G. Piper Charitable Trust • Wells Fargo • Whiteman Foundation •

BECAUSE WE'RE BETTER TOGETHER



Arizona Grantmakers Forum (AGF), founded in 1986, is the regional association of grantmakers serving Arizona. Our mission is to increase, enhance and improve philanthropy in Arizona. Members include public and private foundations, corporations, trusts and donor advised funds, government entities and individuals that make contributions to nonprofits in Arizona.

AGF provides members with resources for:

Networking...

*with other grantmakers
committed to improving quality
of life in our region*

Skill building...

*programs delivered locally to
help funders make the most of
their giving*

Knowledge...

*and information on
grantmaking in
our region*

Membership Benefits

Bi-Monthly Programs – timely, relevant educational and networking opportunities that enhance understanding of national and local issues and strengthen grantmaking skills; focus on best practices

Affinity Group Sessions – networking/collaboration opportunities for corporate grantmakers, small foundation staff, education funders, grantmakers in aging, rural funders, and emerging professionals to explore common interests with their peers

Member Listserv – easy, direct email communication with the entire AGF membership

Member Only Website Resources – member directory, program videos and podcasts, sample policies and procedures, articles and templates, and a searchable national knowledgebase

Members Only Social Media Portal – access to our new website www.AGFCommunity.org. This is a social media portal open only to AGF members. Share ideas, pictures, video, and more on this easy to use website.

Member Exchange E-Newsletter – a bi-monthly summary of current national and local news and relevant resources related to the philanthropic sector

Software and Subscription Discounts – a range of products including: *Stanford Social Innovation Review, Pearl software, A+ Conferencing, D&O Insurance, BoardSource Membership, GrantCraft Products & Services, Council on Foundations Grantmaking Basics Online, and The Foundation Review*

Personal Assistance – AGF staff is available to answer questions relating to the philanthropic sector and can direct members to timely and relevant resources.

Membership Dues

Annual membership dues range from \$500 to \$6,500 and are based on the annual philanthropic expenditures made by the contributing foundation or grantmaking institution. Members located outside Maricopa County also receive a 50% dues discount annually.

For more information, contact Marissa Theisen, President & CEO, at 602-977-2756 or mtheisen@azgrantmakers.org.



Website

www.azgrantmakers.org

Arizona Grantmakers Forum's extensive website provides a wealth of information and resources for grantmakers in our state. Visit the site to view links, publications, and other resources for funders of all kinds, as well as current news and events and details on AGF and membership in our organization. AGF members also enjoy a password-protected Members Only section of the site.

Resources

AGF's resource section includes links to publications and websites for individuals, foundations, corporations, professional advisors and more. We also have a section of resources just for nonprofit organizations, which has information to help nonprofits better understand the sector and the funding world.

Current Philanthropy News

Our Philanthropy News section is updated weekly, and offers a variety of press releases, current events, editorials, and more related to philanthropy in Arizona and throughout the world.

Calendar of Events

One of AGF's most significant member benefits is our monthly educational programs on topics relevant to your work as a funder. Our interactive *Calendar of Events* includes all of our monthly programs, as well as any other educational and/or networking opportunities available to funders in Arizona.

Member Only Section

Available only to AGF members through a password, the Members Only section includes a detailed directory of all AGF member organizations, special resources including videos and podcasts of AGF monthly programs, archives of the Member Exchange newsletter, access to AGF's ListServ and internal documents including Strategic Plans, Organization Budget, and minutes from all Board and Committee meetings. Members also have access to a national Knowledgebase of thousands of sample documents, publications, and articles related to philanthropy and charitable giving.





Our Members

2011 Members of the Arizona Grantmakers Forum

Public Foundations/Grantmakers

AFC Public Foundation
Arizona College Scholarship Foundation
Arizona Community Foundation
Arizona Foundation for Educational Advancement
Arizona Foundation for Legal Services & Education
Arizona Foundation for Women
Arizona Humanities Council
BHHS Legacy Foundation
Catholic Community Foundation
Community Foundation for Southern Arizona
Ellis Center for Educational Excellence
Helios Education Foundation
Hopi Foundation
Jewish Community Foundation of Greater Phoenix
LISC Phoenix
The Lodestar Foundation
Rodel Charitable Foundation of Arizona
St. Luke's Health Initiatives
Social Venture Partners AZ
Sun Health Foundation
Thunderbirds Junior Golf Foundation
United Way of Northern Arizona
Valley of the Sun United Way

Corporate

Arizona Public Service
The Arizona Republic
Blue Cross Blue Shield of Arizona
Boeing Company
Central Arizona Project
CHW Foundation – East Valley
Cox Communications
Delta Dental of AZ Foundation
Fennemore Craig, P.C.
Freeport-McMoRan Copper and Gold Inc.
Honeywell Aerospace
JPMorgan Chase
Northern Trust
PetSmart Charities
Phoenix Suns Charities
Phoenix Coyotes Charities
Qwest
Raytheon
Southwest Gas

Corporate (continued)

Salt River Project
Tucson Electric Power
US Airways
Universal Technical Institute Foundation
Wells Fargo

Private Foundations

Casey Family Programs
The Flinn Foundation
Nina Mason Pulliam Charitable Trust
Steele Foundation
Tucson Osteopathic Medical Foundation
Virginia G. Piper Charitable Trust

Government Agencies

Arizona Board of Regents
Arizona Governor's Office for Children, Youth & Families
City of Flagstaff
City of Phoenix
Coconino County
Corporation for Nat'l and Community Service
First Things First

Family Foundations

The Bidstrup Foundation
Bill & Melinda Gates Foundation
Bruce T. Halle Family Foundation
Carstens Family Fund
Chauncey Family Foundation
C.W. & Modene Neely Charitable Foundation
Dorrance Family Foundation
F2 Family Foundation
Hickey Family Foundation
Ibis Foundation of Arizona
John and Editha Kapoor Charitable Trust
Katybug Social Innovation Fund
Kellam Foundation
Kemper and Ethel Marley Foundation
Long Taylor Foundation
McMiles Foundation
Pastoral Care Donor Advised Fund
Rosenbluth Family Foundation
Theresa's Fund
Whiteman Foundation



Monthly Programs

2011 Program and Affinity Group Schedule*

January 12	Affinity Group – Small/Family Foundation Roundtable
January 27	Affinity Group – Grantmaking in Aging Roundtable
February 9	Affinity Group – Corporate Funders Roundtable
February 16	Affinity Group – Rural Funders Roundtable
February 24	Program – Arizona’s Budget Challenges and Implications for Nonprofits
March 4	Program – ASU Lodestar/AGF Joint Conference
March 9	Affinity Group – Education Funders Roundtable
April 11	Affinity Group – Grantmaking in Aging Roundtable
April 13	Affinity Group – Small/Family Foundation Roundtable
May 11	Affinity Group - Corporate Funders Roundtable
May 26	Grantmakers for Effective Organizations – Half Day Workshop
June 8	Affinity Group – Education Funders Roundtable
July 13	Affinity Group – Small/Family Foundation Roundtable
July 28	Program – Phoenix Funder Collaborative – Place Based Funding
August 10	Affinity Group – Corporate Funders Roundtable
September 14	Affinity Group – Education Funder Roundtable
September 22	Program – Autumn Social
October 12	Affinity Group – Small/Family Foundation Roundtable
November 9	Affinity Group – Corporate Funders Roundtable
December 7	Affinity Group – Education Funders Roundtable
December 15	Program – Annual Meeting

**Please note – this is an overview only and may change. It may not include all AGF programs throughout the year.*



What are Members Saying?



The Arizona Republic has a long tradition of playing a leadership role in the greater Phoenix community. The newspaper was established in 1890, even before Arizona became a state, and subsequently, plays an integral part in encouraging residents to contribute to the health and vitality of the community. The *Republic* considers it a goal to educate the public about needs within the community and to issue calls to action.

Gene

D'Adamo

Vice President
Community
Relations

The Arizona
Republic

Clearly, the *Republic* is a corporation that believes in leveraging partnerships to help improve the community. Through AGF, the community relations staff at the *Republic* is able to build connections with other funders. The monthly programs offer invaluable professional development opportunities to get new insights on social issues and trends.

"Many corporations are approaching grantmaking in a more strategic manner, refining our guidelines and becoming more focused," explains Gene D'Adamo, who is also on the Board of Directors for AGF. "For example, rather than funding myriad programs under Education, we now target our support to reading and literacy programs for Kindergarten through 3rd grade. AGF helps us think through all of this to figure out how we can make a more meaningful impact in the community."

Pat Miles is the President of the McMiles Foundation, a small family foundation established in 2004 whose main geographic focus is Arizona. With a board of five, the mission of the McMiles Foundation is to promote social justice by supporting programs that use education as a means to empower people with the skills and voice to affect positive change for themselves and the society as a whole, with special consideration given to women and youth. Pat's 20 years experience in secondary education, including nine years at Xavier, clearly influenced this McMiles mission.



Pat Miles

President

McMiles Foundation

The Foundation focuses its grantmaking in Arizona, with limited support to international organizations, and addresses the needs of vulnerable and underserved groups, with special consideration given to those empowering women and youth.



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2010 Supporters

Leadership Circle:

- Arizona Community Foundation
- BHHS Legacy Foundation
- Flinn Foundation
- Helios Education Foundation
- The Lodestar Foundation
- Nina Mason Pulliam Charitable Trust
- St. Luke's Health Initiatives
- Virginia G. Piper Charitable Trust

Partners Circle:

- JPMorgan Chase
- Chauncey Foundation
- Rodel Charitable Foundation of Arizona

Program Sponsors:

- Arizona Public Service
- The Arizona Republic
- F2 Family Foundation
- McMiles Foundation
- Salt River Project

Quick Facts

Founded:	1986
Incorporated in:	2001
Current Members:	80 Organizations*
Current Staff:	2 FT, 1 Vista
Annual Budget:	\$303,780
Website:	www.azgrantmakers.org

*As of December 27, 2010, AGF Membership is comprised of 30% corporations, 27% public grantmakers, 26% family foundations, 9% governmental entities, and 8% private foundations.

Board of Directors

2011 Officers

Gerald Wissink, Chair, *BHHS Legacy Foundation*

Barbara Ryan, Vice Chair, *Helios Education Foundation*

Mary Jane Rynd, Secretary/Treasurer, *Virginia G. Piper Charitable Trust*

Carol Peck, Ed.D., Immediate Past Chair – ex-officio, *Rodel Charitable Foundation of Arizona*

2011 Directors

Kerry Blume, *United Way of Northern Arizona*

Gene D'Adamo, *The Arizona Republic*

Karen Fisch, *Salt River Project*

Sharon Foltz, *Tucson Electric Power*

Belen Gonzalez, *Nina Mason Pulliam Charitable Trust*

Jack Jewett, *Flinn Foundation*

Lydia Lee, *JPMorgan Chase*

Clint Mabie, *Community Foundation for Southern Arizona*

Patricia Miles, *McMiles Foundation*

Barbara Poley, *The Hopi Foundation*

Steve Seleznow, *Arizona Community Foundation*

Merl Waschler, *Valley of the Sun United Way*

For More Information...

Annual membership dues range from \$500 to \$6,500 and are based on the annual philanthropic expenditures made by the contributing foundation or grantmaking institution.

For more information, contact Marissa Theisen, President & CEO, at 602-977-2756 or mtheisen@azgrantmakers.org.



Membership Application

MEMBERSHIP DUES FORM Year 2011

Date of Application

Name of Organization

Address

City State Zip

Phone Fax

Website (main site, or where grantmaking information can be found)

Type of grantmaker:

- Independent Foundation
- Community Foundation
- Corporate
- Family Foundation
- Other (please specify below):
 - Accounting Organization
 - Bank Trust
 - Bar Association Foundation
 - Chamber of Commerce
 - Donor Advised Fund
 - Federated Fund
 - Fraternity/Sorority
 - Government Agency
 - Individual

EIN: _____

- My organization files a 990
- My organization files a 990-PF
- N/A

- Operating Foundation
- Public Charity
- Professional Advisor
- Publicly Funded Organization
- Religious Organization
- School
- Service Club
- Supporting Organization
- Trade Association

Year founded: _____

Funding Interests:

- Aging
- Animals
- Arts, Culture, Humanities
- Education
- Environment
- Health
- Human Services
- International/Foreign Affairs
- Public/Society Benefit
- Religion
- Rural
- Science and Technology
- Other _____

Targeted Populations, if any:

- Early Childhood
- Youth
- Families
- Women
- Elderly
- Minority _____
- Other _____

Write a brief statement about your organization's principal mission and funding areas, including geographic limitations, if applicable:

Primary Contact:

Name

Title

Direct Phone

Email address**Billing Contact, if different**

Name

Title

Direct Phone

Email address

Please list other staff &/or trustees who should receive regular mailings & announcements from AGF:
(attach additional pages or separate list, if necessary)

Name

Title

Email address

Name

Title

Email address

Name

Title

Email address

Financial data – Please provide the following data for the most recently-completed fiscal year:

Fiscal year

Assets

Total Grants Awarded in AZ

MEMBERSHIP DUES: Membership dues are calculated based on total philanthropic expenditures made in Arizona during your last fiscal year.

Total Philanthropic Expenditures in AZ in Last Fiscal Year*	2010 Dues**
Less than \$50,000	\$500
\$50,000-\$100,000	\$625
\$100,001- \$250,000	\$875
\$250,001-\$1,000,000	\$1,250
\$1,000,001-\$5,000,000	\$2,500
Greater than \$5,000,000	\$6,500
Public Sector/Tribal Members	\$1,000

*Please note: To better represent the diverse nature of our grantmaking members, membership categories are now based on the **greater of philanthropic expenditures** (grants plus other direct program expenditures) **or 5% of total assets**. Call AGF with any questions regarding this change.

**Funders located outside of Maricopa County pay only ½ of the dues amount. Dues are based on the calendar year and may be pro-rated for members joining during the year.

MAKE CHECKS PAYABLE TO "ARIZONA GRANTMAKERS FORUM," AND SEND TO:

Arizona Grantmakers Forum
1505 E. Missouri Ave., Ste. 200
Phoenix, AZ 85014

If you have questions, call Marissa Theisen, 602-977-2756 or email mtheisen@azgrantmakers.org.