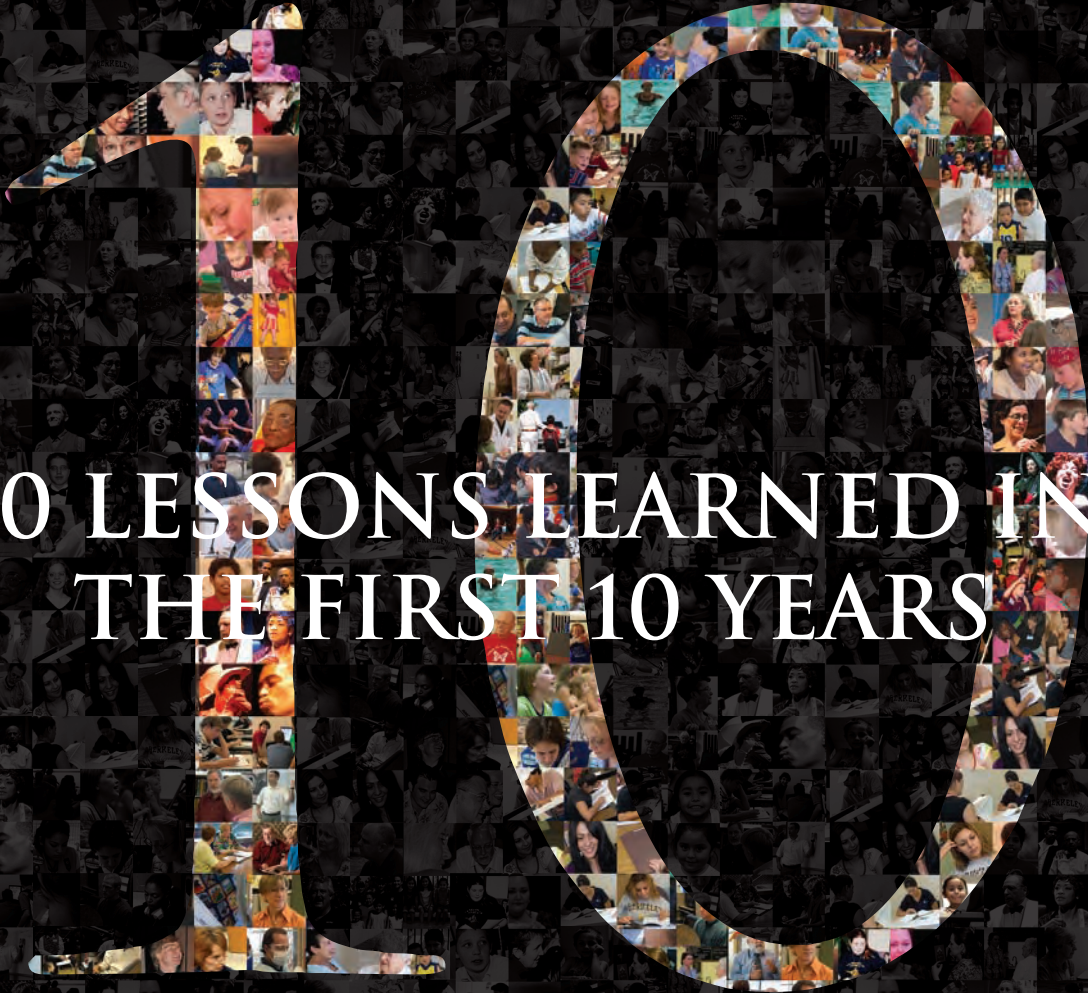


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VIRGINIA G. PIPER CHARITABLE TRUST

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ANNUAL REPORT 2009



10 LESSONS LEARNED IN
THE FIRST 10 YEARS

+notebook

November 2009

Piper Notebook is a magazine published three times each year by Virginia G. Piper Charitable Trust to inform the community about the work of the Trust and its grantees in Maricopa County, Arizona. This issue highlights the Trust's 10th anniversary and lessons learned in those first 10 years. The annual report covers March 31, 2008, to April 1, 2009.

Jane E. Ferguson, Editor
Eddie Shea, Designer
Bruce Peterson, Photographer



Childsplay, Arizona's professional theater for children and families, has been a strong nonprofit partner over Piper Trust's first decade. Here Charlotte of *Charlotte's Web* chats with Wilbur the pig in a earlier presentation of the children's classic. Childsplay is currently re-visioning the theater as the company uses strategic planning to prepare for the future.

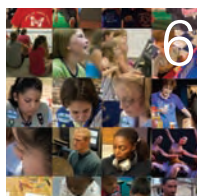
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OF NOTE: NEVER WASTE A GOOD CRISIS By Judy Jolley Mohraz, Ph.D., President and CEO



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10 Lessons Learned in the First 10 Years

1. A potential nightmare might just be effective governance
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TO THE COMMUNITY WE SERVE:

BOARD OF TRUSTEES' LETTER

Ten years ago we set out to give structure and life to Virginia Galvin Piper's dreams for her community. She entrusted the trustees to take her bequest and build a foundation that would extend her life's work. A decade later, we look back on these years, hoping our work reflects stewardship, integrity and fidelity to Virginia Piper's values.

As we review the lessons learned identified in the annual report, we can't help but recall how much learning has actually taken place among trustees and staff. As one trustee recalls, "*When we began, we didn't even have a pencil sharpener.*"

Recognizing there was only one opportunity to launch the Virginia G. Piper Charitable Trust, we sought expert advice from trustees and staff of local foundations, seasoned consultants, leaders in American philanthropy and financial advisors. We knew national perspectives had to be balanced with an understanding of local needs, so we talked with over one hundred nonprofit leaders to understand the gaps in support in the Valley. The learning has never stopped, and monthly we seek out experts in our grantmaking fields as well as community leaders and investment strategists to deepen our knowledge.

As we have worked to make wise decisions, we have held paramount our pledge to remain true to donor intent, a basic commandment for all trustees. Virginia identified six areas of grantmaking to which we have focused our attention and the Trust's resources. These include healthcare and medical research, children, education, older adults, arts and culture, and religious organizations. Our goal has been to carry forward her interests and expand further the impact of her gift to the community.

Originally our question was, "*What would Virginia do?*" as we reviewed grant proposals. As the Trust has developed major initiatives in

fields Virginia wouldn't have imagined such as personalized medicine, we reframed the question to ask, "*Would Virginia be proud of this grant?*"

Inevitably, not every grant, despite best efforts, succeeds. We accept this reality because we know if we don't take risks in the Trust's grantmaking, we can't expect to achieve high-impact results. Our risk tolerance has grown over the decade, and we hope the grants included in the annual report reflect our commitment to invest in solid projects with almost guaranteed success and also projects creating new models and new thinking that haven't become conventional wisdom. Both creating knowledge and acting on best practices are watchwords for strategic organizations.

Through it all, we remember Virginia's respect for each nonprofit leader who met with her in her living room. She would listen intently, ask probing questions, and never forget that she was a steward, not a permanent owner of her fortune. We never forget that it's not our money, another cardinal tenet for all trustees and staff.

We cannot anticipate what the coming years hold, but we know that we will develop new partnerships, explore ideas not yet envisioned and continue to measure every decision by the ageless values Virginia embraced.

Reflecting on the past 10 years, we would like to acknowledge and thank our dedicated staff as well as the hundreds of outstanding grantees with whom we have been privileged to partner. We know that Virginia would be extraordinarily proud of all of you, as are we. *

James D. Bruner	Laura R. Grafman
José A. Cárdenas	Sharon C. Harper
Paul N. Critchfield	Stephen J. Zabilski
Arthur W. DeCabooter	



Piper Trust moved into new offices in Central Phoenix—virtually the center of Maricopa County—during the fiscal year 2008-2009.

OF NOTE: NEVER WASTE A GOOD CRISIS

Judy Jolley Mohraz, Ph.D.
President and CEO



Virginia G. Piper Charitable Trust celebrated major milestones this year: The Trust turned 10, and the Trust's grantmaking passed the \$250 million mark. This annual report offers reflections on what we have learned over the decade and what our

investments in the community have taught us. We are proud of our record and the achievements of our nonprofit partners.

No annual report for 2008-2009 can focus exclusively on celebrations and grants. The bottom fell out of the economy. The Trust's endowment, like virtually every other foundation's assets, plummeted. And nonprofits absorbed one blow after another. Decreased public funding, diminished donor support and exploding demand among human service organizations created crises unmatched in the experience of our young community. Arizona's economy went into free fall as residents lost their jobs, their homes and their savings.

We have all had to make hard choices about priorities and policies. Yet life has a way of

intertwining the light with the dark. Piper Trustees made the decision to stay the course on the grants budget while cutting operating costs. We increased the number of Piper Academies and added funding opportunities for organizations to implement what they learned from the national experts. In the local philanthropic world, funders banded together in an unprecedented collaboration to provide support for front-line human services. Nonprofits streamlined their work and carried on with courage, grace and creativity.

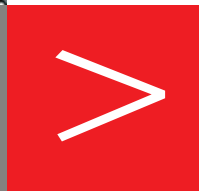
The past year produced the new admonition, "Never waste a good crisis." Trustees and staff at Piper are committed to playing our part in community and statewide efforts to forge new ways of problem solving and new paths to economic stability—goals that Arizonans have said they want. We cannot allow this crisis simply to diminish momentum and leave a legacy of suffering.

The lessons we have learned will guide us. The programs that strengthen nonprofits and make them more resilient will go forward and even expand. We enter our next decade with valuable experience and undiminished determination to transcend challenges hand in hand with our community partners and leaders.

This crisis will not be wasted, and we will all learn from it. *



10 LESSONS LEARNED IN THE FIRST 10 YEARS



Ten years fly by. The fledgling Virginia G. Piper Charitable Trust took off just before the start of this decade. Now, 10 years later, trustees and staff have taken time to reflect on what's been learned. Read the following special section. You'll see that it's been an interesting flight.

A POTENTIAL NIGHTMARE MIGHT JUST BE EFFECTIVE GOVERNANCE

JUST BECAUSE MOST NONPROFIT AND FOUNDATION BOARDS FOLLOW CERTAIN MODELS DOESN'T MEAN THAT AN ATYPICAL STRUCTURE MIGHT NOT PROVIDE THE IMPETUS FOR MORE ACTIVE ENGAGEMENT IN THE GOVERNING LEADERSHIP OF AN ORGANIZATION.

PIPER BOARD OF TRUSTEES

The founding board of trustees created a unique structure and mode of operation: The trustees met monthly both in formal meetings and informally; there is no chair of the board—all trustees share leadership, responsibility and authority by employing a rotating chair month to month who directs the discussion and board business.

A nightmare? Not for Piper Trust. Frequency of meetings has brought flexibility and immediacy in grantmaking. Trustees can work through an issue over a couple of months rather than over several quarters, typical for other foundations. And the rotating chair structure ensures that all board members are engaged because there is no inner and outer group.

This unique structure requires disciplined effort by the CEO to keep all board members informed or queried on major issues between meetings. It is also critical for board meetings to incorporate “red-meat”, that is substantive discussion and decisions, not merely pro forma ratification of staff-driven agenda items. Such meaningful discussion and group learning enrich and refine initiatives and programs.



James Bruner
Lifetime Trustee, 1999 -



Paul Critchfield
Lifetime Trustee, 1999 -



Laura Grafman
Lifetime Trustee, 1999 -



Robert Williams
Lifetime Trustee, 1999 - 2000



Arthur DeCabooter
Lifetime Trustee, 2000 -



Sharon Harper
Trustee, 2004 -



José Cárdenas
Trustee, 2005 -



Stephen Zabalski
Trustee, 2005 -

IF ONE EXPECTS ACCOUNTABILITY, BEGIN AT HOME

THE VALUES OF AN ORGANIZATION ARE EITHER LIVED OR NOT. IF A FOUNDATION WANTS GRANTEES TO ACHIEVE ITS VALUES OF EXCELLENCE, HONEST COMMUNICATION, COMMITMENT TO IMPROVEMENT AND LEARNING, STEWARDSHIP AND COMMUNITY COLLABORATION, THEN THE FUNDER MUST EMBRACE AND LIVE OUT THESE QUALITIES AS WELL.

A CULTURE OF TRUST

As a place-based foundation, Piper Trust has worked to build long-term, sustaining relationships. The ethos of the organization evolved from a desire to learn from the outset. Community Conversations—before the launch of grantmaking guidelines and strategy—laid a basis for transparency and established a culture of responsiveness to community nonprofits.

This approach has been intentional. With no confining history of embedded rules, the Trust embarked on its work with the opportunity to choose how it would operate. There was freedom to establish a nontraditional foundation culture.

Breakthrough ideas can come from individuals throughout an organization. But they can only come when there is a space created and a culture of trust developed that encourages everyone to be fully engaged.

Framing the work of each staff member in terms of responsibilities as opposed to a pure job description has helped foster the proactive stance of “leading from every chair”—a challenging environment most appropriate for individuals who are self-starters, accustomed to vigorous debate and at ease with ambiguity.



Piper Trust program directors Carol Kratz, right, and Marilee Dal Pra have been on the Piper program staff from the very first grantmaking cycle. They focus on building long-term relationships as the basis for grantmaking impact. Here the two hold a grantee orientation session, lovingly called Piper 201, for the nonprofits' executive leaders and board chairs.

INVEST IN A LEADER AND WATCH AN ORGANIZATION SOAR

SABBATICALS PLAY AN ACKNOWLEDGED ROLE IN THE PROFESSIONAL DEVELOPMENT OF ACADEMICS. WHAT IF NONPROFIT LEADERS HAD THE SAME OPPORTUNITIES FOR STUDY AND TRAVEL TO RETOOL, REFRESH AND RENEWS THEIR SKILLS?

PIPER FELLOWS SABBATICAL PROGRAM

When Piper Trust was setting up shop early in this decade, trustees and staff met with many local nonprofit leaders and came away with a keen sense of exhaustion among these executives. Some seemed close to burnout, others were yearning for chances to gain new skills, and many voiced a sense of isolation.

In fall 2001, the Trust launched the Piper Fellows program to offer seasoned leaders a chance to take one to two months of work-release time to explore educational and professional programs.

But the benefits of the program didn't stop with travel and study. The first fellows met monthly to share experiences and ideas, and when the second class was selected, the original fellows simply brought them into the circle of support. Today, there are monthly fellow meetings and learning circles to share both personal and professional issues common to the leaders.

Besides the fellowship, Piper Trust has added staff development funds for those left behind when the leader is on sabbatical, plus eligibility for a Piper Organizational Enhancement Award to support a significant project suggested by the fellowship—a potential total commitment of \$90,000 for each fellow organization.

Daniel Scoggin, the grown-up in a sea of Teleos Academy students, used his 2008 Piper Fellowship to learn about top-performing urban schools to help launch the new South Phoenix school for first-generation college bound students. Great Hearts Academies, the charter school management company behind Teleos, also received the first \$50,000 Piper Fellow Organizational Enhancement Award to implement Scoggin's learnings.



Jon Willey, photographer

TO REACH A CHALLENGING DESTINATION, EXPECT DETOURS AND REROUTING

ON THE WAY TO A PARTICULARLY DIFFICULT GOAL, STRATEGIES OR THE MIX OF STRATEGIES MAY NEED TO SHIFT AS THE FULL COMPLEXITY OF A PROBLEM REVEALS ITSELF. THESE TOUGH CHALLENGES USUALLY TAKE PERSEVERANCE AND CONSTANCY TO STAY ON TRACK.

PERSONALIZED MEDICINE INITIATIVE

How can philanthropic investments help make Arizona, already a biosciences incubator, become an acknowledged center for personalized medicine, an important new field of bioscience?

The answer for Piper Trust was a major investment in intellectual capital to build on the medical research of local institutes, medical centers and universities and attract high profile researchers who would serve as a magnet for others. In January 2006, the Trust announced a \$50 million commitment to attract 10 of the world's most distinguished leaders in science and medicine to help advance personalized medicine.

When that strategy hadn't recruited academic chairs after 18 months, Piper turned to Nobel laureate Dr. Leland Hartwell of Fred Hutchinson Cancer Research Center, Seattle. He designed the Partnership for Personalized Medicine, a collaboration involving the Biodesign Institute of Arizona State University, the Translational Genomics Research Institute (TGen) in Phoenix and Fred Hutchinson Center.

The partnership has now signed international partners, brought health economics and health policy to the center of the effort and, most recently, recruited proteomics researcher Dr. Josh LaBaer and his team from Harvard to ASU, as well as Dr. Hartwell and colleague Dr. Michael Birt. The initiative has gained momentum and serves as a recruitment magnet for all partner institutions.



Dr. Michael Birt, pictured above, has joined the new Center for Sustainable Health at the Biodesign Institute at Arizona State University. The new center will be led by his colleague Nobel laureate Dr. Leland Hartwell and is the latest development in the Partnership for Personalized Medicine, an effort to make Arizona a hub for personalized diagnostics.

INVESTMENTS IN EVALUATION SAVE FAR MORE THAN THEY COST

A FOUNDATION EVALUATION REVEALS THAT AN INTERVENTION DOES NOT WORK. IS THIS A FAILURE, OR IS IT A WELCOME EARLY WARNING THAT ADDITIONAL INVESTMENT IN A LARGE COMMUNITY INITIATIVE IS NOT APPROPRIATE?

HARVARD/TUFTS READING RESEARCH

It looked like a potential home run. Why not use organized afterschool time to enhance reading skills in non-literate elementary school children? Piper Trust hoped to roll out a substantial afterschool initiative in the Greater Phoenix area, but staff knew a rigorous study was necessary to determine whether selected national reading interventions in out-of-school settings were effective.

The Trust had found two models, one from Tufts University for addressing reading problems and a second from the Harvard Graduate School of Education to mediate behavioral problems, a potential contributor to illiteracy.

The U.S. Department of Education Institute of Education Sciences provided a \$1 million grant, requiring congressional approval, to cover research and test the pilot projects in two Boston afterschool programs.

A Piper grant of nearly \$700,000 expanded the research to two Maricopa County elementary schools.

The university researchers initially reported success, yet Piper's in-house analyses allowed for rigorous questioning of results leading to quite different conclusions. In fact, the results of the out-of-school reading remediation and social-emotional component were disappointing and did not warrant a major community investment.



Pilot projects in Maricopa County and Boston tested the efficacy of New Three Rs (Reading, Resilience and Relationships) to improve literacy among nonreaders in afterschool settings. Piper Trust funded the local research to see if the new projects were ones to invest in throughout Maricopa County, but data from both pilot sites indicated additional investments were not warranted.

“THINK NATIONALLY, ACT LOCALLY” IS NOT JUST POLITICAL STRATEGY

BORROWING IDEAS AND TOOLS FROM THE GREATER WORLD AND APPLYING THEM AT THE GRASS-ROOTS LEVEL IS A TRIED-AND-TRUE STRATEGY. WHY NOT REPLICATE BEST PRACTICES AND STELLAR PROGRAMS FROM AROUND THE COUNTRY TO BOOST IMPACT LOCALLY?

NATIONAL MODELS STRIKE PAYDIRT

In the older adults grantmaking area alone, Piper Trust has built on models from Mather Lifeways (the older-adult café folks), Civic Ventures (the civic engagement think tank behind Experience Corps and Experience Matters) and the National Council on Aging (the network of organizations serving older adults).

Several NCOA program models have been very successful:

- BenefitsCheckup.com, an online program to identify benefits for older adults, which the state of Arizona adopted after initial funding by partnering foundations.
- An NCOA fall prevention template grew into another public-private community project in Maricopa County.
- RespectAbility, a project that became “Maricopa Models of Significant Service” to help nonprofit organizations target boomers as a pool of highly skilled workers and volunteers.

Ten RespectAbility demonstration projects just wrapped up their two-year grant terms in October. The organizations reported phenomenal success in bringing older adult volunteers onboard to take them in new directions. An NCOA evaluation has shown that the Trust’s \$626,000 investment has shown a 756 percent (that’s not a typo) return on investment. That’s a lot of infused skills and wisdom in a short amount of time.



Boomer volunteers have had an enormous impact on three Mesa arts and culture organizations—Arizona Museum for Youth, Arizona Museum of Natural History and Mesa Arts Center. Volunteer Giles Mead, left, is a roaming and very friendly museum guide, and volunteer Karen Sherman implemented visitor surveys resulting in new wall and floor signage throughout the Natural History Museum.

WHEN ALLOCATING MONEY AMONG ORGANIZATIONS, ENSURE TRANSPARENCY

AN INITIATIVE WITH MANY POTENTIAL BENEFICIARIES NEEDS THE WISDOM OF SOLOMON TO DECIDE WHAT TO FUND. INDEPENDENT CONSULTANTS AND LEADERS TRUSTED BY ALL CONSTITUENTS CAN INSTILL IMPARTIALITY AND CONFIDENCE.

STRENGTHENING CATHOLIC EDUCATION

Reflecting Virginia Piper's deep commitment to her Catholic faith, Piper Trust invests in programs offered by faith-based organizations that focus on children and older adults. A major initiative, "Strengthening Catholic Education," has committed more than \$32.5 million to Catholic education.

Requests could have come parish by parish, but the Trust wanted to make a longer-term strategic commitment to parochial education. Outside consultants and the Diocese of Phoenix superintendent of schools became essential partners.

Piper Trust awarded \$20 million in grants from 2000-2004 to the six Phoenix-area Catholic preparatory schools, including one new high school, to enhance facilities, strengthen academic programs and ensure that more young people have the opportunity to attend Catholic schools.

In 2005, the Trust awarded nearly \$900,000 to support capital expansions and critical building improvements and to assess early childhood curricular needs at all 24 Valley Catholic preschools to improve the quality of every program.

A Piper-sponsored structural and mechanical analysis of the 25 Catholic elementary schools resulted in an \$8 million commitment to fund repairs and renovations critical to student health and safety in 2008. The study is a blueprint for prioritizing projects not only for the grant but also longer-term improvements.



A new playground at Trinity Catholic School was one of many safety projects at the 25 elementary schools. A structural and mechanical analysis of the elementary schools provided a capital improvement blueprint for prioritizing immediate needs and setting future priorities. The involvement of the Diocesan superintendent's office ensured an equitable distribution of funds.

Most Holy
in Phoenix
health and
Valley Catholic



BE PREPARED FOR GREAT IDEAS TO COME FROM UNEXPECTED MOMENTS

GOOD IDEAS HAVE NO BOUNDS. SOME OF THE BEST ARE SHOWER OR COMMUTING MOMENTS WHEN THE MIND ISN'T FULLY TUNED IN TO THE WORK OF THE DAY.

IN PHILANTHROPY, GREAT IDEAS CAN FLOW FROM A LONG DELIBERATIVE PROCESS OR ARE OFTEN SPARKED FROM CHANCE MEETINGS.

HOSPICE OF THE VALLEY

A Piper program director and the medical education director of the country's largest hospice had a conversation in a hallway at a reception. They were talking about a new Piper-funded program to teach medical residents about early childhood development as a supplement to pediatric medicine.

The conversation soon led to . . . *What if doctors knew more about the art as well as the science of caring for dying patients?*

The problem is that end-of-life care is different from typical medicine. The management of pain and symptoms like disorientation and anxiety, and the necessary social, psychological, cultural, emotional and spiritual supports—all require special palliative skills not routinely covered in medical education.

Hospice of the Valley, with Piper's support, started an innovative program in 2006 to train all family practice and internal medicine residents at the seven Maricopa County teaching hospitals in end-of-life care. The experiential training program was so well-received that it has been expanded to nurses, as well as social workers, chaplains and hospitalists. The curriculum is available at hov.org.



Dr. Gill Hamilton, center, medical education director of Hospice of the Valley, came up with the idea to train medical residents in palliative and end-of-life-care. Here she is greeting a patient as a doctor in the training rotation looks on. The curriculum has been extended to nurses, social workers, chaplains and hospital doctors.

WHAT FOUNDATIONS WANT TO KNOW MAY NOT BE WHAT NONPROFITS NEED TO KNOW

NONPROFITS OFTEN MAKE DECISIONS BY INTUITION OR STORIES FROM THE FIELD. AND FOUNDATIONS DON'T HELP IMPROVE DECISION-MAKING BY INSISTING ON REPORTING REQUIREMENTS THAT ARE INTERESTING TO THEM BUT MAY NOT COINCIDE WITH THE ORGANIZATION'S REQUIREMENTS FOR SUCCESS.

EVALUATIVE LEARNING PROGRAM

Piper Trust embarked on an initiative in 2006 to help nonprofits gain the tools and knowledge they need to use data more effectively to improve programs. The Trust believed that if organizations had access to timely, pertinent data for decision-making these organizations would be better able to fulfill their missions.

Piper started a pilot Evaluative Learning Initiative in partnership with the Valley of the Sun United Way and eight afterschool programs in Maricopa County.

Each afterschool program received KidTrax technology from NFocus to easily capture, track and report real-time data such as which children are in the facility at any one time, the activities the children are engaged in and, episodically, what they think about the programs.

The nonprofits then came together to define success for afterschool programs. Even though the providers viewed themselves as unique one from another, together they found that they agreed on several important ways to measure how they were doing. The criteria actually differs from what the Trust might have set but they clearly meet the organizations' needs.

All eight afterschool programs receive periodic information on what they achieve at the shared average and where they outperform or underperform their colleague organizations. Now, a consultant is working with the providers to share findings and learn from each other.



An access card signs a child instantly into the afterschool program at Improving Chandler Area Neighborhoods (ICAN). The technology provides real-time information about what activities a child participates in and periodically what she thinks about the programming. ICAN is one of eight afterschool programs working collaboratively to create evaluative measures and shared learning.

FOUNDATIONS HAVE MORE TO OFFER THAN GRANTS

STRATEGIC PHILANTHROPY IS NOT MERELY MEASURED IN DOLLARS INVESTED. STRATEGY COMES IN RIGOROUS GRANTMAKING WITH DEFINED MEASURES OF SUCCESS THAT HOLD THE POTENTIAL FOR LONG-TERM COMMUNITY IMPACT. STRATEGIC ALSO MEANS USING THE MANY OTHER TOOLS AVAILABLE TO FOCUS ON IMPACT AND POSITIVE CHANGE.

MORE THAN A GRANTMAKER

Building capacity in nonprofit leaders and their organizations can lead to excellence. From the beginning, Piper Trust has invested in helping nonprofits through education and expertise move to new levels of effectiveness and stability.

- The Piper Fellows program has renewed leaders and promoted new ideas.
- Staff members provide consultation in grant and program development, research and evaluation, communications and marketing, and financial management.
- The Trust brings experts in a variety of fields to present thought-provoking presentations to grantees. These Piper Academies now often have follow-on technical assistance that drill down to meet specific nonprofit challenges.
- In order to qualify for a Piper grant, the Trust requires potential grantees to enact several best practice recommendations developed by the Panel on the Nonprofit Sector in 2005, as well as provide information on board attendance rates and percentage of board members making contributions. Grantees report that these requirements have improved their effectiveness.
- Piper Trust convenes groups to address nonprofit and community issues and foster collaboration among foundations.
- The Trust evaluates its own effectiveness in working with grantees through grantee perception surveys conducted every few years by the Center for Effective Philanthropy. The results are posted on the Piper website.



Research and evaluation director Wayne Parker, left, and Mike Hughes, executive director of A New Leaf, have consulted for a number of years on evaluation projects. Most organizations want to be measured only when everything is going well, but Hughes wisely came to Piper for evaluation assistance when he really needed to find out what was wrong.

GRANTMAKING OVERVIEW

Fiscal Year 2009 – April 1, 2008, through March 31, 2009



Ballet Arizona

Arizona Science Center

Arizona Opera

Arts and Culture

Award Date	Amount	Paid FY 09
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Actors Theatre of Phoenix www.actorstheatrephx.org To create a permanent cash operating reserve.		
Feb. 1, 2009	\$100,000	\$50,000

Alliance for Audience www.allianceforaudience.org To provide operating support for ShowUp.com to increase marketing capacity for arts organizations.		
Sept. 10, 2007	\$258,700	\$86,500

Arizona Humanities Council www.azhumanities.org To support technology upgrades including hardware, software and website development.		
Sept. 8, 2008	\$20,000	\$20,000

Arizona Museum for Youth Friends, Inc. www.arizonamuseumforyouth.com To support strategic and fundraising plans to enhance the museum's financial stability.		
Feb. 12, 2007	\$85,000	\$36,000

Arizona Opera www.azopera.org To increase the permanent cash operating reserve.		
Feb. 9, 2009	\$250,000	\$125,000

Arizona Science Center www.azscience.org To support a capital campaign for revitalizing hands-on exhibits, programs and facilities, and for expanding the endowment and working capital.		
May 12, 2008	\$1,000,000	\$250,000

Ballet Arizona www.balletaz.org To support a challenge grant to increase the permanent cash operating reserve.		
Jan. 12, 2009	\$200,000	\$100,000

Chandler Cultural Foundation www.chandlercenter.org To upgrade the Chandler Center for the Arts ticket delivery system and expand patron services.		
Feb. 12, 2007	\$286,000	\$120,309

Childsplay, Inc. www.childsplayaz.org To support the the capital campaign to build the Campus for Imagination and Wonder and consolidate Childsplay's operations.		
Feb. 13, 2006	\$500,000	\$200,000

Childsplay, Inc. www.childsplayaz.org To support development of a strategic plan.		
Dec. 8, 2008	\$19,850	\$19,850

Desert Botanical Garden www.dbg.org To support a capital campaign to enhance education and exhibits, and build the endowment.		
Sept. 10, 2007	\$800,000	\$250,000

Mesa Arts Center Foundation www.mesaartscenter.com To support upgrading Mesa Arts Center's website.		
Dec. 16, 2008	\$20,000	\$20,000

Metro Phoenix Partnership for Arts and Culture www.mpacarts.org An expenditure responsibility grant to support efforts to strengthen arts and cultural organizations regionally.		
Dec. 6, 2004	\$3,000,000	\$794,434

Metro Phoenix Partnership for Arts and Culture www.mpacarts.org To develop partnerships that advance arts and culture in the region.		
Mar. 10, 2008	\$2,000,000	\$1,000,000

National Arts Strategies www.artstrategies.org To fund a two-year organizational development program offering seminars to arts and culture leaders, board members and key staff throughout Maricopa County.		
Jun. 13, 2005	\$135,000	\$35,000

Phoenix Art Museum www.phxart.org To launch and sustain a Valleywide Culture Pass program designed to develop new audiences by distributing free passes to a number of arts institutions at public libraries.		
Jan. 12, 2009	\$150,000	\$90,000

Phoenix Conservatory of Music www.PCMrocks.org To support organizational brand positioning and implementation of a donor development plan.		
May 12, 2008	\$55,000	\$20,000

Phoenix Symphony www.phoenixsymphony.org To create a cash operating reserve.		
Jun. 11, 2007	\$400,000	\$400,000

Red Rocks Music Festival www.redrocksmusicfestival.com To develop and implement a marketing campaign for musical events in Maricopa County.		
Jul. 14, 2008	\$5,000	\$5,000

Scottsdale Community Players www.stagebrush.org To expand children's programming and develop a marketing plan to increase program participation.		
Jun. 12, 2006	\$129,320	\$3,320

Scottsdale Cultural Council www.scottsdalearts.org To support technology and information systems upgrades in the renovation of Scottsdale Center for the Performing Arts.		
Sept. 8, 2008	\$350,000	\$301,000

Southwest Shakespeare Company www.swshakespeare.org To strengthen the organization's infrastructure and marketing efforts.		
Feb. 12, 2007	\$158,900	\$84,500

Theater Works www.theaterworks.org To assist in building strategic staffing and strengthening operational procedures in preparation for a move to the new Peoria Center for the Performing Arts.		
Feb. 13, 2006	\$195,000	\$50,000

West Valley Arts Council www.westvalleyarts.org To support organizational restructuring, branding and strategic planning efforts.		
Jul. 14, 2008	\$20,000	\$20,000
Subtotal Arts and Culture		\$4,080,913



Desert Botanical Garden

Children

Award Date	Amount	Paid FY 09
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A New Leaf www.prehab.org A Community Relief Grant to support the La Mesita family shelter.		
Nov. 10, 2008	\$20,000	\$20,000

A Stepping Stone Foundation www.astepplingstone.org To provide start-up supplies for a new preschool program in the Fowler District and strengthen other programs.		
Oct. 13, 2008	\$19,425	\$19,425

Assistance League of Phoenix www.phoenix.assistanceleague.org To provide school clothing or uniforms to children from low-income families.		
Oct. 9, 2006	\$75,000	\$25,000

Association of Arizona Food Banks www.azfoodbanks.org To provide general support in celebration of the Trust's open house.		
Nov. 10, 2008	\$25,000	\$25,000

Association of Arizona Food Banks www.azfoodbanks.org A Community Relief Grant to support meal services.		
Nov. 10, 2008	\$30,000	\$30,000

Association of Arizona Food Banks www.azfoodbanks.org A Community Relief Grant to support bulk food purchase and distribution of emergency food boxes.		
Jan. 12, 2009	\$30,000	\$30,000

Best Buddies Arizona www.bestbuddiesarizona.org To support extracurricular clubs in Valley high schools that offer social inclusion opportunities for special education students.		
Jan. 14, 2008	\$150,000	\$50,000

Boy Scouts of America - Grand Canyon Council, Inc. www.grandcanyonbsa.org To support a capital campaign to upgrade existing facilities and expand scouting programs for youth.		
May 12, 2008	\$800,000	\$200,000

Central Arizona Shelter Services www.cass-az.org A Community Relief Grant to support the Vista Colina shelter.		
Nov. 10, 2008	\$25,000	\$25,000

Child & Family Resources, Inc. www.childfamilyresources.org To support a parent education program for teen mothers in Maricopa County.		
Sept. 10, 2007	\$75,000	\$25,000

Child Abuse Prevention License Plate Program www.azcentral.com/advert/childplate To provide continued support for the Child Abuse Prevention License Plate Program.		
Jan. 14, 2008	\$150,000	\$50,000

Chrysalis Shelter for Victims of Domestic Violence, Inc. www.noabuse.com To support a capital campaign to expand emergency services and to build a family outreach center to serve families at risk for domestic violence.		
Sept. 10, 2007	\$650,000	\$200,000

Clinica Adelante, Inc. (new name Adelante Healthcare) www.clinicaadelante.com A Community Relief Grant to support the Rural Health Team Mobile Medical Clinic.		
Jan. 12, 2009	\$20,000	\$20,000

Crisis Nursery, Inc. www.crisisnurseryphx.org To support shelter services and a new day-respite program for children whose families are in crisis.		
Jan. 12, 2009	\$600,000	\$300,000

First Things First www.azcedh.gov To support program transition to First Things First and distribute Arizona Parent Kit in Maricopa County for two years.		
Mar. 4, 2009	\$3,142,410	\$0

Gabriel's Angels www.gabrielsangels.org To support technology enhancements to improve volunteer and donor communications.		
May 12, 2008	\$50,000	\$50,000

Girls For A Change www.girlsforachange.org To provide leadership opportunities for girls from low-income communities in Maricopa County.		
May 12, 2008	\$90,000	\$40,000

HomeBase Youth Services www.hbys.org A Community Relief Grant to support emergency housing services.		
Nov. 10, 2008	\$20,000	\$20,000

Homeward Bound www.hbphx.org To fund services for young children in families impacted by domestic violence and homelessness.		
Jun. 12, 2006	\$225,000	\$50,000

Kids at Hope www.kidsathope.org To support asset-based training for organizations serving youth in the West Valley.		
Jun. 11, 2007	\$72,000	\$36,000

Liberty Wildlife Rehabilitation Foundation, Inc. www.libertywildlife.org To support a capital campaign to build a permanent campus at Papago Park.		
Jan. 14, 2008	\$400,000	\$200,000

Maggie's Place www.maggiesplace.org A Community Relief Grant to support emergency housing services.		
Nov. 10, 2008	\$20,000	\$20,000

Pediatric Foundation of Arizona, Inc. www.azaap.org To develop a website that will improve health information and resources for adolescents, families and the community.		
Mar. 19, 2009	\$20,000	\$20,000

Rainbow Housing Assistance Corporation www.rainbowhousing.org To provide funds for afterschool programming for children in low-income families.		
Jul. 14, 2008	\$20,000	\$20,000

The Salvation Army www.tsasw.org A Community Relief Grant to support the Kaiser Family Center.		
Nov. 10, 2008	\$20,000	\$20,000

Southwest Human Development www.swhd.org To support the Infant Toddler Feeding Program by offering in-service presentations to medical professionals.		
Jun. 9, 2008	\$14,500	\$14,500

St. Mary's Food Bank Alliance www.firstfoodbank.org To support a capital campaign to expand food services including the Kids Café program.		
Oct. 13, 2008	\$750,000	\$0

Summer Youth Program Fund www.summeryouthprogramfund.org To support a collaborative effort among local funders to fund agencies providing summer programs for youth in Maricopa County.		
Aug. 14, 2006	\$300,000	\$100,000

Tumbleweed Center for Youth Development www.tumbleweed.org A Community Relief Grant to support emergency housing services.		
Nov. 10, 2008	\$20,000	\$20,000

UMOM New Day Centers www.umom.org A Community Relief Grant to support emergency housing services.		
Nov. 10, 2008	\$75,000	\$75,000

The University of Arizona Foundation www.al.arizona.edu/foundation To support the expansion of the Understanding Youth Development program, a 36-hour certificate program for youth development professionals, into Maricopa County.		
Nov. 10, 2008	\$20,000	\$20,000

Valley of the Sun United Way www.vsuw.org To provide funding for the Adopt-A-Pool-Fence program to support 13 additional pool fence installations.		
Jun. 9, 2008	\$20,000	\$20,000

Valley of the Sun United Way www.vsuw.org To support the Adopt-a-Pool-Fence program, which provides free pool fences to low-income families with children ages six or younger.		
Jul. 14, 2008	\$275,000	\$275,000

Valley of the Sun United Way www.vsuw.org A Community Relief grant to support the collaborative efforts of funders in Maricopa County to match community donations through ChooseToHelp.org.		
Feb. 9, 2009	\$325,000	\$325,000

Subtotal Children	\$2,344,925	
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Education

Award Date	Amount	Paid FY 09
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Arizona College Scholarship Foundation
www.azcsf.org
To support the American Dream Fund established for undocumented college students.

Jul. 14, 2008	\$400,000	\$200,000
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Arizona Quest for Kids
www.azquestforkids.org
To support a mentoring program for academically successful youth from low-income families.

Sept. 10, 2007	\$100,000	\$30,000
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Be A Leader Foundation
www.bealeaderfoundation.org
To improve technology for underserved students through e-mentoring.

Jan. 7, 2009	\$20,000	\$20,000
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Boys Hope Girls Hope of Arizona
www.bhghaz.org
To design and implement mentoring services for academically successful youth from low-income families.

Sept. 10, 2007	\$100,000	\$50,000
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Chicanos Por La Causa, Inc.
www.cplc.org
To support a fund established for undocumented college students.

Jul. 14, 2008	\$200,000	\$200,000
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The College Depot
www.azfoundation.org
To support a collaborative effort to create a college access center to serve Valley students.

Jan. 14, 2008	\$300,000	\$50,000
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Expect More Arizona Fund
www.azfoundation.org
To support the Expect More Arizona Fund, a public-private partnership to build public awareness of the importance of education in Arizona.

Apr. 14, 2008	\$200,000	\$200,000
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International Rescue Committee
www.theirc.org/where/united_states_phoenix_az
To support a new interpreter project that will benefit young refugee children and their families.

Jan. 12, 2009	\$100,000	\$100,000
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Junior Achievement of Arizona, Inc.
www.jaaz.org
To support a capital campaign to expand JA BizTown II, a hands-on entrepreneurial learning program for youth.

Sept. 8, 2008	\$250,000	\$150,000
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Maricopa County Community College District Foundation
www.dist.maricopa.edu/foundation
To support a capital campaign to expand and sustain the Achieving a College Education (ACE) dropout prevention program.

Dec. 6, 2004	\$1,000,000	\$500,000
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Science Foundation Arizona
www.sfaz.org
To provide operational support including personnel and program costs.

Jan. 12, 2009	\$400,000	\$0
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Teach For America, Phoenix
www.teachforamerica.org
To support a new Early Childhood Education Initiative to place corps members in pre-kindergarten programs in low-income areas of Maricopa County.

May 12, 2008	\$300,000	\$50,000
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Subtotal Education	\$1,550,000	
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Biodesign at ASU

Health and Medical Research

Award Date	Amount	Paid FY 09
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American Heart Association
www.americanheart.org
To implement the Healthy Schools Program to fight childhood obesity in Maricopa County.

Sept. 8, 2008	\$300,000	\$150,000
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Arizona State University Foundation
www.asufoundation.org
To create the ASU Center of Geriatric Nursing Excellence.

Sept. 10, 2007	\$500,000	\$100,000
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Arizona State University Foundation
www.asufoundation.org
To create the Virginia G. Piper Center for Personalized Diagnostics in partnership with TGen.

Sept. 10, 2007	\$13,022,433	\$1,250,000
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Banner Health Foundation
www.bannerhealth.com
To support a capital campaign to expand the Children's Hospital at Banner Desert Medical Center in Mesa.

Jan. 14, 2008	\$1,500,000	\$500,000
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Central Arizona Shelter Services
www.cass-az.org
To support the purchase of heat relief supplies for individuals using services at the homeless Campus facilities during the summer.

Jul. 14, 2008	\$5,000	\$5,000
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Creative Nonfiction Foundation
www.creativenonfiction.org
To develop a special issue of the journal Creative Nonfiction and a subsequent book on personalized medicine to inform the general public about the coming revolution in medicine.

Mar. 10, 2008	\$250,000	\$250,000
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Delta Dental of Arizona Foundation
www.deltadentalaz.com/foundation
An expenditure responsibility grant to provide dental sealants for uninsured children in the Alhambra, Osborn and Washington school districts.

Jun. 12, 2006	\$180,000	\$60,000
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Hospice of the Valley
www.hov.org
To launch a training program for hospitalists to effectively administer basic practices of palliative care to patients and their families.

Sept. 8, 2008	\$184,000	\$104,000
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March of Dimes Foundation
www.marchofdimes.com/arizona
To fund a hospital-based support program for parents and siblings of infants born prematurely.

Sept. 10, 2007	\$60,000	\$20,000
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Mission of Mercy
www.amissionofmercy.org
To support the purchase of a custom-designed mobile medical clinic that will increase outreach services.

Feb. 13, 2006	\$150,000	\$44,268
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Mission of Mercy
www.amissionofmercy.org
A Community Relief Grant to support the mobile health clinic.

Jan. 12, 2009	\$20,000	\$20,000
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Adopt-a-Pool-Fence Program

Older Adults

Award Date	Amount	Paid FY 09
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The Neighborhood Christian Clinic

www.thechristianclinic.org

To hire a full-time staff nurse practitioner to increase medical care to uninsured families.

Jun. 12, 2006	\$150,000	\$50,000
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Phoenix Children's Hospital Foundation

www.phoenixchildrens.com

To pilot the Healthy Steps program in the Neonatal Intensive Care Unit.

Jun. 11, 2007	\$200,000	\$100,000
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Phoenix Children's Hospital Foundation

www.phoenixchildrens.com

A Community Relief Grant to support the Crews'n Healthmobile.

Jan. 12, 2009	\$20,000	\$20,000
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Prevent Child Abuse Arizona

www.pcaaz.org

To support and expand the Never Shake A Baby Arizona program in Maricopa County.

May 12, 2008	\$68,000	\$34,000
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Ryan House

www.ryanhouse.org

To support a capital campaign to provide respite, palliative and end-of-life care to Valley children with life-limiting conditions.

Sept. 8, 2008	\$650,000	\$250,000
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The Salvation Army

www.tsasw.org

To support the annual Salvation Army Water Drive that supplies water to various hydration stations in Maricopa County.

Jun. 9, 2008	\$5,000	\$5,000
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Science Foundation Arizona

www.sfaz.org

An expenditure responsibility grant to help fund operating expenses.

May 1, 2006	\$600,000	\$200,000
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Scottsdale Healthcare Foundation

www.shc.org/foundation

To develop a community wide program to build and strengthen the health and wellness of Scottsdale residents and to become a Fit City in America.

May 14, 2007	\$10,000	\$5,305
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St. Joseph's Foundation

www.stjosephs-phx.org

To implement the Healthy Steps program to train medical personnel in child development.

Oct. 9, 2006	\$223,930	\$102,670
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St. Joseph's Foundation

www.stjosephs-phx.org

A Community Relief Grant to support the Maternity Outreach Mobile Clinic.

Jan. 12, 2009	\$20,000	\$20,000
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The Translational Genomics Research Institute (TGen)

www.tgen.org

To create the Virginia G. Piper Center for Personalized Diagnostics in partnership with the Biodesign Institute at Arizona State University.

Sept. 10, 2007	\$21,977,567	\$4,449,999
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Subtotal Healthcare and Medical Research		\$7,740,242
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Arizona Health Care Foundation

www.azhca.org

To provide fall prevention training sessions to designated staff of assisted living communities in Maricopa County.

Jun. 9, 2008	\$20,000	\$20,000
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Arizona Science Center

www.azscience.org

To provide meaningful volunteer leadership opportunities for people 55+ with backgrounds in science and math through the development and presentation of hands-on activities.

Sept. 10, 2007	\$43,000	\$15,000
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Big Brothers Big Sisters of Central Arizona

www.bbbsaz.org

To create additional site-based mentoring programs that will utilize the skills of older adult volunteers to expand the number of mentors for children.

Sept. 10, 2007	\$43,000	\$15,000
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The Centers for Habilitation

www.tch-az.com

To engage adults 55+ in becoming career development mentors and culinary specialists, assisting clients with disabilities to achieve career goals and to benefit from a more varied menu.

Sept. 10, 2007	\$43,000	\$15,000
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City of Mesa Arts and Culture Department

www.mesaartscenter.com

To support a collaborative among arts and culture organizations to integrate diversity in board management, volunteer opportunities, staff and educational opportunities by utilizing boomers.

Sept. 10, 2007	\$43,000	\$15,000
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City of Phoenix Human Services Department

www.phoenix.gov/humanservices

To support a planning grant for an independent study of the Senior Services Division's current meal operations to identify areas for improvement and cost savings.

Dec. 8, 2008	\$9,500	\$9,500
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City of Tempe Community Services Department

www.tempe.gov/socialservices

To implement Experience Corps, a program that places older adults in afterschool programs as tutors and mentors, in two elementary schools in Tempe as part of the Tempe Connections/Next Chapter project.

Jun. 12, 2006	\$297,397	\$75,000
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Civitan Foundation, Inc.

www.campcivitan.org

To create an employment program for older adults in Maricopa County.

Sept. 8, 2008	\$60,000	\$60,000
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Duet (former Beatitudes Center DOAR)

www.centerdoar.org

To engage adults 55+ in new leadership roles to strengthen Duet's capacity to serve greater numbers of homebound adults, family caregivers and grandparents raising grandchildren.

Sept. 10, 2007	\$43,000	\$15,000
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Friends of the Tempe Public Library

www.friendsofthetempelibrary.org

To support a program that utilizes the talent and experience of 50+ adults and connects them to programs, opportunities and services and provides opportunities for meaningful community involvement.

Sept. 10, 2007	\$43,000	\$15,000
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GateWay Community College

www.gatewaycc.edu

To create a Workforce Transition Center that will recruit, train and place boomers interested in employment in the healthcare, education and social services fields.

Sept. 10, 2007	\$460,800	\$144,900
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Governor's Advisory Council on Aging

www.azgovernor.gov/gaca

To create a Fall Prevention Coalition for Maricopa County launching a technical assistance website, increasing the number of "Matter of Balance" trainers and disseminating marketing materials.

May 12, 2008	\$138,300	\$92,300
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Governor's Office on Aging

www.azgovernor.gov/aging

To provide support for the 2008 Governor's Conference on Aging.

Apr. 14, 2008	\$6,260	\$465
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Hacienda HealthCare

www.haciendahealthcare.org

To recruit and cultivate 55+ retired registered nurses to volunteer as mentors for new nursing graduates hired to serve the agency's chronically ill infants, children and young adults.

Sept. 10, 2007	\$43,000	\$15,000
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Interfaith Community Care

www.interfaithcommunitycare.org

To recruit adults 55+ to assist in developing three business plans for the enterprises at the new Surprise campus and to serve in significant positions in the new café, bookstore and child development center.

Sept. 10, 2007	\$43,000	\$15,000
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The Translational Genomics Research Institute (TGen)

Mesa United Way

www.mesaunitedway.org

To establish senior advisors to the Mesa United Way Board to provide detail on community indicators, identifying organizations and potential partners to address community needs for positive change.

Sept. 10, 2007	\$43,000	\$15,000
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National Council on Aging, Inc.

www.ncoa.org

To provide technical support for up to 10 nonprofit organizations in Maricopa County in the National Council on Aging's project engaging and managing age 55+ volunteers in professional and leadership roles.

Jun. 11, 2007	\$196,000	\$98,000
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National Farm Workers Service Center, Inc.

www.nfwschousing.org

To support the Spirit, Mind and Body Program, a healthy aging program for older adults at Glendale Hacienda, an affordable housing community for low-income older adults.

Jun. 11, 2007	\$137,000	\$45,000
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Rebuilding Together Valley of the Sun

www.rebuildingtogetherphx.org

To create a Senior Fall Prevention Services program for low-income older adult homeowners in the Phoenix metro area.

Jun. 11, 2007	\$204,000	\$68,000
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Regional Community Partners

To support the Transportation Ambassador Program (TAP), which coordinates specialized training of volunteers on human services transportation.

Jul. 14, 2008	\$20,000	\$20,000
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Scottsdale Healthcare Foundation

www.shc.org/foundation

To implement a coordinated community-based fall prevention program at Pueblo Sereno Mobile Home Park in Scottsdale.

Sept. 8, 2008	\$103,000	\$67,000
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Solecito Services, Inc.

To purchase and maintain home health equipment and upgrade computers.

Oct. 13, 2008	\$8,000	\$8,000
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Sun Health Foundation

www.sunhealth.org

To engage retirees in the West Valley in building the capacity of volunteering by making substantial changes in the type and quality of assignments.

Sept. 10, 2007	\$43,000	\$15,000
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The Tremble Clefs Arizona Chapter, National Parkinson's Foundation

www.trembleclefs.com

To support expansion of the established choral music program that helps Parkinson's patients strengthen their voices.

Oct. 13, 2008	\$20,000	\$20,000
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YWCA of Maricopa County

www.ywca.org/maricopacounty

A Community Relief Grant to support the home delivered meal program for low-income older adults.

Jan. 12, 2009	\$20,000	\$20,000
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Subtotal Older Adults	\$898,165	
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Other

Award Date	Amount	Paid FY 09
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A New Leaf

www.prehab.org

A Community Relief Grant to support the East Valley Men's Center.

Jan. 12, 2009	\$20,000	\$20,000
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Alliance of Arizona Nonprofits

www.arizonanonprofits.org

To support a community partnership that increases capacity and develops resource sharing opportunities for nonprofit agencies.

Sept. 8, 2008	\$200,000	\$100,000
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Arizona Planned Giving Institute

www.azebi.org/organization

To support the education and mentoring of nonprofit agencies to build endowments.

Jan. 14, 2008	\$87,400	\$43,700
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The Center for Leadership, Ethics and Public Service

To underwrite distribution of 500 copies of Advocacy by Arizona Nonprofits through the Arizona Alliance of Nonprofits.

Jul. 14, 2008	\$10,000	\$10,000
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Central Arizona Shelter Services

www.cass-az.org

A Community Relief Grant to provide general support.

Oct. 13, 2008	\$25,000	\$25,000
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The Collaboration for a New Century, Inc.

www.thecollab.org

To support the AZ LeaderForce Initiative and develop a network of community leaders and human service partners.

Oct. 13, 2008	\$12,500	\$12,500
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Community Information & Referral

www.cir.org

A Community Relief Grant to support telephone system enhancements.

Jan. 12, 2009	\$20,000	\$20,000
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Human Services Campus, LLC

www.maricopa.gov/hscampus

To create a permanent endowment for the Human Services Campus to generate funds for operating the Lodestar Day Resource Center and providing maintenance/security for the campus.

Oct. 9, 2006	\$1,000,000	\$603,460
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Human Services Campus, LLC

www.maricopa.gov/hscampus

A Community Relief Grant to provide general support.

Oct. 13, 2008	\$50,000	\$50,000
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Lodestar Day Resource Center

www.lodestardrc.org

A Community Relief Grant to provide general support.

Nov. 10, 2008	\$25,000	\$25,000
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Media In The Public Interest, Inc.

www.mediainthepublicinterest.org

An expenditure responsibility grant to support the launch of a radio and online news service in Arizona through Public News Service.

Dec. 8, 2008	\$10,000	\$10,000
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PAFCO Education Fund

www.pafcoeducation.org

A Community Relief Grant to support access to information on critical human service issues.

Jan. 12, 2009	\$10,000	\$10,000
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Duet

Rio Salado Foundation

www.supportriosalado.org

To support reconstruction of the O'Connor House at its new Papago Park site.

Aug. 11, 2008	\$100,000	\$100,000
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Theresa Leon,
Piper Fellow,
Friendly House, Inc.



Marsha Porter, Piper Fellow,
The Crisis Nursery



Milon Pitts, Piper Fellow,
Homeward Bound

Historical Grants

Mrs. Piper supported a variety of organizations and projects in which the Trust continues to invest.

	\$570,000
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Trust Initiated Grants

Trust initiated grants include trustee advised, employee matching and other grants awarded as well as professional affiliation memberships.

	\$1,676,835
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Direct Charitable Activities

A Direct Charitable Activity is an activity and/or event, such as a Piper Academy that serves a charitable purpose and is conducted by the Trust.

	\$804,413
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Affiliations

Through membership in professional associations and organizations that support philanthropy, the Piper Trust's board and staff have opportunities to collaborate with and learn from colleagues from grantmaking organizations across the country.

Organizations include:

- Arizona Grantmakers Forum
- The Communications Network
- Conference of Southwest Foundations
- Council on Foundations
- Foundation Financial Officers Group
- Grantmakers for Children, Youth and Families
- Grantmakers for Effective Organizations
- Grantmakers in Aging
- Grantmakers in Health
- Grantmakers in the Arts
- Grants Managers Network

Subtotal Other	\$4,080,908
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Fellows

Award Date	Amount	Paid FY 09
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Chicanos Por La Causa, Inc.

www.cplc.org

To support Edmundo Hidalgo's sabbatical as a Piper Fellow and related staff development.

Nov. 10, 2008	\$40,000	\$0
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Clinica Adelante, Inc.

(new name Adelante Healthcare)

www.clinicaadelante.com

To support the professional development of management staff.

Nov. 14, 2005	\$10,000	\$10,000
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Crisis Nursery, Inc.

www.crisisnurseryphx.org

To support Marsha Porter's sabbatical as a Piper Fellow.

Nov. 13, 2006	\$21,432	\$21,432
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Foundation for Blind Children

www.seeitourway.org

To support Mark Nelson's sabbatical as a Piper Fellow and related staff development.

Nov. 10, 2008	\$40,000	\$14,300
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Friendly House, Inc.

www.friendlyhouse.org

To support Theresa Leon's sabbatical as a Piper Fellow.

Nov. 13, 2007	\$15,456	\$14,506
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Great Hearts Academies

www.greatheartsaz.org

To support Daniel Scoggin's sabbatical as a Piper Fellow and related staff development.

Nov. 10, 2008	\$40,000	\$0
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Religious Organizations

Homeward Bound

www.hbphx.org

To support the professional development of management staff.

Nov. 13, 2006	\$10,000	\$10,000
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Mountain Park Health Center Foundation

www.mphc-azfoundation.org

To support John Swagert's sabbatical as a Piper Fellow and related staff development.

Nov. 10, 2008	\$40,000	\$13,826
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Sojourner Center

www.sojournercenter.org

To support Connie Phillips' sabbatical as a Piper Fellow.

Nov. 13, 2007	\$11,636	\$11,636
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Southwest Autism Research & Resource Center

www.autismcenter.org

To support Lisa Glow's sabbatical as a Piper Fellow and management staff development.

Nov. 13, 2007	\$31,681	\$27,114
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Valle del Sol, Inc.

www.valledelsol.com

To support Kurt Sheppard's sabbatical as a Piper Fellow.

Nov. 13, 2007	\$17,271	\$17,271
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<i>Subtotal Piper Fellows</i>	\$140,085	
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André House of Arizona,

Inc. www.andrehouse.org

A Community Relief Grant to support meal services.

Nov. 10, 2008	\$10,000	\$10,000
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Arizona Jewish Historical Society

www.azjhs.org

To support a capital campaign to restore Phoenix's first synagogue as a museum, educational resource and cultural center.

Sept. 8, 2008	\$225,000	\$100,000
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Christ Church Lutheran

www.cclphoenix.org

To teach healthy living and life skills to at-risk children.

Aug. 11, 2008	\$15,425	\$15,425
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Paz de Cristo Community Center

www.pazdecristo.org

A Community Relief Grant to support meal services.

Nov. 10, 2008	\$10,000	\$10,000
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Phoenix Rescue Mission

www.phoenixrescuemission.org

To support the purchase and distribution of water and sports drinks for the homeless.

Sept. 8, 2008	\$5,000	\$5,000
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Phoenix Rescue Mission

www.phoenixrescuemission.org

A Community Relief Grant to support the men's shelter.

Jan. 12, 2009	\$20,000	\$20,000
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The Roman Catholic Church of Phoenix

www.diocesephoenix.org

To support critical health and safety capital improvements for 25 Catholic elementary schools in Maricopa County.

Jan. 14, 2008	\$8,000,000	\$1,500,000
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Society of St. Vincent de Paul

www.stvincentdepaul.net

To support an endowment and provide a challenge grant for the medical and dental clinics.

Sept. 13, 2004	\$3,000,000	\$400,000
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Society of St. Vincent de Paul

www.stvincentdepaul.net

A Community Relief Grant to provide general support.

Oct. 13, 2008	\$100,000	\$100,000
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St. Joseph the Worker

www.sjwjobs.org

A Community Relief Grant to provide general support.

Oct. 13, 2008	\$25,000	\$25,000
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Valley Christian Centers, Inc.

www.vccenters.org

To create a Senior Home Safety Project to ensure older adults are living in a safe and adequate living environment and are able to secure benefits to which they are entitled.

Feb. 12, 2007	\$194,830	\$96,750
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Valley of the Sun Jewish Community Center, Inc.

www.vosjcc.org

To provide partial funding for a community performing arts venue serving Northeast Scottsdale.

Jan. 20, 2009	\$20,000	\$20,000
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<i>Subtotal Religious Organizations</i>	\$2,302,175	
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TOTAL	\$23,137,413	
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Arizona Jewish Historical Society



Most Holy Trinity Elementary School

WHAT A DIFFERENCE A YEAR MAKES: CHIEF FINANCIAL OFFICER'S REPORT

Mary Jane Rynd
Executive Vice President and CFO



What a difference a year makes. When we were preparing for the annual report issue of *Piper Notebook* a year ago, we had no idea of the far-reaching implications of the current recession. The severity of the downturn has affected each of us individually and collectively—possibly

none more so than our nonprofit partners that have had pressures to do more over the year with fewer available resources.

Investments

During fiscal year 2008-2009, the value of Piper Trust's investments decreased from \$580 million to \$371 million. The \$209 million decrease included \$23 million in grant payments and Trust programs and a net investment decrease of \$181 million, among other things. Investment return (income less capital loss and investment fees) for the year was negative 32 percent.

Grant Spending

In fiscal year 2008-2009, Piper Trust payment for grants and Trust programs was \$23 million. Typically, the grant budget is based on five percent

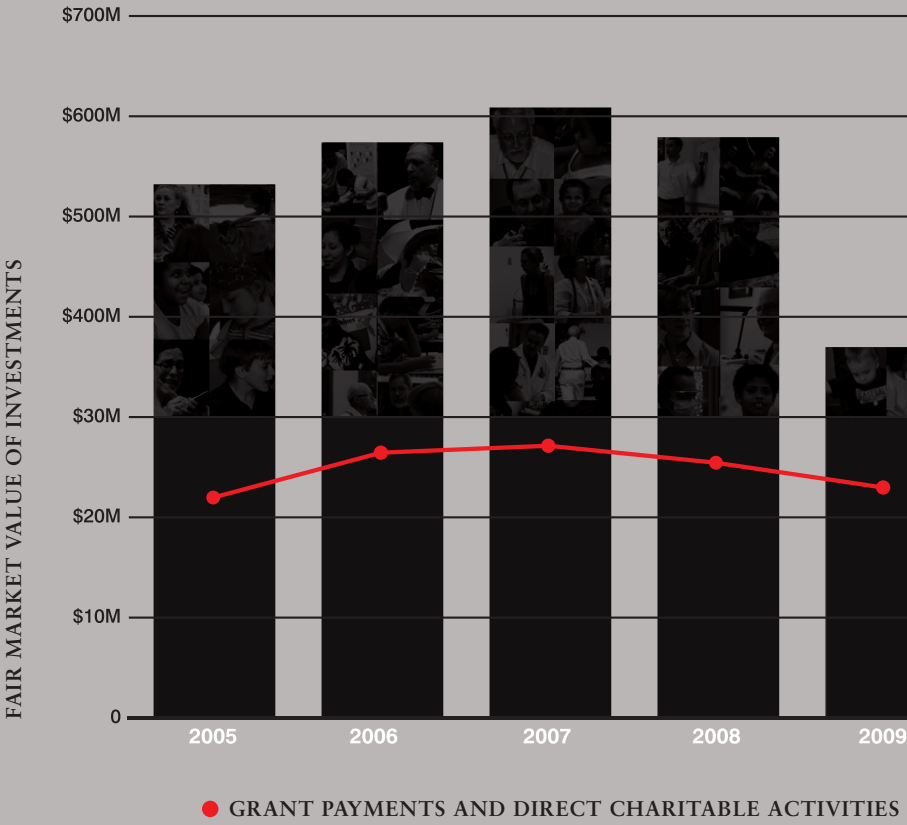
of a three-year average of the endowment's market value. This policy provides a relatively stable pattern of spending, despite fluctuations in securities markets.

In fiscal year 2008-2009, the Piper board of trustees awarded 659 grants totaling \$14.9 million, some of which will be paid in future years, and the Trust incurred expenses for 15 programs of \$804,000. During the fiscal year, \$23 million was paid on 798 grants, some of which were approved in prior years.

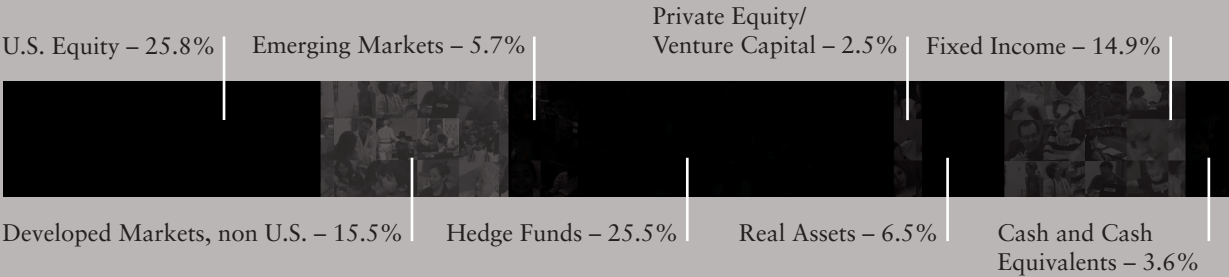
Future Years

While many economic indicators are still trailing locally and nationally, the stock market has generally improved. Through September 2009, the Piper endowment experienced a 28.5 percent gain. The rebuilding of assets will take time; however, the Piper board of trustees approved grant payment budgets of \$22 million for fiscal years 2009-2010 and 2010-2011. *

Fair Market Value of Investments and Charitable Expenditures



Piper Trust Asset Allocation



Change in Asset Values

(Accrual Basis)	3/31/2009	3/31/2008	3/31/2007
Investment Activity, Net	\$(180,880,068)	\$3,258,427	\$66,447,726
Grant Awards and Direct Charitable Activities	\$(18,200,354)	(\$61,273,381)	(\$22,858,138)
Grantmaking and Administrative Expenses	(\$4,374,465)	(\$3,536,526)	(\$2,794,702)
Federal Excise Tax Benefit (Expense)			
on Net Investment Income	\$449,268	(\$657,116)	(\$684,945)
Contributions Received	\$4,022,081	\$11,550	\$141,504
Total Change	(\$198,983,538)	(\$62,197,046)	\$40,251,445
	FY2009	FY 2008	FY 2007
Beginning Net Assets	\$541,816,520	\$604,013,566	\$563,762,121
Ending Net Assets	\$342,832,982	\$541,816,520	\$604,013,566

ENDNOTE



VIRGINIA G. PIPER CHARITABLE TRUST

Virginia G. Piper Charitable Trust is a private, independent foundation committed to honoring Virginia Galvin Piper’s legacy of supporting organizations whose work enhances the lives of people in Maricopa County, Arizona. By investing in nonprofits and encouraging strategic planning for the future, Piper Trust strives to make Maricopa County a stronger, more nurturing and vibrant community. Piper Trust focuses grantmaking on healthcare and medical research, children, older adults, arts and culture, education and religious organizations.

As a place-based philanthropy concentrating on Maricopa County, Piper Trust works to be more than a grantmaker. The Trust convenes groups to address community issues, brings national thought leaders to meet with nonprofit executives and fosters collaboration in the philanthropic sector. Piper Trust introduced the Piper Fellows Program in 2001 to enable nonprofit leaders to take sabbaticals for renewal and professional development.

Piper Trust has invested more than \$250 million in nonprofits and programs. *

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