

AzCA Endowment Notes

Endowment Name	Donor info	Giving timeline	Restriction	Assoc./ Fdtn	Notes
Kids Clothing	Slivy Edmonds and Lorenzo Cotton provided at least \$25k, and remainder appears to be from a hundred other donors ranging from \$5 to \$500	Cotton's kick-off pledge dated 05/02/95. Donations continued through 01/97.	Kids Clothing	Association	Development staff working to meet with Slivy. Phone number on file is outdated. Trying connection through LinkedIn and local contacts. She was not on our Board but solicited by Barb Levy. Per Fred, it was for clothing for kids, wasn't an agency campaign but Slivy did recruitment herself.
McMillan	Kate McMillan from the Estate of Robert T. and Ruth McMillan	3 gifts made – 12/24/97 (\$247.5k), 12/21/98 (\$15k) and 01/21/99 (\$661)	"to provide vocational or other training to underprivileged children with the goal of preparing them for gainful employment"	Association	Restriction information was directly pulled from McMillan will (saved in documents).
Doris Ellis	Mental Health Resources Inc. (MHRI)/ Community Partnership of Southern Arizona (CPSA) in memory of Doris Ellis	First and only gift dated 03/09/01	Volunteerism/ Appreciation. Has been used for volunteer trophies expenses – the "Doris Ellis Award" – ("to recognize volunteers, was pretty general, could be used to underwrite appreciation events" – per Fred)	Association	Doris Ellis was former AzCA Board member. Per Fred, RHBA predated CPSA got to keep their leftover funds and were able to turn it into nonprofit. Gary Akerson ran it. Doris was on their board too.

Olmstead	Estate of Mallory Mixsell Olmsted	Two bequest gifts - dated 08/16/96 (\$83.2k) and 01/03/97 (\$34k)	“Operating Expenses” in an AzCA note, nothing specific stated on official document	Association	
Unknown			“There is also \$8,000 of unrestricted permanent endowment ‘sitting’ on the Agency’s balance sheet. Charlene said she doesn’t know how it originated; was on books when she took over.” – Email to Fred from Christina dated 10/2009.	Association	From Christina C: The unknown of \$8000 predates both Fred and Charlene.
Hapner (aka “Hapner Endowed Fund for Excellence in Early Childhood”)	Mary Lou Hapner with additional funds from Elma Benz, Dr. J. Schaefer, Helen Schaefer, Kim Hapner, Rector-Wyckoff (via CFSA), Bob Kittredge, and AzCA Phoenix Golf Tournament proceeds	Established in 1997	“enable the agency to hire an individual with expertise that will enhance services being offered to young children” 2 nd description (1998): “will fund staff education in areas of new expertise for the agency to enable them to better serve the children and families of Arizona”	Foundation	From Christina C: There was also some discussion as to the return on this endowment as Mary Lou believes she could achieve a higher return. I’m pretty sure she could but the Board of Directors were specific as to the investment strategy as one of preservation to avoid invading the corpus.
Jessica Greenbaum	Nancy Alexander, George Greenbaum, Richard Kepelman, and approx. 42 other donors	between 05/02/01 and 10/31/04	“use the interest from the Jessica Greenbaum Toy Fund Endowment to purchase toys and recreational items for the children.” Campaign letter for Greenbaum fund states “will provide an opportunity for each child and staff member to	Foundation	

			select a meaningful toy or gift that will belong to that child.” (2001)		
J Corrigan Rural Fund (aka “Joyce Corrigan Endowment for Family Preservation in Rural Arizona”)	Kemper and Ethel Marley Foundation in honor of Joyce Corrigan	Three gifts made on 2/2001 (\$200k), 2/2002 (\$150k) and 2/2003 (\$150k).	“will ensure the delivery of services to children and families in crisis throughout AZ, particularly in areas of limited resources... will also be used to support and enhance programs such as emergency shelter, therapeutic foster care and older child adoption, adolescent substance abuse, as well as child abuse prevention and parent education”	Foundation	Restriction copy is from AzCA’s proposal/request letter. Gift letter is not as specific, just states for the “Joyce Corrigan Endowment for Family Preservation in Rural Arizona.”
Morris	Margaret T. Morris Foundation	Two gifts: 12/27/00 (\$50k) and 12/27/01 (\$35k).	“for the statewide recruitment and training of foster parents”	Foundation	Letter from Eugene Polk (trustee) dated 12/19/2000.
Weese (aka “William C. Weese M.D. Staff Continuing Education Endowment Fund”)	Dr. William Weese and others (in small amounts \$25-\$1000)	Established in 2004	“to fund educational opportunities, classes, conferences” for staff	Foundation	Restriction info from AzCA staff communications. Weese is a former AzCA Board member.
Steele	Steele Foundation	Commitment made in 2000 to donate 3 gifts – 12/03 (\$100k), 12/04 (\$100k, 12/05 (\$50k)	For the purpose of supporting Kampaign for Kids initiative - “Among the elements in the Kampaign for Kids are: a general endowment, capital for a Phoenix treatment facility, improvement of residential treatment facilities, a Yuma treatment facility, and	Foundation	KFK campaign brochures and forms available in Archive/Endowments documents folder.

			upgraded facilities for The Parent Connection.”		
Angel	Patrick Hoog in honor of mother Frances Mary Clancy Hoog AND others (incl. Citizens Transfer, Carrie Hall, Kathleen Rector-Wyckoff)	Established in 1999	“an endowment to be used in perpetuity to provide help for children and families in crisis”	Foundation	From Christina C: The Angel Charity endowment is from when AzCA was a the recipient of their annual campaign with the funding to be used to renovate Angel House. Either the renovation came in less than budgeted or the appeal exceeded estimates. Update: Based on the paperwork that was found, Dayna does not agree with Christina’s recollection and does not believe that it had anything to do with Angel Charity. Appears to be an AzCA campaign effort – general documents state “Yes! I want to join the Angel Endowment Association” with an ask of \$10,000 per donor and each donor could name their own honoree.
Arizona’s Children Association Endowment	AzCA funds / Held at the Community Foundation of Southern Arizona		Per Fred, Barb Levy and Fred Chaffee decided to move some funds from AzCA to CFSA and ACF – a strategic/political move to build relationships with those companies. Per Fred, that money can be spent however we choose/ could even close fund if wanted to.	External (CFSA)	Confirmation from CFSA dated April 2002
Arizona’s Children	AzCA funds/		Per Fred, Barb Levy and Fred Chaffee decided to move some funds from	External (ACF)	

Association Endowment	Held at the Arizona Community Foundation		AzCA to CFSA and ACF – a strategic/political move to build relationships with those companies. Per Fred, that money can be spent however we choose/ could even close fund if wanted to.		
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