

FOR IMMEDIATE RELEASE

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Arizona Endowment Building Initiative Helps Charities Look to the Future

PHOENIX, Ariz. – The Desert Botanical Garden, 50 acres of unique outdoor desert exhibits in Phoenix, is internationally-recognized for its plants as well as research, desert conservation and educational programs. Funded through the generosity of private funds, grants and membership support, the leaders of this 63-year-old desert oasis nestled against the red buttes of Papago Park now have a new way of looking at fund raising.

As a graduate of the first class of six charities from the Arizona Endowment Building Institute (AEBI)'s intensive 18-month proprietary endowment building program, the Desert Botanical Garden is on a faster track raising more money than ever before to ensure its future.

“Our marketing efforts are working. We now have a solid 12-month plan to advance our endowment building efforts for the coming year.”

Desert Botanical Garden

The program was created in Phoenix several years ago when the organizers of AEBI recognized that while many Arizona charities address the needs of the communities they serve, they often survive “paycheck-to paycheck” with little or no planning for long-term financial sustainability. Also, typical fundraising efforts continue to take a heavy toll on staff members, leading to an average tenure of only 18-months for development officers.

When leaders of AEBI couldn't find the program they envisioned to educate local charities about the importance of endowment building and how to integrate such efforts into their existing development programs as a way to provide a secure source of future funding, they created their own with an initial grant from the Stardust Foundation. This unique training program was launched in June, 2005.

Classes are intended for established charities with at least 10 years of operation and a minimum annual budget of \$1 million. Each organization's team includes its CEO, development director and at least two leadership level Board members, all of whom are required to participate. The program is comprehensive and it not only educates, but also builds commitment to solicit, accept and manage gifts.

In addition to a strong curriculum, AEBI strengthens the real world application of what it teaches via a mentoring program. Assigning a team of two proven development or estate planning allied professionals to partner with each charity team helps to keep each charity's endowment building efforts moving along at the program's challenging pace. Mentors attend all training sessions, serve as the program's “brain trust” to insure that

curriculum offerings adapt to meet the unique challenges present with each Class, and assist their assigned charity in developing, and implementing, the program's teachings.

The first class of six nonprofit organizations that successfully graduated the program in September 2007 report that they have now collectively raised more than \$24 million in current and deferred gifts for their endowment building efforts. The second class of five organizations began in September, 2007.

Joining the Desert Botanical Garden in Class 1 were Crisis Nursery- Phoenix, Florence Crittenton Services, the Phoenix Zoo, Foundation for Blind Children and the Valley Presbyterian Church Foundation. Charities participating in Class 2 of AEBI include Ballet Arizona, Beatitudes Center DOAR, HomeBase Youth Services, Prescott College and Southwest Autism Research & Resource Center.

Due to the demonstrated success of AEBI's program, the Arizona Planned Giving Institute is now recruiting a third class to begin January, 2009. Interested organizations are encouraged to apply by June 20 of this year. Contact AEBI Director, Carrie Kinnear, at (602) 279-9166 or via email to info@azebi.org for complete application information.

To be eligible, charities must have at least a 10 year history in Arizona, sufficiently large donor and volunteer databases, and at least a five-year history of fundraising generating a minimum of \$250,000 annually from individuals. For a full list of the program's selection criteria, please visit the AEBI website, www.azebi.org.

AEBI is a collaborative effort of the Stardust Foundation, the Arizona Community Foundation, the Virginia G. Piper Charitable Trust and participating charities. It's the flagship program of the Arizona Planned Giving Institute, an Arizona 501(c)(3).

Arizona Planned Giving Institute board members include Chair Mike Cohn, managing director, CFG Business Solutions, LLC; John Ferree, president, Scottsdale Healthcare Foundation; Jacky Alling, vice president/programs, Arizona Community Foundation, Alan Knobloch, director of planned giving, Valley of the Sun United Way, and Harold Dorenbecher, senior vice president and managing executive of the Phoenix office of Northern Trust Bank, N.A. Mentor representatives are Steve Case and Tom Acton.

Program fact sheet attached

Arizona Endowment Building Initiative

Fact Sheet

- A unique 18-month training program teaching selected charities endowment building skills to provide greater financial stability for their organization.
- Launched June, 2005 with an initial grant from the Stardust Foundation.
- Six charities completed the first class beginning March 2006; second class of six began September 2007.
- Selected charities have been in operation for at least 10 years and have an annual operation budget of at least \$1 million.
- Instruction is supported by volunteer mentors who are development professionals, or estate planning allied professionals - two per charity.
- Uses planned giving techniques with implementation by boards, volunteers and staff.
- Participating charities receive grants for marketing, prospect development, staffing.
- Graduating charities increased endowment goals from approximately \$2 million to \$10 million.
- Supporting grants come from the Stardust Foundation, Arizona Community Foundation and the Virginia G. Piper Charitable Trust .
- Participating charities pay \$5,000 each to participate.
- Carrie Z. Kinnear is the Director of the program.
- It's the flagship program of the Arizona Planned Giving Institute, a 501(3)(c).