

VK SC Community Fund

FUNDRAISING

# Community Fund begins donor campaign

## Agency provides help to Sun Citians in need

By Rusty Bradshaw  
INDEPENDENT NEWSPAPER

Sun City residents will be receiving letters asking for their help as the Community Fund Board of Directors opened the 2016 fundraising campaign.

A Valley of the Sun United Way agency, the Sun City Community Fund has, for nearly 50 years, helped Sun Citians in need with a vari-

ety of assistance. An example of this service is when a terminally ill resident could not reach his son deployed in Afghanistan. After asking for help through the Community Fund, the American Red Cross was able to locate the son and arrange for him to visit with his father.

The Community Fund's main source of income is the generosity of Sun City residents. The gifts are the main support for the Personal Needs Fund.

"The need for our financial

help increases every year," Mr. Green said. "So we must depend on our friends to give us the power to help. Because all of us are volunteers, all money raised in Sun City remains to work in Sun City."

All contributions to the Sun City Community Fund are income tax deductible. Contributions can be sent to Sun City Community Fund, P.O. Box 1355, Sun City, AZ 85372-1355.

The most visible support system for Sun City residents

» See Fund on page 12



Clarisse Mayer, SCHOA Marketing Department; Loretta Stines, Western State Bank; and Marlene Hoskins, SCHOA marketing Department; preparing the 800 mailing pieces for the 2016-17 Sun City Community Fund campaign. [Submitted photo]

## Fund

» From page 1

is the Personal Needs Fund, a cash fund administered by the Sun City Home Owners

Association, according to Carole Studdard, SCHOA marketing director. In its second year partnering with SCHOA, Community Fund officials use the Personal Needs Fund to help

residents in emergency situations.

"The partnership with SCHOA has been exceptionally good," said Jim Green, Community Fund board president. "The SCHOA

staff members are committed to supporting our Sun City neighbors, and the Personal Needs Fund is the perfect way for them to provide support for people in financial crises."

The Personal Needs Fund allows administrators to come to people's aid faster than through other channels, according to Mr. Green.

"One neighbor's financial plight occurred last month, and SCHOA was able to alleviate the crisis immediately," he reported during a community meeting.

A three-time lung cancer survivor, still enduring the costly chemo therapy, required a physical regimen provided at the local recreation center. Her medical treatments were so expensive she had no money to pay her recreation fee. She was too young to get help from any other Sun City resource.

"Using the Personal Nee-

da Fund, SCHOA paid her recreation fee," Mr. Green explained. "The woman's thank-you note was one of the most touching expressions of absolute gratitude I've read in a long time."

Contact Ms. Studdard at 623-974-4718 ext. 211 for information on the Personal Needs Fund.

For the past five years, Fund officials' goal for the mail campaign was \$13,000. The amount raised in 2012 was larger because the Fund received a bequest for \$3,000 that year, according to Mr. Green.

"Our board members and I agreed that it would be wiser to add this \$3,000 to the annual fund than to put it with the SCCF share of the United Way endowment," he said.

Because volunteers do a lot of the mailing preparation and the letter is created in-house at United Way, the Fund's total expenses for

the mailing at the end of the year is less than 8 percent of the total income, Mr. Green explained.

Last year, the income was lower than in other years.

"One reason can be that there was no real sense of urgency in the letter," Mr. Green said. "We introduced our partnership for the Personal Needs Fund with the Sun City Home Owners Association. There was no story to share with the prospective donors."

During the past five campaigns the Community Fund raised \$13,518 in 2011, \$17,349 in 2012, \$14,136 in 2013, \$13,418 in 2014 and \$11,785 in 2015.

**Editor's Note: The Independent believes in sharing our potential conflicts of interest. News Editor Rusty Bradshaw is a member of the Sun City Community Fund Board of Directors.**



Sun City resident Jim Green briefs the Sun City Home Owners Association Board of Directors and residents attending a meeting about the Sun City Community Fund coming under the SCHOA umbrella. Independent Newspapers/Rusty Bradshaw

# Community Fund busts a move

Marcum: SCHOA provides opportunities to serve more

By Rusty Bradshaw  
Independent Newspapers

The Sun City Community Fund is now coordinated by a different agency, but officials believe that will allow for more people in need to be helped.

The fund, part of the United Way fundraising effort Valleywide, was for several years coordinated by Banner Olive Branch Senior Center, 11250 N. 107th Ave. However, United Way officials believe putting the fund under the auspices of the Sun City Home Owners Association will increase those who can be helped, according to Twyla Marcum, Valley of the Sun United Way vice president of corporate relations.

"We enjoyed our partnership with Olive Branch, and it will continue," she ex-

## What do you think?

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• Email: [rbradshaw@newszap.com](mailto:rbradshaw@newszap.com)

plained. "But we felt (the change) gives us the opportunity to leverage the skill sets of both agencies."

Sun City resident Jim Green, who has served as the individual Community Fund coordinator in Sun City, agrees.

"It is not their (Olive Branch) role, nor do they have the resources to be out in the community," Mr. Green said.

However, with its role to enforce the community CC&Rs and its two property cleanup programs, SCHOA officials are interacting with residents in their homes fre-

quently, he added.

"SCHOA already has programs in place, they are just light on financial resources," Mr. Green said.

Ivy Glinski, Banner Olive Branch director, believes the switch works out well.

"We do work with them now, referring people back and forth," she said. "We will continue to work together."

Lloyd Maple, SCHOA board president, said the Community Fund will be an asset to Sun City residents because it will provide additional funds for its community intervention programs — one for residents who physically or financially cannot keep up their properties and the other for vacant properties that simply are not maintained. The former allows volunteers and SCHOA staff to clean up a property at no cost to the owner. The latter program also sees properties cleaned by volunteers and staff, but the

See Fund — Page 3

VF SC Community Fund Independent Newsprint November 4, 2015

# Fund

Continued From Page 1

owner is billed for the cost.

"There have been situations when we needed the funds but did not have them," Mr. Maple said. "We are absolutely excited about this."

Like Olive Branch when it administered the Community Fund, SCHOA will be paid a \$200 monthly administration fee, Ms. Marcum said.

"SCHOA can meet residents in their homes early in a crisis so we can hopefully avoid problems becoming too severe," she said.

However, Mr. Maple said SCHOA, although it has increased access to residents, still struggles identifying people in need because of the mindset in the community.

"Our biggest problem is finding those people because a lot are reluctant to admit they need help," he said.

He said, like CC&R enforcement, which is complaint-based, SCHOA will rely on neighbors to help identify those people in the most need.

"We still want residents to be our eyes and ears," Mr. Maple said.

In terms of how it operates, little will change for the Sun City Community Fund, according to Mr. Green. The fund has an endowment of \$4 million and draws on that to make \$25,000 worth of disbursements to various human service agencies annually.

Those agencies include the Alzheimer's Association, American Cancer Society, American Heart Association, American Red Cross, Arizona Center for Blind and Visually Impaired, Arizona Literacy and Learning Association, Arizona YWCA Metropolitan Phoenix, Banner Olive Branch Senior Center, Community Legal Services, Girl Scouts Arizona Cactus-Pine Council, New Pathways for Youth, St. Mary's Food Bank Alliance, Salvation Army and Valley of the Sun YMCA.

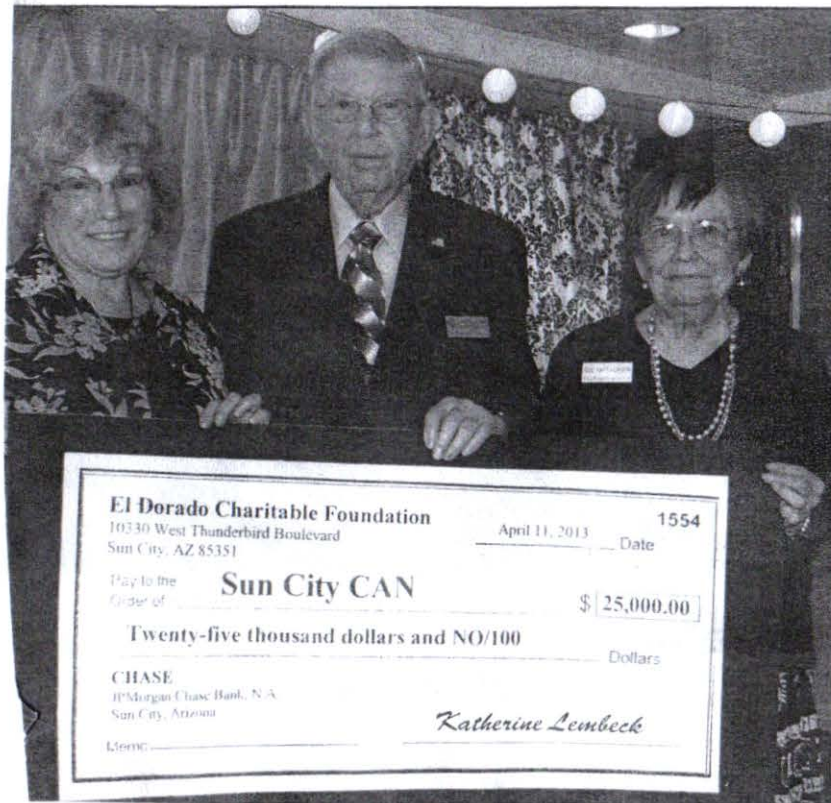
"Another program, unique to Sun City in the country's United Way movement, is the Personal Needs Fund," Mr. Green said. "This cash fund helps Sun City residents who are experiencing an unforeseen financial crisis."

He echoed Ms. Marcum's stance that Olive Branch will remain a strong partner.

"Olive Branch has been wonderful for us, we have been very successful with them," he said. "But we will continue to have the benefit of their resources."

United Way is beginning its annual major fundraising campaign, both through the mail and presentations at businesses asking workers to donate through payroll deductions. Mr. Green said donors can designate their contributions remain in Sun City to support community agencies.

The Sun City Community Fund is also overseen by a board of directors composed of residents and area business people. The board meets quarterly.



## The big bucks

Jan Hughes, left, Sun City Community Assistance Network executive director, accepts a check for \$25,000 from Walt Hulden, center, El Dorado president, and Katy Lembeck, El Dorado Charitable Foundation president, during the associations' April in Paris fashion show last week. The contribution is the largest Sun City CAN has received in its history. The foundation's contribution represents more than one-third of Sun City CAN's annual expenses. The nonprofit organization, based in Sun City, provides a wide variety of services for West Valley residents, including benefits check-ups, tax preparation, resource referral and legal services, among others. The Sun City CAN office is located at 10195 W. Coggins Ave.

Independent Newspapers/Rusty Bradshaw

# Community Fund has monies for emergencies

By Rusty Bradshaw  
Independent Newspapers

Personal needs committee member of the Sun City Community Fund are looking for people who have emergency needs. The Community Fund is available to provide help.

Working closely with Valley of the Sun United Way, the Community Fund provides financial assistance to needy Sun City residents. The organization has been operating for 30 years but lately has not had requests enough to use all the funds available annually, according to Jim Green, fund board president.

"We can help people who are in dire

need," Mr. Green said. "Many people in Sun City live on fixed incomes and have financial emergencies they can't meet on their own."

People eligible for personal needs assistance must have lived in Sun City at least 12 months, according to Ivy Shirley, Olive Branch Senior Center manager. Previously, the minimum age was 65 to receive assistance, but in its annual meeting April 16 the Community Fund board lowered the minimum age to 60.

"There are a lot of people between 60 and 65 that are in a limbo state between being able to qualify for various assistance programs, so lowering the age makes sense," Ms. Shirley said.

The Community Fund receives \$25,000

per year from United Way for personal needs assistance. The allocation comes directly from Sun City.

"Money donated by Sun City residents are used to put back into the community through this program," Mr. Green said.

The organization has spent nearly half its 2008-09 allocation and has more than \$14,000 available until June 30, the end of the fiscal year, according to Mr. Green.

Through its endowment fund, the Community Fund board also assists other United Way agencies operating in Sun City. These agencies include the Alzheimer's Association, American Red Cross, Foundation for Senior Living, Jewish Family and Children's Services, St. Mary's Westside Food Bank,

Sun Cities Area Transit and Banner Olive Branch Senior Center, according to Mary Lou Valenzuela, Valley of the Sun United Way vice president for public relations.

The Community Fund board also approved, in last week's annual meeting, a major change in its endowment fund. Members approved merging it with United Way's endowment fund. The move will allow the endowment fund, at about \$2.5 million, to be matched by Jerry Biscroft.

"The endowment fund will be matched 50 cents on the dollar from the benefactor," Mr. Green said.

Assistance provided through the Com-

See Fund — Page 6

## Fund

Continued From Page 1

munity Fund's annual United Way allocation includes utility bills, emergency home repairs, medications, medical expenses and others. Requests for assistance can be made at the Olive Branch Senior Center, 11250 N. 107th Ave., or call 6230974-6797.

Residents can apply as many times as is necessary but can receive no more than \$3,000 total, according to Ms. Shirley. No money will be given to the applicant. Instead, the fund will pay directly the obligation requested, she explained.

Ms. Shirley, with help from center staff and volunteers, administer the Community Fund, but no funds are released without personal needs committee approval, Mr. Green said.

"This fund is overseen by a volunteer board," he said.

Following a request for assistance, an

applicant will be visited in their home by at least two Community Fund volunteers. They will use the interview and observation of the applicant's home surroundings to help them determine the level of need. If a request is denied, Community Fund volunteers refer the applicant to other resources.

The interview process is necessary to weed out those who abuse the system, according to Ms. Shirley.

"We work real hard to avoid abuse," she said.

Jane Freeman, committee member, cited a case in which a woman was posing as two different individuals to get double assistance and this was discovered and future requests were denied.

*Post your opinions in the Public Issues Forum at [www.newszap.com](http://www.newszap.com). News Editor Rusty Bradshaw can be reached at 623-445-2725 or [rbradshaw@newszap.com](mailto:rbradshaw@newszap.com).*

# Sun City Community Fund reaches out to neighbors

ANNIE BOON  
DAILY NEWS-SUN

It has been 40 years since the Sun City Community Fund launched its mission to bring critical services to Sun Citians in need.

To celebrate the milestone, the SCCF and some of its partners sponsored an open house Wednesday at Wells Fargo Bank in Sun City.

"We're proud of the wide variety of support we can provide," said Jim Green, SCCF president. "Crisis intervention, family counseling, socialization, transportation, personal needs, respite care. We even provide emergency financial assistance.

"These services touch so many people every year. We want everyone to know how we can help — neighbors helping neighbors."

## FYI

The Sun City Community Fund's annual campaign will begin later this month. The goal is \$175,000. Every dollar given to the SCCF will be matched on a one-to-one basis by the fund foundation, Sun City Community Fund is a part of Valley of the Sun United Way. For information about the community fund and the annual campaign, call 933-5190.

The Alzheimer's Association, American Red Cross, Jewish Family & Children's Services, St. Mary's/Westside Food Bank Alliance, Sun Cities Area Transit, Olive Branch Senior Center, Sun Health Personal Care Services and Volunteers for Hospice had representatives at the open house to discuss how they serve Sun City. Olive Branch, along with Chef Larry Long, donated refreshments.

Sun City residents Angie Underwood and her mother, Barbara, visited the various organizations represented at the open house.

"I'm here taking care of my parents who have health issues, and I wanted to learn what resources are available," said Angie, adding that she appreciates how the Sun City Community Fund brings several senior service organizations together. "That's especially for seniors who have a limited amount of energy to investigate things. There's so many things you don't know exist until you're exposed to it."

The SCCF Personal Needs Committee directly helps Sun Citians with financial assistance, as well as connections to continued resource options.

Jan Pinter, who leads the



ANNIE BOON/DAILY NEWS-SUN

Barbara Underwood, left, speaks with Marty Miller, a representative from the Alzheimer's Association, at the Sun City Community Fund open house Wednesday. Underwood's daughter, Angie, right, gathered booklets and brochures about the organizations represented.

committee, said if, for example, a resident on a fixed income was faced with a broken air-conditioning unit and no way to pay for a new one, the Personal Needs Committee through the SCCF would purchase a new one for the resident. Volunteers make up the staff of the committee, and donations from Sun City residents support its cause.

"Donations from Sun City

help Sun City," Pinter said. "Very few people realize that. When people are helped, we can say it was because their neighbor made a donation."

For information about the SCCF and the annual campaign, call 933-5190.

For information about the SCCF Personal Needs Committee, to request assistance or to volunteer, call 974-7500.

# Panel begins community fund drive

**ANNIE BOON**  
DAILY NEWS-SUN

As the campaign advisory committee of the Sun City Community Fund/Valley of the Sun United Way partnership looks forward to its annual fund drive, members are reminded of the vast needs in the community, but also of the generosity that's synonymous with Sun Citizens.

The committee gathered for an informal breakfast Tuesday to discuss the importance of the upcoming campaign, as well as some strategies and possible obstacles.

The members are Karen Clark, vice president of The Harris Bank and former president of the Sun Health Foundation board; Heather Lyons, chairwoman of Inter-faith Community Care and a partner with Lischer, Batts and Lyons; Jan Pinter, director of Sun Health personal care services; Jane Freeman, local volunteer and member of the SCCF/VSUW board; Paul Luna, president of VSUW; Merl Waschler, chief operating officer of VSUW; Bob Root, former chair of the

Sun Health Corporation board; Jim Green, SCCF president; and advisory committee Chairman Jason Joseph, publisher of the Daily News-Sun.

"We have resources because the members here have chaired other social services boards. They are very active in the community," Green said. "They know what the needs are. With this knowledge, they can help direct funds to where they're needed most."

With a goal of raising \$215,000 last year, the campaign fell just short and raised about \$200,000 to directly support the health and human care needs of Sun City, Green said. These resources were invested in programs at seven SCCF agencies including Alzheimer's Association, Jewish family and children services, Olive Branch Senior Center, Sun Cities Area Transit, Sun Health personal care services, Volunteers for Hospice and SCCF personal needs program. The goal for this year's campaign will be set later this month.

The committee wondered if



**STEVE CHERNEK/DAILY NEWS-SUN**

Jason Joseph, publisher of the Daily News-Sun, shakes hands with Merl Waschler, chief operating officer of Valley of the Sun United Way, at a kickoff breakfast for the annual Sun City Community Fund/VSUW fund drive. The advisory committee gathered to discuss strategies for the campaign.

campaign dollars would fall short this year, as people have donated to relief efforts for last year's tsunami tragedy in Southeast Asia and this year's hurricane devastation.

"People have opened up their checkbooks and hearts in the last few months," Joseph said. "We may have to

work a little harder for the dollar, but I think we can do it."

The group agreed — needs have not lessened in Sun City, and donors will recognize that it's still imperative to give locally.

"Yes, people are tired having responded to the tsunami and hurricanes, but there is

an understanding of local needs," Luna said. "These are still needs and they're ongoing every day."

United Way-funded programs were accessed more than 2 million times by people age 55 and over. In 2004, the organization raised \$48 million to support the most critical health and human care needs across Maricopa County, including Sun City, said Mary Lou Venezuela, VSUW spokeswoman.

"I am very optimistic that we can surpass last year's campaign contributions. The fact that all dollars raised remain within our community has proven to be very beneficial for many of its recipients," Joseph said. "The generosity of our residents to help a neighbor in need has always been outstanding."

The campaign will begin later this month, and residents will receive a campaign letter and donation cards in the mail in the next few weeks. For information, call 602-631-4840. To learn about Valley of the Sun United Way, visit [www.vsuw.org](http://www.vsuw.org).



# United Way revs up annual SC drive

**ANNIE KARSTENS**  
DAILY NEWS-SUN

Get ready to give because the Sun City Community Fund/Valley of the Sun United Way kicked off its annual Sun City fund-raising campaign Wednesday and announced a goal of \$215,000.

For the first time, donations will be matched dollar for dollar, up to \$125,000, by the Sun City Community Fund Foundation, part of the Valley of the Sun United Way Endowment Fund. The matching program allows gifts to have double the power, said Jim Green, president of the SCCF.

"This is an exciting time in Sun City," Green said. "Each year, the annual campaign provides each of us with a unique opportunity to address our community's needs and that of our fellow neighbors."

The kickoff breakfast celebration, at Palmbrook Country Club, was attended by representatives of the seven local agencies funded in part by the Sun City Community Fund/Valley of the Sun United Way. The 2004 Campaign Chairman Hal DeKeyser, publisher of Northwest Valley Newspapers, announced the \$215,000 goal of the two-month campaign and urged the group go out, and help find the funds.

DeKeyser said he aims to reveal the heart of the Sun

City Community Fund/Valley of the Sun United Way in the Daily News-Sun by highlighting true stories of those in the community whose lives have been touched by the organization. Beyond the numbers and statistics, DeKeyser said, people will be able relate to the human aspect of overcoming adversity with help from the Sun City Community Fund/Valley of the Sun United Way and its countless volunteers.

"We are very fortunate to have such dedicated volunteers who care so much about Sun City," DeKeyser said. "Their tireless efforts help ensure that individuals in this community are able to receive support through various programs and services funded by the Sun City Community Fund and Valley of the Sun United Way Campaign."

With a \$215,000 goal last year, the campaign raised nearly \$300,000 to directly support the health and human care needs of Sun City. These resources were invested in programs at eight SCCF agencies including Alzheimer's Association, Jewish Family and Children Services, Olive Branch Senior Center, Sun Cities Area Transit, Sun Cities Information and Referral Service, Sun Health Personal Care Services, Volunteers for Hospice

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COMMUNITY FUND

and SCCF Personal Needs Program. This year, there are seven SCCF agencies due to the closing of the Sun Cities Information and Referral Service.

In 2003, Valley of the Sun United Way invested \$7.7 million in 89 programs benefiting seniors, many who were Sun City area residents. United Way-funded programs were accessed more than 2 million times by people age 55 and over. The organization also raised \$47 million to support the most critical health and human care needs across Maricopa County, including Sun City.

Residents will be receiving donation cards in the mail in the coming weeks. For more information on making a donation, call 602-631-4840. To learn more about Valley of the Sun United Way, visit [www.vsuw.org](http://www.vsuw.org).

## SUN CITY COMMUNITY FUND AGENCIES

### Alzheimer's Association

1028 E. McDowell Road  
Phoenix, AZ 85006  
602-528-0545

### Jewish Family and Children Services

4220 N. 20<sup>th</sup> Ave.  
Phoenix, AZ 85015  
602-279-7655

### Olive Branch Senior Center

10765 W. Peoria Ave.  
Sun City, AZ 85351  
974-6797

### Sun Cities Area Transit (SCAT)

9445 N. 99<sup>th</sup> Ave.  
Peoria, AZ 85345  
977-8363

### Sun Health Personal Care Services

10448 W. Coggins  
Sun City, AZ 85351  
974-7500

### Volunteers for Hospice

10404 W. Coggins Drive, Suite 110  
Sun City, AZ 85351  
583-4490

### SCCF Personal Care Needs Program

974-7500

**See FUND-RAISER, A5**

SUN CITIES INDEPENDENT

November 5, 2003

# Community Fund kicks off drive

## Mail campaign begins this week; goal is \$200,000

The Sun City Community Fund officially kicks off its annual fund drive this week with hopes of collecting \$200,000 to help area organizations and agencies.

A letter explaining the drive and a request for donations will be mailed to all Sun City residents. No telephone or door-to-door solicitations are made.

The goal of \$200,000 was announced last week at a breakfast event to kick off the 2003-04 campaign.

"There are so many people in need in our community and we need your help in reaching our goal," said Bret McKeand, chairman of this year's Sun City campaign.

The community fund, which partners with Valley of the Sun United Way, is operated entirely by Sun City volunteers and overseen by a volunteer board of local residents.

Organizations supported last year by Community Fund grants include the Olive Branch Senior Center, Sun Cities Area Transit, Jewish Family and Children's Services and Sun Health Personal Care Services.

Paul Luna, president of Valley of the Sun United Way, told those in attendance that "we have a challenging campaign ahead, both here in Sun City and throughout the Valley."

Mr. Luna encouraged those in attendance to urge their friends and neighbors to support the Community Fund.

"There are many Sun City residents in need of nutritious meals, transportation to medical appointments and much more," he said.

"The needs of the community are growing, and your help is not only needed but also greatly appreciated."

All donations to the Sun City Community Fund remain in Sun City to assist those organizations and agencies that provide services to Sun City residents.

*Editor's note: It is Independent Newspapers' policy to alert readers to any potential conflict of interest. Bret McKeand, chairman of this year's Community Fund drive, is also vice president of operations for Independent Newspapers and a former editor and publisher of the Sun Cities Independent.*

SUN CITIES INDEPENDENT

October 29, 2003



Staff photo

## Fund prepares for campaign

The Sun City Community Fund/Valley of the Sun United Way is preparing to kick off its 2003-04 fund campaign. Fund officials last week met with several of the local agencies that received assistance from the Community Fund thanks to donations made last year by residents. From left, front, Donna Ellertson, Sun Cities Information and Referral Service; Ellie Schwartzberg, Jewish Family and Children's Services; Ivy Wixson, Olive Branch Senior Center. Center row, from left, Jane Freeman, Sun City Community Fund; Rosie Bosch, Alzheimer's Association West Valley Resource Center; Jan Pinter, Sun Health Personal Care Services; Tom Profico, Sun Cities Area Transit. Back row, from left, Bret McKeand, chairman of this year's fund campaign; Jim Green, Community Fund president; Raoul Sada, Volunteers for Hospice; Tony Waskiewicz, Sun Cities Area Transit.

SUN CITY INDEPENDENT

DECEMBER 25, 2002

# United Way exceeds fund-raising goal

## Large anonymous donation puts campaign over the top

By **Mike Russo**  
Independent Newspapers

A sizable last-minute donation pushed the local United Way annual fund-raising effort over the top and resulted in the most successful campaign in recent memory, according to a United Way official.

"We received a donation of nearly \$100,000 from an anonymous donor," said Jim Green, president of the Sun

City Community Fund/Valley of the Sun United Way.

The almost six-figure contribution pushed the local campaign's fund-raising to \$342,259, or 124 percent of the organization's \$275,000 goal, and considerably higher than last year's effort — \$239,584.

"It was a very generous year this year in Sun City," said Andrew Ostrander, public relations director for the Val-

ley of the Sun United Way. "It appears to be the best performance in recent years."

"We are very excited, especially in a year when we thought individual giving would be down in our country," Mr. Green said. "We are fortunate that Sun City people want to look after their neighbors."

Mr. Ostrander attributed the success of the campaign to, "The Sun City Community

Fund people were more organized, and more committed, and has volunteers from other parts of the country who are accustomed to volunteering is helpful."

While the nearly \$100,000 donation was substantial and greatly appreciated, it was not the largest single donation ever received by the Sun City Community Fund/United Way.

"We have gotten gifts from estates in excess of

\$200,000," Mr. Green said.

The Sun City Community Fund Foundation has an endowment fund of approximately \$2 million, according to Mr. Green.

"That money has been placed with United Way," he said. "Interest from the endowment amounts to about \$79,000 annually. That is used as part of the annual campaign.

"People have been so generous with us, all the income from that (the endowment interest) helps Sun Citains," Mr. Green continued.

With the fund-raising completed, the next step is the distribution of the funds through grants.

"We are part of the elderly panel for United Way," Mr. Green said. "They will meet in March to discuss grant applications and will likely make a decision in April."

*Editor's note: It is the newspaper's policy to declare to our readers any potential conflict of interest. Bret McKend, publisher of the Independent, also served as honorary chairman of this year's Community Fund campaign.*

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THE ARIZONA REPUBLIC SATURDAY, DECEMBER 21, 2002

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# Sun City fund gets \$100,000 gift

By Nora Fascenelli  
The Arizona Republic

**SUN CITY** — A single gift of \$100,000 has helped the Sun City Community Fund, in partnership with the Valley of the Sun United Way, raise more than \$480,000.

“A family bequeathed \$100,000 to the Valley of the Sun United Way recently,” said Andrew Ostrander, public relations director. “We’re excited about the tremendous amount of the gift, and thankful for the generosity of the people here in

Sun City.”

The name of the family is being kept private, Ostrander said.

Valley of the Sun United Way teamed up this year with the Sun City Community Fund. United Way’s 2002 goal for Sun City was \$275,000, but the non-profit group raised \$342,000.

The money will go to 14 Sun City programs, including SCAT, the local transit system; the Sun City Information Referral Service; and the Sun City County Outreach Center, which is affiliated with the American Cancer Society.

“The entire allocation process is volunteer-driven,” Ostrander said. “The volunteers in Sun City decide which local agencies and programs will be funded, and how much they’ll receive.”

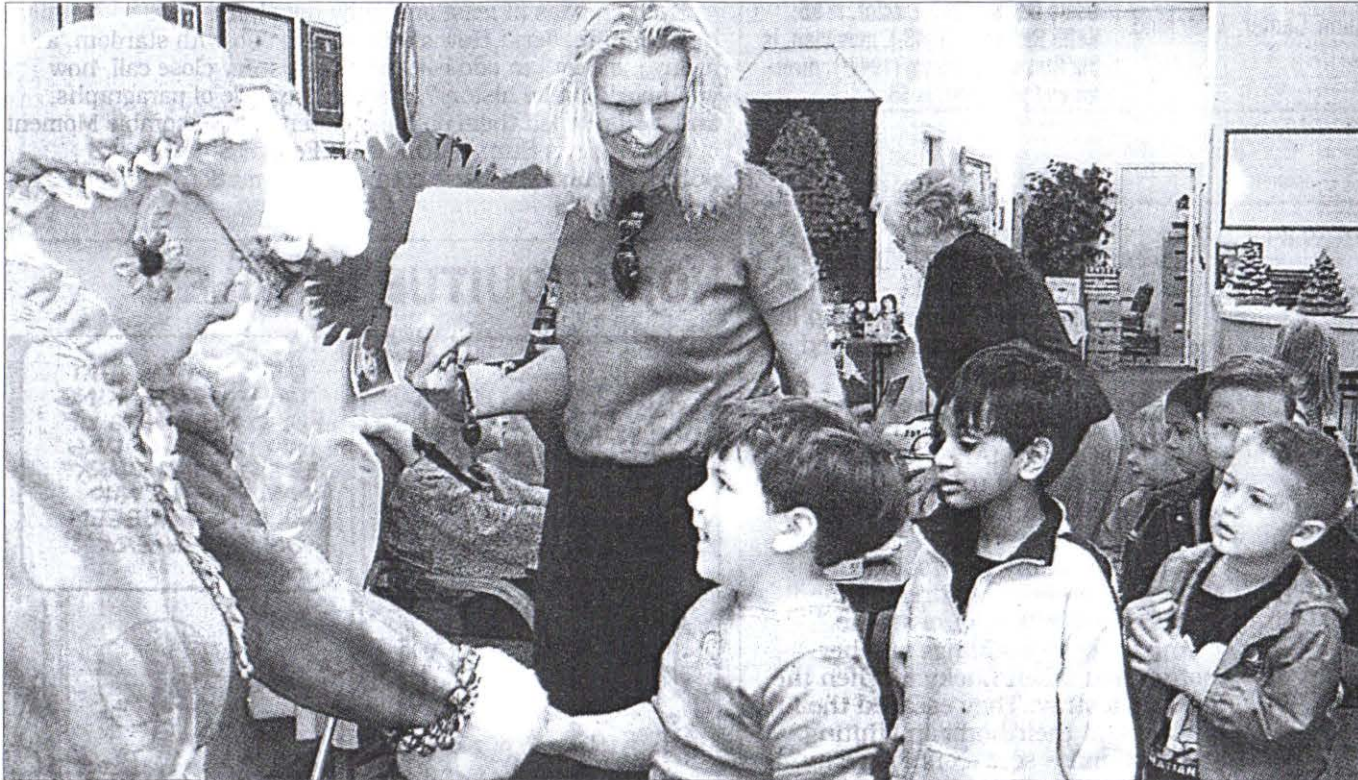
The Valley of the Sun United Way will announce its fund-raising goals for 2003 in March, along with a tentative allocation plan.

“It’s so encouraging to see how involved the people of Sun City are,” Ostrander said. “This is the season for giving, and there is certainly a great deal of generosity to be thankful for.”

DAILY NEWS-SUN

WEDNESDAY, DEC. 18, 2002

# Anonymous donor boosts Sun City Community Fund



JOY LAMBERT-SLAGOWSKI/DAILY NEWS-SUN

Santa and Mrs. Claus, aka Bert Briggs and Angie Pappas, greet children from the Sun Health Child Development Center at Boswell Memorial Hospital during a Christmas party at Sun Health Olive Branch Senior Center in Sun City, a recipient of United Way Sun City Community Fund allocations.

Valley of the Sun United Way &  
Sun City Community Fund



CHARLES WADE/DAILY NEWS-SUN

**OVER THE TOP:** 100  
grand lifts annual  
United Way campaign

**MICHAEL MARESH**  
DAILY NEWS-SUN

An anonymous donation of nearly \$100,000 helped the United Way Sun City Community Fund Drive shatter its 2002 goal of \$275,000 by collecting more than \$342,000.

Last year, a little more than \$239,000 was collected.

Andrew Ostrander, spokesman for United Way, said last year's total does not include nearly \$241,000 in United Way supplements to the Sun City Community Fund. No decision has been made as to whether supplements to this year's collection will be necessary.

**See FUND, A5**

OVER

## From A1

United Way Sun City Community Fund Drive President Jim Green attributes the large increase to a single donation of almost \$100,000.

"It's a very good figure for Sun City," Green said, adding all the funds go to the residents of the retirement community.

Although allocations have not been determined, eight agencies slated to receive funds are the Alzheimer's Association, American Cancer Society, Sun Cities Area Transit, Sun Cities Information and Referral Services, Sun Health's Olive Branch Senior Center, Sun Health Corp., Volunteers for Hospice

and the Personal Needs Committee.

The Personal Needs Committee, Green said, will receive \$25,000 to distribute to residents in need.

"All agencies have applied, but we do not know what they will get until March," Green said, adding that the Personal Needs Committee is a new program aimed at helping individuals financially, not agencies.

Green said part of the funds collected this year were endowments, with the community fund using the interest on them to add to the collections. The fund drive started in August and ran through the end of November, and Green said he was very

happy with this year's effort.

"I am thrilled to death," he said. "It points out people in Sun City want to take care of their neighbors. Sun City is filled with marvelous people."

Past fund President Jane Freeman praised the generosity of the community.

"I feel great. How could I feel anything less?" she said. "I am pleased. Sun City people usually come through."

SCAT Executive Director Tom Profico said the funds his agency receives help support the transit's late-night service.

This service, Green said, enables residents to use SCAT at night from Sun Health's Del Webb or Boswell memorial hospitals.

Green said residents taken to either hospital by ambulance could have the ambulance take them home, but the cost would be hundreds of dollars.

"It helps not only us, but many other organizations, too," Profico said. "The Sun City Community Fund through United Way helps local services for the many organizations that need them."

Ostrander said Sun City did particularly well this year, adding increases in donations usually occur, but not in such large amounts.

*Michael Maresh can be reached at 876-2513 or [mmaresh@aztrib.com](mailto:mmaresh@aztrib.com).*

An edition of the **East Valley Tribune** 50¢

MOLLIE J. HOPPE/DAILY NEWS-SUN

Jane Freeman joins in applause as the 2002 Sun City Community Fund/Valley of the Sun United Way Campaign kicks off Thursday during a breakfast at Palmbrook Country Club. Freeman and Jim Green are co-chairs for the drive.

## Community Fund, United Way drive toward \$275,000

JOHN SOKOLICH  
DAILY NEWS-SUN

If last year was any indication, the Valley of the Sun United Way should have no problem reaching its \$275,000 Sun City Community Fund goal.

The two organizations partnered last year to raise close to \$500,000, and were at it again Thursday morning.

Fund-raising coordinators met with donors who had given more than \$50 to the

fund at Palmbrook Country Club in Sun City Thursday for a kick-off fund-raising breakfast.

"The Sun City campaign kickoff was a huge success," said Andrew Ostrander, spokesman for the Valley of the Sun United Way. "It was clear there is a tremendous commitment in Sun City toward helping those in need."

Local agencies, such as the Olive Branch Senior

**See Fund-raiser, A6**

# Fund-raiser supports local nonprofits

From A1

Center, the Westside Food Bank, Sun Health Personal Care Services and Sun Cities Area Transit rely on Valley of the Sun United Way funding annually.

"There are many Sun City residents in need of nutritious meals, transportation to medical appointments, and much more," said Paul Luna, president of the Valley of the Sun United Way. "We are fortunate to have a wonderful group of passionate supporters at the Sun City Community Fund."

Last year was a transition year for the fund-raiser, marking the first time that the Sun City Community Fund teamed up with the United Way for fund raising. The transition proved successful, making the total the highest ever collected for the organization.

Nicole Magnuson, spokeswoman for the United Way, said the amount of money that came in last year was more than ever before because a portion of it came from supplements from the United Way.

The Sun City Community Fund joined the Valley of the Sun United Way four years ago to take advantage of its professional help in fund-raising — but didn't actually try the collection until last year.

According to Jim Green, president of the Sun City Community Fund, in the last

## Sun City Community Fund/Valley of the Sun United Way Campaign

The goal is to raise \$275,000. For more information or to donate, call 876-0178.



year or two, the United Way has done things to further improve the fund-raising — such as bringing on additional fund-raising managers — therefore allowing for such a big return.

The money goes to various Sun City organizations, such as the Sun Cities Community Outreach Center, the Sun Cities Community Outreach Center and the Sun Cities Information and Referral Services. As with all Sun City Community Fund fund-raisers, donors have the option to choose a specific category of help, such as children, health or the elderly.

For information about the community fund, call 602-631-4800.

John Sokolich can be reached at 876-2526 or [jsokolich@aztrib.com](mailto:jsokolich@aztrib.com).



## Sun City Community Fund distributes nearly \$500,000 to area charities

Fourteen programs serving residents in Sun City will receive nearly a half-million dollars thanks to recent grants announced by the Sun City Community Fund and Valley of the Sun United Way.

Jim Green, president of the Sun City Community Fund, last week announced that \$480,472 will be dispersed among the 14 programs and agencies.

"We are very thankful to the residents of Sun City for their continued support of our community," says Mr. Green.

"We have been providing vital services for the Sun City community for the past 30 years and now as part of Valley of the Sun United Way we are doing so in the most efficient and

effective manner."

Mr. Green expressed thanks to R.N. "Dick" Brown, Sun City Campaign 2001 chairman, for conducting a successful fundraising drive. Bret McKeand, publisher of Independent Newspapers, will head up the 2002 campaign.

All funding decisions for the upcoming year were made by a volunteer review panel consisting of representatives from Sun City.

Contributions were granted to the following non-profit agencies:

- Alzheimer's Association, \$110,031, for its family care consultation program, education and training and its telephone help line.

- American Cancer Society, \$15,000, for its Sun Cities outreach center.

- Sun Cities Area Transit, \$40,934 for SCAT's Dial-A-Ride system and \$7,500 specifically for SCAT's late-night ER return transportation.

- Sun Cities Information and Referral, \$17,500.

- Sun Health Corporation/Olive Branch Senior Center, \$22,000 for the congregate meal program; \$10,000 for the home-delivered meal program; \$20,000 for operation of the senior center; \$2,000 for the center's senior employment placement program and \$6,000 for the center's pantry program.

- Sun Health Corporation, \$45,000, for personal care services.

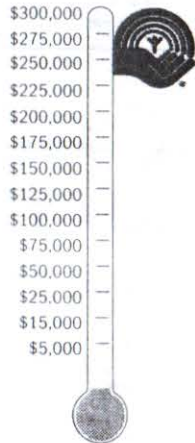
- Volunteers for Hospice, \$33,422, for hospice care and education.

Daily News-Sun • Friday, Oct. 23, 2001

# Sun City Community Fund/UW goal set at \$300,000

## Sun City Community Fund/Valley of the Sun United Way Campaign

The goal is to raise \$300,000. For more information or to donate, call 876-0178.



DAILY NEWS-SUN

### STAFF REPORT

The Sun City Community Fund/Valley of the Sun United Way kicked off its campaign Thursday night by setting a fund-raising goal of \$300,000.

Paul Luna, incoming president for the United Way, joined Jane Freeman, president of the community fund, and Dick Brown, retired president of Wells Fargo Sun Cities and honorary chairman for the campaign, at the event in Palmbrook Country Club, Sun City.

The Sun City Community Fund campaign supports the Alzheimer's Association, Arizona Chapter, American Red Cross, Jewish Family and Children's Services, Northwest Valley Regional Community Council, Olive Branch Senior Center, Sun Cities Area Transit, Sun Cities Information and Referral Service, Sun Cities Volunteer Placement Services, Sun Health Personal Care Service, Sun Sounds for Arizona, Volunteers for Hospice and Westside Food Bank.

The kickoff was sponsored by Wells Fargo. Also recognized for past support were Palmer Plumbing, Fred Curtis, Daily News-Sun, Sun City Independent and Sun Life Magazine.

Send contributions to Sun City Community Fund/United Way, 1515 Osborne Road, Phoenix, 85014, or call 876-0178 with your pledge.



JOY LAMBERT/DAILY NEWS-SUN

Kicking off the Sun City Community Fund/United Way campaign Thursday are from left, Paul Luna, incoming president of the Valley of the Sun United Way; Jane Freeman, president of the Sun City Community Fund; and Dick Brown, retired president of Wells Fargo Sun Cities and honorary chairman of the campaign.

**SUN CITIES INDEPENDENT**

SEPTEMBER 20-26, 2000

**Name to Know**

**Dick Brown**, president of Wells Fargo & Company in the Sun Cities, has been named chairman of the Sun City

Community Fund/Valley of the Sun United Way's 2000 annual campaign.

Valley of the Sun United Way



and the Sun City Community Fund merged in February. In June, the organization announced the investment of more than \$280,000 to 16 programs serving residents of Sun City.

Mr. Brown has been president of Norwest (now Wells Fargo) Bank's Sun Cities locations for the past six years. He has more than 34 years of banking experience.

He is a board member of the Sun Cities Symphony of the West Valley and vice president and board member of the Administration of Resources and Choices (Reverse Mortgage Program).

He is a former allocation panel volunteer for United Way, served as a board member for Los Vecinos Housing and was president of the Glendale Chamber of Commerce.

He and his wife live in Sun City Grand.

"We are very thankful to Dick Brown for his support," says Jane Freeman, chairman of the Community Fund's Board of Directors.

Daily News-Sun • Thursday, Oct. 19, 2000



JOY LAMBERT/DAILY NEWS-SUN

The 2000 Sun City Community Fund/United Way campaign kickoff Wednesday night at The Lakes Club features an ice sculpture commemorating the 75th anniversary of the Valley of the Sun United Way.

# Charity sets \$300,000 goal for 2000 campaign



JOY LAMBERT/DAILY NEWS-SUN

Dick and Genny Beck of Sun City check out the Wells Fargo wagon on display outside The Lakes Club for Wednesday's kickoff celebration for the 2000 Sun City Community Fund/United Way campaign.

## STAFF REPORT

Community leaders and United Way officials kicked off the 2000 Sun City Community Fund/United Way campaign Wednesday night, with a goal of \$300,000 in local contributions.

This year's campaign is headed by Dick Brown, vice president at Wells Fargo Bank in charge of Sun Cities-area offices, who brought along the Wells Fargo stagecoach to the kickoff at the Lakes Club.

Brown said he was honored to serve as this year's chairman.

In turn, he cited Monte Rice and Stan Rideley of Bob Brown Air Conditioning for their company's long-time support of the community charitable effort.

Recognition also went to Ken Meade, founder of Ken Meade Realty, another long-time Community Fund supporter.

Speakers included Jan Pinter of Sun Health Personal Care Services and Charles Ballit of Hospice Volunteers. Both work for agencies that are helped by local Community Fund dollars, and each briefly described the work their

agencies do in the community.

Brian Hassett, president of Valley of the Sun United Way, noted that as Sun City celebrates its 40th anniversary this year, United Way celebrates its 75th — as a giant ice sculpture with a carved "75" illustrated.

Sun City's Community Fund joined the Valley of the Sun United Way two years ago to take advantage of its professional help, but this is the first year the campaign was kicked off at a formal event in Sun City.

Letters seeking local contributions are slated to be mailed soon, Hassett said. Companies in the area also will be asked to sign up employees for the payroll-deduction plan.

As in prior years, Sun City residents may designate the specific local charities they'd like to see their dollars support, or they may choose a general category such as health, children, or the elderly.

Although the Sun City Community Fund has joined the United Way, the Sun City West Community Fund has not, and still runs its own separate fund-raising campaign.

# Sun City Community Fund joins United Way

By MARY L. CRIDER  
Staff writer

4-12-97

As of Thursday, when it joined forces with the Valley of the Sun United Way, the Sun City Community Fund has come full circle.

SCCF will, however, continue to fulfill its 31-year-old objective — supporting the agencies that fill human services needs in Sun City.

SCCF began in 1966 as a local alternative to giving to the Glendale United Way Fund. Its founders intended to keep Sun City donations in Sun City to help Sun City residents. Initially, SCCF funded four agencies: Sunshine Service, Visiting Nurse Service of Phoenix, Sun Valley Lodge and Northwest Hospital.

Now the fund supports 15 area human services agencies. But in the past few years, donations have dropped drastically. Its 1997 fund-raising campaign would determine the future of the fund, board President Jane Freeman said in January.

In 1996, following its annual fund-raising drive, SCCF was about \$100,000 short of the money it needed to meet funding requests. Since the Jan. 21 mail-out start of the 1997 fund-raising drive, area residents chipped in less than \$150,000 — far shy of the \$400,000 needed to meet funding requests.

"The SCCF Board of Directors added to the donations for a total of \$200,000 — only 50 percent of what is needed," Freeman said.

Those funds will be allocated at the board's June 24 meeting, she said.

By collaborating with United Way for a combined communitywide fund-raising effort this fall, SCCF will retain the best of both agencies. It will be able to tap United Way's community relations, fund-raising and fund-distributing resources, and it can continue to assure its donors that money donated to the fund will stay in Sun City to help Sun City residents, said Mary Lynn Ulch, director of Media Relations for Valley of the Sun United Way.

"We had a meeting with the age-

► See Group shifts, A5

## ■ From A1

ncies (funded by SCCF) yesterday, and told them they were all grandfathered into this program to work with United Way," Ulch said.

The human services agencies, Interfaith Services, American Red Cross, The Salvation Army, Sun Health Personal Care Services, Hospice Volunteer Services of the Sun Cities Area, Sun Cities Area Transit System, Sun City Library, Sun Cities Information & Referral Service, Olive Branch Senior Center, Jewish Family & Children's Service, Sun Cities Area Volunteer Placement Service, Westside Food Bank, Sun Sounds, Northwest Valley Regional Community Council and Sun City Community Fund Personal Needs Program, will be able to apply for SCCF funding through the United Way, or they can opt to go out on their own, Ulch said.

When prospective donors receive their annual United Way fund-raising forms in the fall, they can check any particular agency to which they want their money to go, Freeman said. Funds will be distributed as donors allocate, she said.

The primary advantage of the merger will be that officials of SCCF can focus their attention on application reviews, funding recommendations and program delivery for the community rather than day-to-day administration. Staff of the United Way organization will handle fund raising, mailings, accounting and, with its computerized system, distribution of checks.

As an added benefit, through the speakers bureau, Sun City area human services agencies will be able to spread the word about their agencies throughout the Valley, possibly stimulating even more support in the form of services from other human service agencies and funding, Ulch said.

Valley of the Sun United Way was established in 1925 as the Community Chest and has evolved through the merger of separate United Way organizations in Tempe, Scottsdale, Glendale, Chandler and Phoenix to more comprehensively serve the needs of all Valley residents. The organization raised more than \$30.3 million in 1996 and funds programs in 71 partner agencies. Also, approximately 200 local health and human services agencies benefit from designated gifts through the donor involvement program, a United Way press release stated.

May 11, 1997 Daily News-Sun, Sun City, Ariz.

# Sun City fund faces shortfall

By MARY L. CRIDER  
Staff writer

**Its never too late to help out  
the Sun City Community Fund.  
Donations can be sent to:  
SCCF  
P.O. Box 1355  
Sun City, AZ  
85372  
For information: 876-0178**

It's a dominoes kind of thing. Reduced contributions to the Sun City Community Fund will be passed along as reduced grant amounts to the 15 area agencies it supports. In turn, some of those agencies, dependent on SCCF monies, may be forced to reduce services to area residents.

Since the Jan. 21 mail-out start of the annual SCCF fund-raising drive, area residents have chipped in about \$135,000, board member Mary Callahan said Friday. But SCCF needs about \$400,000 to meet the 15 funding requests it has received.

"They're certainly not going to be able to get what they requested," Callahan said.

The 31-year-old fund does receive some money in the form of endowments, she said, adding, "but that is not a huge amount."

SCCF began in 1966 as a local alternative to giving to the Glendale United Way Fund and initially funded four agencies working in Sun City to ease needs primarily associated with aging: Sunshine Service, Visiting Nurse Service of Phoenix, Sun Valley Lodge and Northwest Hospital. True to its founders' intent,

donated money stays in Sun City to help Sun City residents.

Donations continue to trickle in at the rate of about eight or 10 a week, Callahan said, and board members are happy to receive them.

"Every little bit is appreciated," said Callahan, who picks up donations twice a week.

The committee in charge of divvying up this year's donations will meet to do so within the next week or so, she said. But the funding future doesn't look too bright for the services that drew up fiscal 1998 budgets based on expected SCCF grants.

"We'll probably have to cut everybody in half," Callahan said.

The SCCF board faced about a \$100,000 shortfall following its 1996 fund-raising drive. Theorizing that donations had dropped because

SCCF was competing with other fall fund-raising drives, board members changed the timing of the 1997 drive, hoping to catch potential donors in a less tapped-out mood.

If future donations are low, Callahan said, the board may be forced to cut funding entirely to agencies that conduct separate fund-raising drives in order to concentrate on human services providers like the SCCF's Personal Needs Program and smaller groups that depend solely on SCCF grants.

The funding dilemma will only grow, board members worry.

"The city's growing. It's much bigger than it used to be when we started this. And the population is aging, and that creates additional problems for us," Callahan said.

There are little ways in which people who can afford it can help the human services agencies that help them, such as paying SCAT Dial-A-Ride a full share of the cost of transporting them or paying what the lunch is worth at Olive Branch Senior Center, rather than the nominal donation Center staff request.

And, of course, its never too late to help out by donating to SCCF, PO Box 1355, Sun City, AZ 85372. For information, call 876-0178.



Agencies funded by the Sun City Community Fund are: Sun Cities Area Interfaith Services; American Red Cross; The Salvation Army; Sun Health Personal Care Services; Hospice Volunteer Services of the Sun Cities Area; Sun Cities Area Transit System; Sun City Library; Sun Cities Information & Referral Service; Olive Branch Senior Center; Jewish Family & Children's Service; Sun Cities Area Volunteer Placement Service; Westside Food Bank; Sun Sounds; Northwest Valley Regional Community Council and Sun City Community Fund Personal Needs Program.

Donated money stays in Sun City to help Sun City residents.

• JUNE 18-24, 1997 •



**Jane Freeman**/President of Community Fund says all funds will stay in Sun City.

# Community Fund joins forces with United Way

## Valley-wide group to assist Sun City organization with annual fund-raising efforts

The Sun City Community Fund will for the first time ever join forces with a Valley-wide agency in conducting its annual fund-raising campaign.

Community Fund officials last week announced plans to join forces with Valley of the Sun United Way in conducting its annual campaign.

According to Jane Freeman, president of the

Community Fund, the move will allow the Community Fund to take advantage of the United Way's expertise and management skills. All money raised in Sun City, she stresses, will remain in the community.

"We wanted to make certain that what we've been doing in Sun City continues," she says.

"Under this new agreement with United Way, we think that together we'll be more efficient and be able to help even more people in need here in Sun City."

For more than 30 years, the Sun City Community

Fund has been providing funds to agencies that serve local residents, as well as helping those individuals facing serious financial hardships.

A drop in contributions, coupled with an increase in requests for grants, has forced the Community Fund to cut back on donations to area agencies.

Valley of the Sun United Way operates in much the same manner as the Community Fund, but its focus is on assisting agencies Valleywide.

Established in 1925 as the Community Chest, the

See ■ FUND, Page 3

organization has evolved through the merger of separate United Way organizations in Tempe, Scottsdale, Glendale, Chandler and Phoenix.

Officials say the key advantage to the new merger will be that the Sun City Community Fund can now focus their attention on funding recommendations and program delivery — rather than day-to-day administration.

The Valley of the Sun United Way will be responsible for fund-raising and administrative duties.

"We're an organization of donors and volunteers concerned about the whole Valley and the Sun City community is a welcome addition to the communities we represent," says Brian Hassett, president of Valley of the Sun United Way.

"The consolidation of duplicate functions will allow the Community Fund to take advantage of the experienced professional staff of United Way in areas of fund raising, marketing, administration and distribution of funds."

The Community Fund will continue to review requests for funds from nonprofit agencies for funding and will distribute funds to individuals in Sun City who are in need of personal assistance.

"The character of the Sun City Community Fund will be maintained and money raised in Sun City will remain in Sun City," says Hassett.

Oct. 25, 1995

# Appeal widens

## Sun City Community Fund seeks businesses' support

By J.J. McCORMACK  
Senior staff writer

SUN CITY — Nancy Gilkeson knocked lightly on the wooden podium for fear her public expression of optimism about the 30th annual Sun City Community Fund drive would jinx the campaign.

Gilkeson, president of the community fund board of directors, made the superstitious gesture in an address to the board during an anniversary luncheon Tuesday in the Lakes Club. It came after she commented that she was pleased with a treasurer's report showing an annual mailing to Sun City households had netted nearly \$85,000 for the community fund in the first three weeks.

That's about a quarter of the way

to a 1996 fund-raising goal of \$350,000.

Board members, including honorary campaign chairman Ken Meade, said they're determined to reach the goal this year. If they do, it will be the first time in six years.

Gilkeson said she spent much of the summer exploring supplemental funding sources such as charitable foundations. Her efforts yielded mixed results. Some foundations politely declined the request for help, others including the Del Webb Corp. and Fry's Food Stores sent checks, while others invited the community fund to submit grant applications again next year.

The community fund fell far short  
▶ See Fund fills, A5

### ■ From A1

of the \$350,000 mark last year and had to cut funding for at least two of the 16 community-service organizations it supports year after year. Those organizations include the Olive Branch Senior Center, the Salvation Army, Sun Cities Area Transit System and Westside Food Bank.

In addition to administering an annual grant program to non-profit agencies serving Sun City, community fund volunteers administer a "Personal Needs Program," which supplies emergency financial assistance to Sun City residents in need.

Florence Jerousek, chairman of the committee that oversees the program, said cash gifts were made to 26 people during the summer months for emergencies ranging from delinquent electric bills to air-conditioning repairs and nursing home admission fees.

"It's been a very rough summer," Jerousek, a retired social worker, said in a report to the board. "We have

worked all summer long and we're glad to do it."

Personal needs program volunteers were busier this summer than last, Jerousek said, possibly because of the extreme heat or because more people are aware that emergency help is available from the community fund. The program's 1995 budget was set at \$40,000, but more money is available to provide for individual needs through the holidays, she said.

"The personal needs program is a No. 1 priority with us," Jerousek said.

Community fund board members talked during the anniversary luncheon about how the personal needs program is not well known in the community. But then neither is the extent of individual suffering.

"There are all kinds of needs here that people driving down the street don't even know about," said Meade, president of Ken Meade Realty.

"If you're playing golf five days a week, it's not a problem. But beneath the surface,

there are a lot of problems."

One man who turned to community fund for help this summer was at risk of having his electricity shut off for non-payment of his bills. The man was living on a fixed income and had medical and family problems that exhausted his savings.

As honorary chairman of the community fund campaign this year, Meade said he will oversee a direct appeal to businesses.

"Businesses have an obligation, like myself, to help support these functions in the community," he said.

"We want to get the message out that if you live in Scottsdale and run a business here, you ought to put something back into the pot."

Appeals for contributions to the community fund were mailed to every Sun City household and group retirement center on Oct. 5. A separate mailing to businesses was scheduled to begin within two weeks.

For information about the community fund or to schedule a speaker, call 876-0178.

OVER)



# SC Community Fund fails to top 1994-95 campaign goal

Organizers say the number of contributors remains stable, but size of donations is down

By **LLOYD D. BROWN**  
Sun Cities Independent

For the second year in a row the Sun City Community Fund will not reach its \$300,000 fund-raising goal.

But Nancy Gilkeson, the group's president and fund-raising campaign chairman, says the \$222,000 collected so far this year was not a sign that people were not contributing.

"I think it's indicative of the times," Ms. Gilkeson says. "We're getting just as many givers, just not as many dollars."

Ms. Gilkeson feels uncertainty about federal Medicare spending, and an increasing number of worthy causes are cutting into Sun City residents' ability to donate.

"People are pulled too many ways," Ms. Gilkeson says.

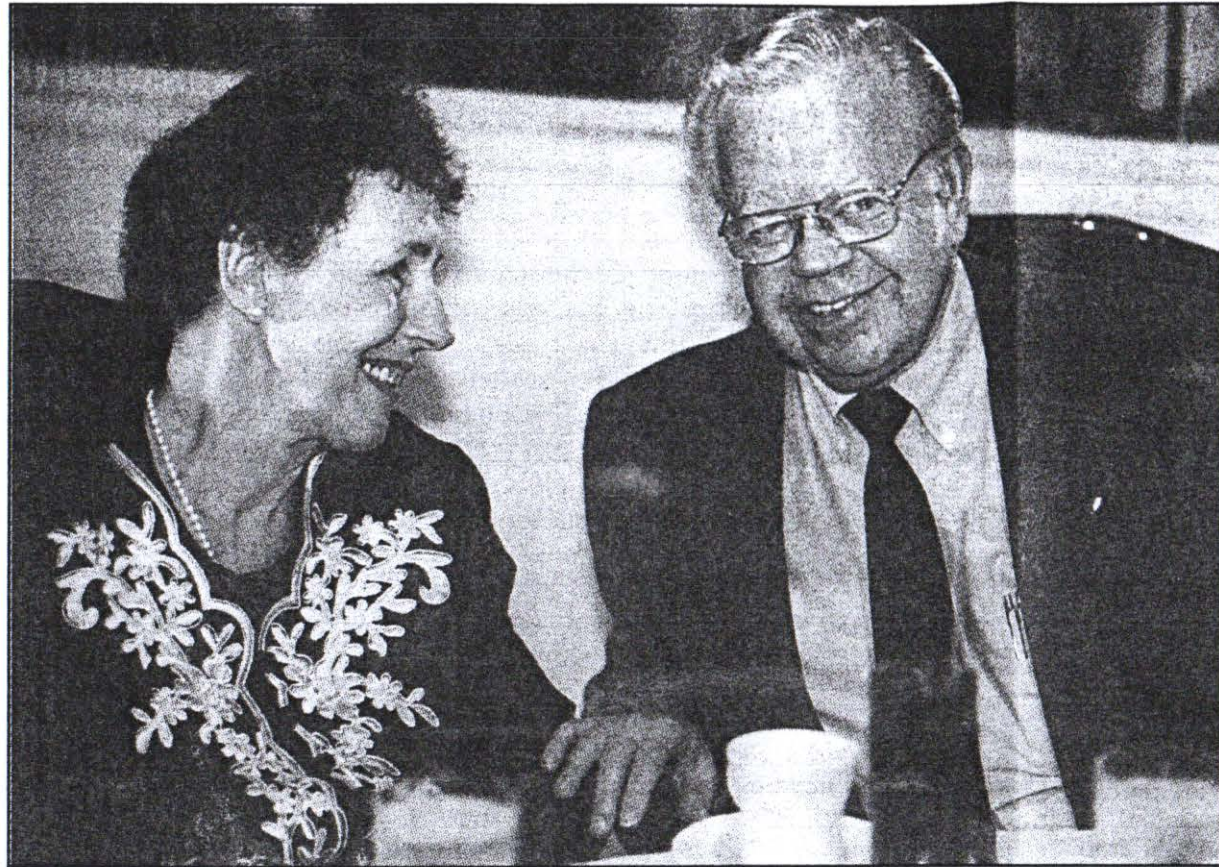
In 1994, the fund goal also was \$300,000, but the group only collected about \$265,000. Using income from the Sun City Community Fund Foundation, the organization's 23-member board of directors last year gave \$386,000 to 16 local agencies and \$36,000 to needy Sun City residents.

"The idea has always been to aim high," Ms. Gilkeson says of the \$300,000 target.

The board is reviewing agency requests of more than \$400,000 and should award its yearly grants by the end of June.

The community fund started in 1966 and will begin its 30th campaign in September.

Nancy Gilkeson,  
president of the  
Sun City  
Community  
Fund, visits with  
Ken Meade,  
honorary  
chairman of the  
fund's 30th  
anniversary  
campaign,  
during a  
luncheon at the  
Lakes Club  
Tuesday.



Steve Cherek/Daily News-Sun

SUN CITIES INDEPENDENT — DECEMBER 9-15, 1998

# Season of sharing

## Sun City Community Fund could use financial support

**I**n recent days the local media has announced that the Valley of the Sun United Way had not only met its fund-raising goal for 1998, but had exceeded that goal by over 14 percent. We of the Sun City Community Fund, which is affiliated with the United Way, offer our congratulations on the occasion of this successful venture.

We do so, however, with mixed emotions because, to date, the results of our own fund-raising campaign has been disappointing. At last report, only \$118,000 in pledges and contributions had been received. Our goal is \$200,000. Even more disappointing is the fact that just four businesses in all of Sun City have made a contribution.

There may be many people in the community who see no need for supporting the Sun City Community Fund. This is unfortunate because for the past 32 years our local Community Fund has been a primary source of funding for a number of Sun City organizations that in turn serve the people of this community. Every dollar that comes into our organization stays in Sun City



and that money is used exclusively to benefit the residents of Sun City.

In 1998, there were 12 such organizations that received funding from the local Community Fund, and it is hoped and anticipated that we will be able to help those same organizations in 1999.

However, with the present level of response to our campaign, it may be necessary to make some substantial reductions in our support program. The people who will suffer from such reductions are the people of Sun City.

Please remember, this is YOUR Community Fund. If it succeeds then everyone in Sun City benefits from that success. If it fails, we all will experience the consequences of that failure.

This is a plea for all of us to pull together. If you have not yet made your contribution to the Sun City Community Fund, please do so by mailing your check to: Sun City Community Fund/United Way, 1550 E. Osborne Road, Phoenix, AZ 85014-5346.

If you have any questions, please call us at 974-5377.

Thank you, and we look forward to hearing from you because we do care for our community and its people.

JANE FREEMAN  
PRESIDENT  
DOUGLAS P. WRIGHT  
CHAIRMAN

JUNE 21-27, 2000

SUN CITIES INDEPENDENT

## Sun City organizations profit from United Way donations

The Valley of the Sun United Way and the Sun City Community Fund (SCCF) last week announced the investment of more than \$280,000 with 16 not-for-profit organizations serving the residents of Sun City for the upcoming fiscal year, beginning July 1.

"We are very thankful to the residents of Sun City for their continued support of our community," said Jane Freeman, chairman of the SCCF board of directors. "Through our recent merger with Valley of the Sun United Way, we will be able to provide for our community in the most efficient and effective manner."

The total distribution to the 16 human care agencies totals

\$281,148, an increase of \$39,544 over the 1999 funding level.

All funding decisions for the upcoming year were made by a volunteer review panel staffed by Sun City residents. Valley of the Sun United Way and SCCF officially merged in February, after maintaining a partnership for three years. The new organization will enable the Sun City Community Fund to draw upon the administrative, managerial, fund-raising and marketing expertise of Valley of the Sun United Way while maintaining the high standards and personal touch that Sun City residents have come to expect.

The following investments in non-profit agencies, including the

benefiting program, were made:

The Alzheimer's Association: Sun City Alzheimer's Connection Program, \$19,375; American Red Cross: Special Transportation for the Elderly, \$6,000; Jewish Family & Children's Service: Sun City Geriatric Counseling Program, \$8,000; Northwest Valley Regional Community Council: Wake-Up/Tuck-In, \$37,000; Olive Branch Senior Center: Senior Employment Placement Program, \$2,000; Olive Branch Senior Center: Multi-Service Senior Center Operations; \$20,000; Olive Branch Senior Center: Home Delivered Meal Program, \$10,000; Olive Branch Senior Center: Pantry Program, \$6,000; Olive Branch Senior

Center: Congregate Meal Program, \$22,000; Sun Cities Area Transit System, Inc.: SCAT Dial-A-Ride, \$40,000; Sun Cities Information and Referral Service, Inc.: Sun Cities Information and Referral Service, Inc., \$18,000; Sun Cities Volunteer Placement Services, Inc.: Volunteer Placement Services, \$10,000; Sun Health Personal Care Services: Sun Health Personal Care Services, \$31,200; Sun Sounds Radio Reading Service: Sun Sounds Outreach & Service/ Sun City, \$13,500; Volunteers for Hospice: Hospice Care and Philosophy Education, \$35,073; Westside Food Bank: Sun City Food Distribution, \$3,000.

# Charity partners cement merger

**IT'S OFFICIAL:** Sun City Community Fund, Valley United Way make union formal through vote

**KATE FLEITAS**  
DAILY NEWS-SUN

After three years of informal partnership, members of the Sun City Community Fund voted to formalize a merger with Valley of the Sun United Way.

Three of the fund's 1,000 plus donors joined the community fund's board of directors and representatives of the Valley of the Sun United Way Tuesday for the vote. The merger was approved earlier by the board of directors of the Community Fund Foundation.

The foundation was created in 1990 to receive bequests and large contributions from the community. The community fund distributes the money to a number of agencies in Sun City.

Only one of the fund donors, Eugene Wright, opposed the merger. Wright, who has worked with the fund's and foundation's boards for the past 17 years, said he opposed the board's decision to transfer the Sun City Community Fund Foundation's \$2 million plus assets to the Valley of the Sun United Way.

"Why in the world should we be stripped of our reserve which we used so effectively for the past 10 years?" he asked.

Sun City Community Fund board member Doug Wright (no relation) asked for Eugene Wright to be silenced. He said the board had already listened to his concerns at previous meetings.

"It's a done deal. All that's being asked for is for the members of our fund to vote to consummate the merger," he said.

Sun City Community Fund Chairwoman Jane Freeman said the partnership was not a snap decision.

"We've been studying it for three years," she said. "We've been slowly feeling our way along and working with the United Way."

Brian Hassett, president of the Valley of the Sun United Way, said the

community fund has seen a "modest uptick" since joining forces with the local United Way. He said the merger would continue to bring in more money for Sun City agencies.

"It will be an efficient and effective vehicle for people who want to make charitable contributions to the less fortunate," Hassett said.

The Valley's United Way has entered into similar partnerships in Scottsdale, Tempe, Glendale and Chandler. Mesa United Way severed ties with the Valley of the Sun United Way in November 1999 after a seven-year partnership.

Other key elements of the agreement include:

- A Sun City Community Fund Advisory Committee will be established to carry out the activities of the current Sun City Community Fund Board of Directors. Members of the current board will be members of this advisory committee.

- A Sun City Community Fund Foundation Advisory Committee will be established to carry out the activities of the Sun City Community Fund Foundation Committee. Members of the current Sun City Community Fund Foundation Committee will be members of this advisory committee. Mike Sullivan of Harris Trust, the person who managed funds for the foundation, will oversee administration of the "donor advised fund."

- A Sun City Community Fund Executive Committee will be established to oversee the activities of the two advisory committees. The committee will act as a liaison to the Valley of the Sun United Way regarding its activities in Sun City.

- The Valley of the Sun United Way will have the authority to make charges to the fund for expenses incurred in the administration of the fund.

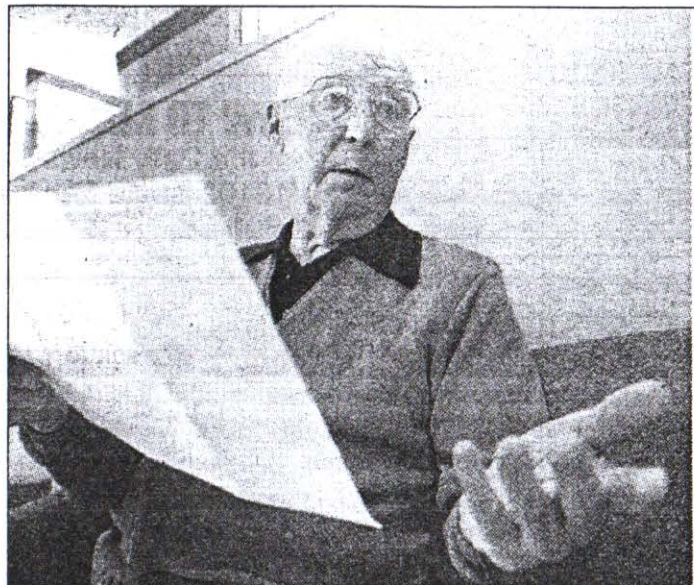
- The United Way will assume responsibility for all fund-raising and marketing efforts in Sun City.

- Sun City agencies will continue to be funded by the Sun City Community Fund. They will also become a "funded partner" of the United Way, which means they will have access to more United Way dollars.

0227

# SC Community Fund mulls merger

Eugene Wright, who served as chair of the Sun City Community Fund's Distribution Committee from 1992 to 1998 and is currently a member of the committee, said he supports the merger of the fund with the United Way, but feels uneasy about transferring the assets of the foundation.



MOLLIE J. HOPPES/DAILY NEWS-SUN

**BENEFITS:** Union with United Way will give local organization added dollars and more clout, leaders say

KATE FLEITAS  
DAILY NEWS-SUN

Charitable dollars contributed to the Sun City Community Fund may soon be pumped into the larger pool of money controlled by the Valley of the Sun United Way.

Donors will vote on merging the fund with the Valley of the Sun United Way at 2 p.m. Tuesday at the Lions Foundation Building, 9451 N. 99th Ave. in Sun City.

As part of the agreement, the Sun City Community Fund Foundation will transfer its estimated \$2 million in assets to the Valley of the Sun United Way. The

property will be held as a separate fund — the Sun City Community Fund — and will be distributed as directed by the Sun City Community Fund Foundation Committee, according to a final draft of the agreement obtained by the *Daily News-Sun*.

Other key elements of the agreement include:

- A Sun City Community Fund Advisory Committee will be established to carry out the activities of the current Sun City Community Fund Board of Directors. Members of the current board will be members of this advisory committee.

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- The Valley of the Sun United

See Leaders tout, A5

## From A1

Way will have the authority to make charges to the fund for expenses incurred in the administration of the fund.

- The United Way will assume responsibility for all fund-raising and marketing efforts in Sun City.

- Sun City agencies will continue to be funded by the Sun City Community Fund. They will also become a "funded partner" of the United Way, which means they will have access to more United Way dollars.

Both Jane Freeman, chairwoman of the Sun City

Community Fund, and Jim Green, chairman of the Sun City Community Foundation, said they support the proposed merger with United Way.

"We get two great things," Green said. "Professionals, who can increase the amount of contributions, and agencies, who get Sun City Community Fund money, will become funded partners with the United Way. They won't have to go through the hoops other people do to get other money available through the United Way."

Freeman said the merger will only be beneficial to Sun City

"They (Valley of the Sun United Way) will take over fund-raising campaigns, correspondence, mailings and filing with the IRS for donations over \$250," she said.

But not everyone feels comfortable about the merger.

Eugene Wright, who served as chairman of the Sun City Community Fund's Distribution Committee from 1992 to 1998 and is currently a member of the committee, said he supports the merger of the fund with the United Way, but feels uneasy about transferring the assets of the foundation.

"I feel very uncomfortable. The money is out of the control

of the Sun City Community Fund Foundation. In order to get that money back into the program, Sun City people have to apply to the Valley of the Sun United Way and then they return it to us," he said. "It seems to be a duplication of effort and a waste of time."

Even though the agreement gives the community the responsibility of directing the distribution of funds, Wright said he still has reservations about the community's access to the funds.

"They (Valley of the Sun United Way) still have the money and money equals control," he said.



**E.B. McGOVERN/DAILY NEWS-SUN**

Jane Freeman listens to Brian Hasset, United Way, while he addresses concerns about the Sun City Community Fund's merger with the Valley of the Sun United Way at Tuesday's meeting at the Lions Foundation Building.

# SC Community Fund, United Way to merge Services to local community should not be affected

By **JULIE RIDDLE**  
Independent Newspapers

After three years, Valley of the Sun United Way and the Sun City Community Fund have made their partnership official, as representatives from both organizations approved a merger Feb. 29.

The new organization, which will blend both the Sun City Community Fund and Sun City Community Fund Foundation, will now enable both to make use of administrative, managerial, fund-raising and mar-

keting knowledge of the United Way, while maintaining the organization's original purpose and committees.

A new committee known as the Sun City Community Fund Executive Committee, composed of chairmen from the Community Fund and Community Fund Foundation, as well as a Valley of the Sun representative, has now been formed to coordinate the activities of both advisory committees.

See ■ **MERGER**, Page 5

## ■ **MERGER**

Jane Freeman, Sun City Community Fund president, stressed the balance of power will remain with the citizens.

"The same services will be made available to residents under the new organizational structure," she said. "Merging with Valley of the Sun United Way gives us the opportunity to generate more funding and support for our existing programs, which is a benefit to our community. We are excited about this new opportunity."

Merl Waschler, Valley of the Sun United Way senior vice president of finance and administration, said maintaining the original Community Fund, while at the same time increasing its resources, has been the goal.

"The important issue has been in developing a merger that preserves autonomy," he said. "Hopefully we'll have the resources to help it grow and run more efficiently, with a larger pool of money." Mr. Waschler also said the merger will help keep overall costs down.

Sun City Committee Fund Foundation committee member Bob Root said the merger is a positive one.

"We will have potentially more resources with less to manage," he said. Valley of the Sun United Way will now assume responsibility for all fund-raising and marketing efforts in Sun City, and provide staff and volunteers in order to retain current donors and attract new ones.

The Sun City Community Fund will continue to invest in local agencies (now known as "funded partners") including the Olive Branch Senior Center, Sun Cities Area Transit System, Sun Health Personal Care Services, Hospice Volunteer Services, and others.



September 29, 1999



Sun City West Community Fund board members Donald Block and Betty Bone present a \$22,000 donation to Sun Cities Area Transit president Jim Lackey and Tom Profico, SCAT executive director.

Photo by TOM BARRY  
Independent Newspapers

## Sun City West Community Fund awards \$22,000 grant to SCAT

### Funds will subsidize fare revenue

At its September board meeting, the Sun City West Community Fund approved a \$22,000 grant to the Sun Cities Area Transit system to help subsidize fare revenue for Sun City West residents.

Founded in 1982, SCAT provides low-cost transportation services to residents of the Sun Cities and Youngtown.

"Sun City West residents make up seventeen percent of SCAT's ridership. More than eleven thousand trips were taken by our residents last year," said Betty Bone, chairperson of the Community Fund's Grants Committee.

She noted the \$2.50 per trip fare falls far short of the actual cost of providing the service, which she said is essential to many Sun City West residents as well as residents in other communities.

"These funds will be used to cover fares for those Sun City West residents with financial need and also to provide signage for a new van," Mrs. Bone added.

The Sun City West Community Fund is a volunteer organization whose primary objective is providing financial assistance to those residents who are experiencing temporary financial hardship. In addition, available funds are used to provide grants to organizations that provide social services to local residents or to clubs and organizations in which Sun City West residents participate.

Persons who require financial assistance due to unexpected difficulties or those who may know of someone in need may call the fund's hotline, 546-1122. All calls and information given are kept strictly confidential.

# Sun City causes to benefit from United Way

**By Douglas P. Wright**

The Valley of the Sun United Way/Sun City Community Fund is in the midst of its annual fund-raising campaign.

In past years, the letter to Sun City residents for this campaign has come from the Sun City Community Fund. This year, the letter has originated with the Valley of the Sun United Way. Because of this, it is possible that many Sun City residents are concerned that money sent by them to the Valley of the Sun United Way will not be returned to Sun City for the support of individuals and organizations in Sun City.

As a member of the Board of Directors of the Sun City Community Fund, I want to assure all residents of Sun City that their support of the Valley of the Sun United Way is indeed support of the people and organizations of Sun City. In fact, organizations such as the Olive Branch Senior Center, SCAT, the Community Council, Westside Food Bank and many others are guaranteed that they will receive at least as much support, and possibly even more, than in past years.

In addition, through the Sun City Community Fund Foundation, the work of the Personal Needs Committee will be continued in perpetuity. This means that countless numbers of individuals who experience unexpected emergency needs will continue to receive assistance.

With this in mind, we of the Sun City Community Fund urge all residents of Sun City to give their heartfelt support to the work of the Valley of the Sun United Way. What you give will be returned to you.

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Douglas P. Wright is chairman of the Community Relations Committee Board of Directors for the Sun City Community Fund. The views expressed are those of the author.

*As a member of the Board of Directors of the Sun City Community Fund, I want to assure all residents of Sun City that their support of the Valley of the Sun United Way is indeed support of the people and organizations of Sun City.*

**Douglas P. Wright**

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## Every dollar stays here in Sun City

Recently, the Sun City Community Fund, working in cooperation with the United Way, has completed its campaign for funding its projects for the coming year of 1998. The response to this campaign by the residents of Sun City has been most gratifying and the board of directors of the Community Fund wishes to express its appreciation to all those who have been so generous in their support of our endeavors.

What you have done through your support means that countless numbers of people in Sun City, who have very special needs, will continue to have those needs met. The work of the Community Fund is ongoing throughout the entire year and through the agencies that it supports many lives are touched in a very special way.

This year, for the first time, our campaign has been a joint venture with the United Way and the experience has been most positive. The United Way has contributed resources that have never before been available, and in turn you local Sun City Community Fund has been able to bring to the United Way some helpful and beneficial insights.

We do wish to emphasize that though we are now working together with the United Way, every dollar that is contributed by Sun City residents remains in Sun City to help fund our local agencies that in turn bring aid and comfort to local Sun City residents.

Again, we wish to thank all those in Sun City who have supported us in this special way and we look forward to increasing numbers of individuals who will join us in this most worthwhile endeavor.

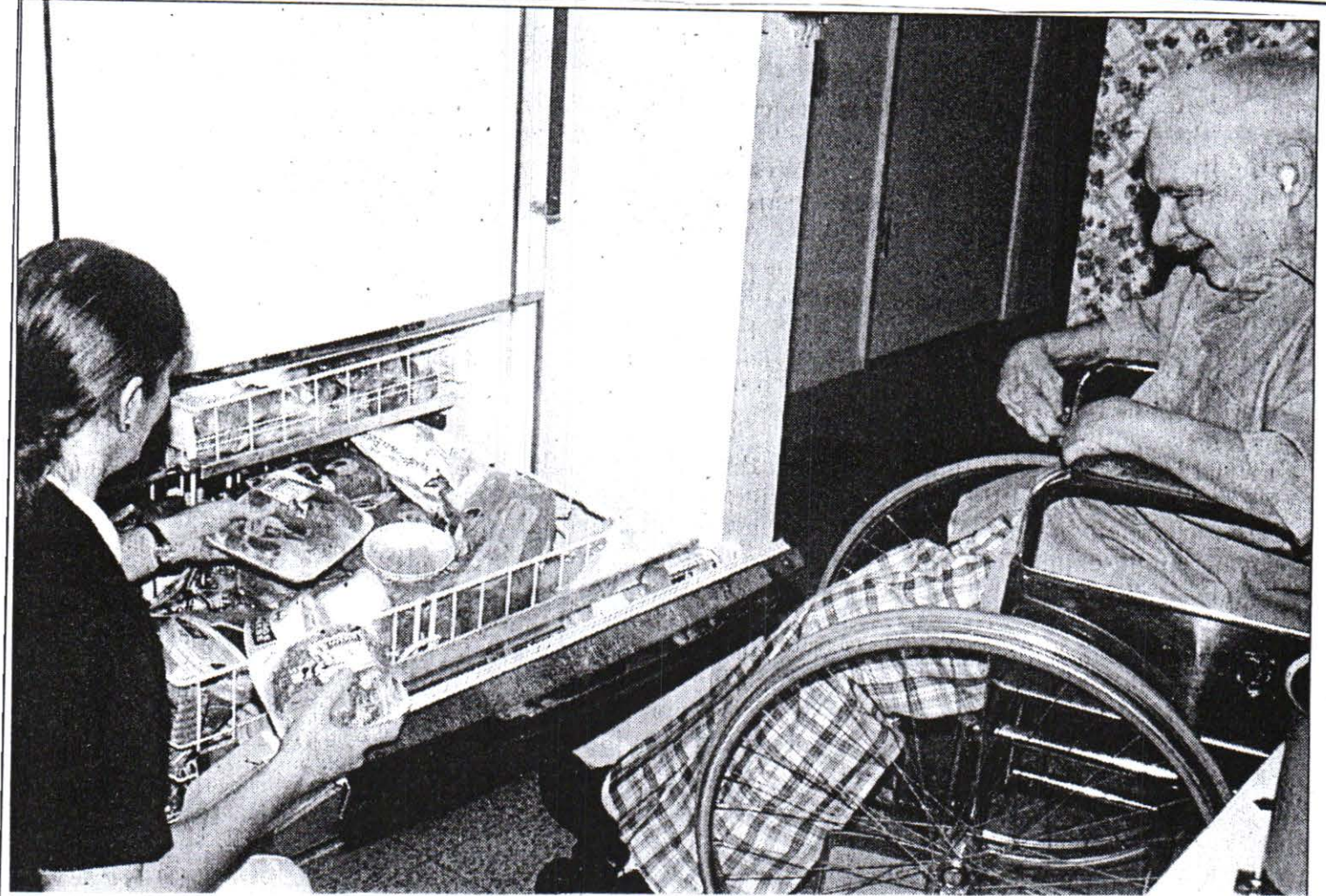
**Jane Freeman**  
President

Sun City Community Fund

# Community fund makes difference

Daily News-Sun

Sat., Feb 1., and Sun., Feb. 2, 1997



Companion home services provided by Sun Health Personal Care Services helps clients remain independent in their own homes.

## Agency banks on contributions to aid elderly

Second in a series  
By MARY L. CRIDER  
Staff writer

About 7 percent of Sun Health Personal Care Services clients receive services allowing them to remain independent in their homes, at least in part from money the agency receives from Sun City Community Fund.

"And that seems about right," said Jan Pinter, Personal Care Services director, as she flipped through the findings of a recent Sun Health Community Health Assessment survey.

She noted that "about 6 percent of folks said they were having trouble meeting their health-care needs and 6.2 percent did not have health insurance coverage, which tells me they can't afford it. And 6.6 percent had difficulty getting in to see a physician, which tells me they're falling through the cracks somehow and have lost the ability to access all the wonderful services in the Sun City area. Just under one-fourth of residents reported being limited in some way.

"It's these folks the fund will help, by paying for a R.N. (registered nurse) to manage their care through case management supervision," Pinter said.

Personal Care Services provides Companion Services/household management (non-hands-on care like house cleaning, cooking and shopping), assistance with activities of daily living (dressing, bathing, etc.) and case management by an R.N. The agency handles an average daily patient census of 170, with a monthly turnover of 30 to 50 patients, Pinter said.

There is a charge for the nonprofit agency's services, which are classified as custodial. Few insurance policies cover activities of daily living, Pinter said. Rates for services vary from \$15.54 for a four-hour visit to \$18 for a one-hour visit.

Personal Care Services staff consist of 130 certified nursing assistants, companions and nursing assistants, six R.N.s and four L.P.N.s (licensed practical nurses). Staff provided 157,167 hours of service to residents in 1996. Clients may sign up for one visit or indefinitely. Two patients have been using bathing services for 14 years.

The agency has been fortunate to receive grant funds from SCCF for about 15 years, Pinter said. The \$15,000 grant it received in 1996 included an additional \$4,000 to start the R.N. Case-Management program for needy Sun City residents, she said.

"We're nonprofit, so our contribution is all the overhead. None of that is charged to the fund, so every penny of it goes to that home visit," Pinter said. "If we didn't have (the SCCF grant), that 7 percent wouldn't be getting the help they need. I don't know what they'd do."

Home care policies are expensive, which puts clients who can't afford the policies in a double bind — they can't afford home care either, Pinter said, adding, there are times clients would go to a nursing home, but they can't afford that either.

Typical recipients of aid from SCCF monies tend to be in their 90s, she said.

"The SCCF is really keeping their

standard of living up, keeping their homes clean, allowing them to remain at home," Pinter said.

If Sun City clients tip off agency staff that they really can't afford needed services, Pinter said, staff encourage them to apply for the grant. Potential aid recipients submit a financial report, and service costs are then based on a sliding scale. Because the fund is limited, a cap amount is set for each patient, she said.

Information on the community fund, which is conducting its annual fund drive, may be obtained by calling 876-0178. For information on Sun Health Personal Care Services, call 974-7500.

# Community fund gears up for drive

By MARY L. CRIDER  
Staff writer

By starting its fund-raising drive later than usual, the Board of Directors of the Sun City Community Fund hopes it will bring in higher-than-usual contributions.

"Our campaign this year will determine where the community fund goes (in the future)," said Jane Freeman, board president.

Informational brochures and return envelopes will be distributed via first-class mail to Sun City households starting Monday.

Although the drive collected more than \$300,000 last year, donations have been down about \$100,000 in the past few years, Freeman said.

The fund started in 1966 as a localized alternative to giving to the Glendale United Way Fund, initially funding four agencies working in Sun City to ease needs primarily associated with aging — Sunshine Service; Visiting Nurse Service of Phoenix; Sun Valley Lodge and Northwest Hospital. It now funds 16 area agencies.

In keeping with its 31-year-old objective, donated money stays in Sun City to help needy residents. And through its Personal Needs Program, the fund offers something United Way cannot — direct assistance to individuals, Freeman said.

In 1996, the fund helped almost 40 residents weather emergency situations including lack of money to pay utility bills, to repair air conditioners, to pay pharmacy bills for people who depleted their insurance benefits and to help make initial nursing

home payments.

In one case, a woman was found mid-summer without a working air conditioner, Freeman said. Her house was like an oven, a life-threatening situation. She had only \$42. If she repaired her air conditioner, she'd have no money left to buy food. The fund helped.

Directed by retired social worker Florence Jerousek, the Personal Needs Program guards the anonymity and confidentiality of its aid recipients.

To ensure that the money it raises in its eight-week annual drive and throughout the year goes to the needy, fund staff members serve as volunteers, and the organization does not rent office space. Its only expenses are the printing and mailing of campaign literature.

However, the area population is growing — along with it, area need and the number of human services agencies seeking funding — but donations have dropped, resulting in funding cutbacks to and possible curtailing of services of those agencies serving Sun City residents.

"We were competing with too many other community-wide campaigns in the fall. We thought we'd try one this year in January to see if we got better results," Freeman said.

If every resident gave a dime a day, an annual contribution of \$36.50, the fund could more effectively meet area needs, Freeman and community relations chairman Douglas Wright wrote in their letter to residents.

Agencies funded in part through



the Sun City Community Fund are: Interfaith Services; American Red Cross; Salvation Army; Sun Health Personal Care Services; Hospice Volunteer Services of the Sun Cities Area; Sun Cities Area Transit System; Sun City Library; Sun Cities Information and Referral Service; Olive Branch Senior Center; Jewish

Social Service; Sun Cities Area Volunteer Placement Service; Westside Food Bank; Sun Sounds; Sun Cities Area Historical Society; Sun Cities Area Community Council and Personal Needs Program.

To make a contribution, write to Sun City Community Fund, P.O. Box 1355, Sun City, Ariz., 85372.

**Daily News-Sun**

Thursday, Jan. 16, 1997

# Agencies garner \$200,000

## Community Fund contributions to remain in Sun City

Staff report

Sun City Community Fund Grants Committee Chairman Fred Curtis has announced \$200,000 in grants to 14 local human service agencies.

"There were some heart-wrenching decisions which had to be made as we had requests for twice as much financial assistance than the campaign generated," Curtis said of the organization's efforts to raise funds this year.

The Community Fund has received fewer contributions in recent years, prompting the organization to join forces with the Valley of the Sun United Way. It is hoped that through this partnership, Curtis said, that the local service agencies will receive additional funding.

The Community Fund was

### Sun City Community Fund grants

■ Hospice Volunteers .....	\$7,000
■ Sun Cities Area Volunteer Placement Services .....	\$5,000
■ Interfaith Services .....	\$25,000
■ Westside Food Bank .....	\$3,000
■ Sun Health Personal Care .....	\$20,000
■ NW Valley Regional Community Council .....	\$25,000
■ Information & Referral Service .....	\$6,000
■ American Red Cross, Sun City .....	\$5,000
■ Sun Cities Area Transportation .....	\$35,000
■ Olive Branch Senior Center .....	\$50,000
■ Sun City Library .....	\$12,500
■ Jewish Family & Children's Service .....	\$5,000
■ The Salvation Army, Sun City .....	\$2,000
■ Sun Sounds .....	\$3,000

established in 1966 as an alternative to contributing to the Glendale United Way Fund. Sun City residents preferred to keep local dollars at home working for Sun City agencies.

The new partnership with

the Valley of the Sun United Way will not divert local dollars away from the area.

"All contributions raised in Sun City will remain in Sun City," Curtis said. "It is important that Sun City residents know this."

Sat., April 12 and Sun., April 13, 1997 Daily News-Sun, Sun City, Ariz.

# Program meets personal needs

12th in a series

By MARY L. CRIDER  
Staff writer

Money donated to the Sun City Community Fund stays in Sun City to help Sun City residents. The United Way can't promise that.

Through its Personal Needs Program, the SCCF can help individuals needing short-term emergency financial assistance. The United Way can't do that either, said Florence Jerousek of Sun City.

Jerousek, a retired social worker, is one of five SCCF board members comprising the Personal Needs Committee. The Personal Needs Program was established nearly 30 years ago by the Ministerial Association, when they found the need existed, said Jerousek, who has served on the committee for six years. Its five volunteers work out of their own homes and automobiles, using their own telephones.

"We work with the social workers in the area, with the different churches and with Maricopa County. When they see a need they can't meet, we step in to help out on a personal basis. We don't fund on a monthly basis, but we do pay bills," Jerousek said.

Working with a \$40,000 annual budget, the Personal Needs Program has paid, on an emergency basis, electric bills for Sun City residents.

"In the hot summertime electric bills go up. Some people just can't manage them. We'll step in and pay an overdue electric bill. For elderly people here, it's not healthy to do without air conditioning," she said.

In one case, the program paid for car repairs so a resident could get to work. In another, a woman was so worried about money that she wouldn't even call out a refrigeration repair person. The Personal Needs Program paid the \$42 bill for repairing her refrigeration unit.

When one area woman was faced with a choice between buying food or medicine, the program paid for her prescriptions. Rather than see needy residents do without the personal care services they needed to remain independent in their own homes, the program has picked up the temporary tab for their home health care aides.

"Here there are so many



Steve Cherek/Daily News-Sun

Florence Jerousek, a retired social worker, serves on the Personal Needs Committee of the Sun City Community Fund.

sandwich-generation folks that have parents needing to go into nursing homes but are unable to pay the initial cost. As long as they have applied for The Arizona Long Term Care System (which pays for some long term care if the individual meets financial and functional criteria), we'll pay the first month (of nursing home care)," Jerousek said. "And if the state approves them for the long-term care program, it will reimburse us for a portion of those costs."

Currently, she said, the program is paying the Meals on Wheels bills for some couples.

Started in 1966 as a local alternative to giving to the United Way, SCCF's annual fund-raising drive is

in its 13th week. So far the fund has received about \$125,000 in donations. With requests in hand for more than \$400,000 in grants, fiscal 1998 may be the second consecutive year SCCF faces a drastic drop in donations and is forced, in turn, to reduce funding grants.

SCCF is the sole source of funding for the Personal Needs Program.

"Because it is a major priority of the fund, we've never spent our whole budget, and we've never been denied having a bill paid," Jerousek said. The committee considers that unspoken agreement between the SCCF and the program a blessing, Jerousek said, "Because if we have to replace someone's air condition-



Jane Freeman/President of Community Fund says all funds will stay in Sun City.

# Community Fund joins forces with United Way

## Valley-wide group to assist Sun City organization with annual fund-raising efforts

The Sun City Community Fund will for the first time ever join forces with a Valley-wide agency in conducting its annual fund-raising campaign.

Community Fund officials last week announced plans to join forces with Valley of the Sun United Way in conducting its annual campaign.

According to Jane Freeman, president of the

Community Fund, the move will allow the Community Fund to take advantage of the United Way's expertise and management skills. All money raised in Sun City, she stresses, will remain in the community.

"We wanted to make certain that what we've been doing in Sun City continues," she says.

"Under this new agreement with United Way, we think that together we'll be more efficient and be able to help even more people in need here in Sun City."

For more than 30 years, the Sun City Community

Fund has been providing funds to agencies that serve local residents, as well as helping those individuals facing serious financial hardships.

A drop in contributions, coupled with an increase in requests for grants, has forced the Community Fund to cut back on donations to area agencies.

Valley of the Sun United Way operates in much the same manner as the Community Fund, but its focus is on assisting agencies Valleywide.

Established in 1925 as the Community Chest, the

See ■ FUND, Page 3

PAGE 2—SUN CITIES INDEPENDENT—JUNE 18-24, 1997

## ■ FUND

From Page 1

organization has evolved through the merger of separate United Way organizations in Tempe, Scottsdale, Glendale, Chandler and Phoenix.

Officials say the key advantage to the new merger will be that the Sun City Community Fund can now focus their attention on funding recommendations and program delivery — rather than day-to-day administration.

The Valley of the Sun United Way will be responsible for fund-raising and administrative duties.

"We're an organization of donors and volunteers concerned about the whole Valley and the Sun City community is a welcome addition to the communities we represent," says Brian Hassett, president of Valley of the Sun United Way.

"The consolidation of duplicate functions will allow the Community Fund to take advantage of the experienced professional staff of United Way in areas of fund raising, marketing, administration and distribution of funds."

The Community Fund will continue to review requests for funds from nonprofit agencies for funding and will distribute funds to individuals in Sun City who are in need of personal assistance.

"The character of the Sun City Community Fund will be maintained and money raised in Sun City will remain in Sun City," says Hassett.



# Community Fund donations drop

## Self fund-raising organizations risk contribution loss

By J.J. McCORMACK  
Senior staff writer

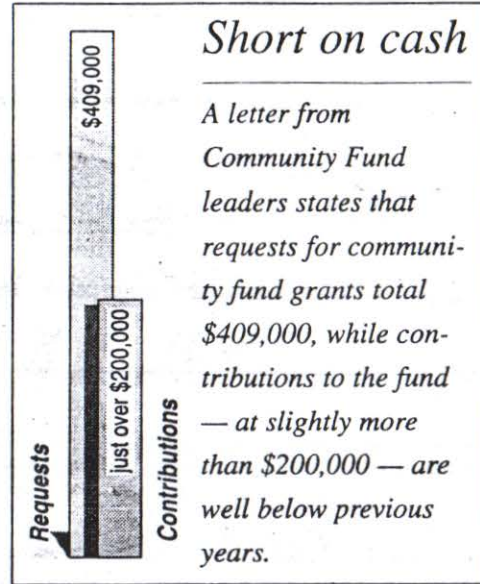
Sun City Community Fund officers have served notice that they may withdraw support next year from organizations that do their own fund-raising.

In a letter to the 16 non-profit organizations it supports annually with cash grants, Community Fund leaders said dwindling contributions may prompt them to downsize and accommodate only those organizations that rely solely on the community fund to meet their operating needs.

The unsigned letter states that requests for community fund grants total \$409,000, while contributions to the fund — at slightly more than \$200,000 — are well below previous years.

"The decline in contributions is due, in part, to the fact that many of the organizations that look to us for support actively conduct communitywide fund-raising drives themselves. Hence, we are competing for the same charity dollar. We also recognize charitable contributions are down in general," the letter states.

"We have given this problem serious consideration. In the future, the Fund may have to allocate funds



Kevin Deitle/Daily News-Sun

only to those organizations that do not have independent fund-raising drives. For this reason, we suggest that those of you conducting your own fund-raising drives not include the Sun City Community Fund in your budget plans next year."

Among the organizations that receive annual grants from the community fund and do their own fund-raising mailings are Sun Cities Area Interfaith Services and Sun Cities Area Transit System.

Representatives of those organizations said they don't want to lose the community fund's support.

"We understand the reasons behind it, but certainly if they're going to pull our funding, that would significantly curb our ability to provide

services," said Gina Griesman, interfaith services vice president for community relations.

The non-profit Interfaith provides a variety of services in the Sun Cities, including adult daycare, counseling and home-care. The organization received \$60,000 from the community fund last year.

SCAT receives about \$60,000 annually from the community fund, said Dale Shockley, president of the dial-a-ride service's board of directors.

Shockley said he too understands that the community fund is having difficulty raising funds, but hopes SCAT will continue to get an annual grant.

"If you drop off the \$60,000 that's a big drop," Shockley said. "I'm more optimistic than I probably should be after reading this letter, but I think the community fund is well aware of the importance of SCAT. I don't think we will be cut entirely."

Supported organizations that do not conduct formal fund drives include the Sun Cities Area Community Council and Volunteer Services of the Sun Cities.

Sylvia Cartsonis, executive director of the community council, said the council has remained loyal to the principals under which the community fund was founded 30 years ago — to serve as the fund-raising arm for local charities. In return, the council advertises and promotes the community fund, she said.

"If you're part of a community fund, there should be a single fund drive. That's the whole idea. ... By

having separate drives, everybody is paying mailing costs. That's another reason for a single fund drive, because it really conserves resources," Cartsonis said.

Ideally, all charitable giving should go to the community fund and be distributed on the basis of need, said the Rev. Doug Wright, community fund spokesman.

Wright regularly makes presentations about the community fund to local service and civic groups. He said people often tell him after his speech that they already give to IFS or SCAT.

When people don't give to the community fund it hurts the smaller charities that don't do separate fund drives, Wright said.

To ensure the needs of small organizations are met, the community funds may have to withdraw its financial support of IFS, SCAT and other larger charities next year, Wright said.

"This is not a decision that has come about overnight. We've been looking at this for a year ... This is a result of those thoughts. The fact is we have to be realistic," Wright said.

Meanwhile, the community fund board will meet next week to consider this year's grant recommendations.

Because of dwindling contributions, the requests of all 16 charities were cut, said Helen Struble, grants committee chairwoman.

Whether a charity conducts its own fund-raising venture was not a factor in the grants committee's recommendations this year, Struble said.

# Local fund helps carry Red Cross

Sixth in a series

By MARY L. CRIDER  
Staff writer

From July to December, American Red Cross drivers made 6,657 transportation services trips in Sun City.

In the area, they provided rides for 353 wheelchair-bound clients, the highest number of any transportation service in Maricopa County. They delivered 2,595 meals to the home-bound and made 888 trips to dialysis centers — the highest number of dialysis trips in the county, said Maxine Andrson, Red Cross director.

One of 15 agencies funded by the Sun City Community Fund, the Red Cross must raise \$50,000 in area contributions in order to contract with the county to provide special needs transportation services for seniors, low-income and disabled residents throughout Maricopa County, Anderson said.

Riders contribute whatever they are able, in amounts ranging from 25 cents to \$1 per trip. Organizations such as the Lions Club and the Kiwanis help out. The SCCF grant is crucial to the success of the program.

"Last year we got \$16,000. In the previous year, we received \$20,000. Our Sun City funding accounts for about 50 percent of what we raise," Anderson said, pointing out that together, donations from all those funding sources allow the agency to provide services.

Started in 1966 as a local alternative to giving to the United Way, SCCF's annual fund-raising drive is under way now. To date, SCCF has received \$107,711.78 in 3,922 gifts, board member The Rev. Douglas

Wright said Thursday. But the fund has requests in hand for more than \$400,000 in grants; without additional contributions, the fund won't be able to meet those requests, Wright said. Donated money stays in Sun City to help Sun City residents.

In Sun City, 85 Red Cross volunteer drivers provide rides for residents in vehicles provided by the county. The agency needs about 100 drivers to meet the demand for rides to medical appointments, social, recreational and critical needs, such as grocery shopping, Anderson said. "To access the service, call the office (336-6670). Gloria (Taylor, site coordinator for Sun City) or Dottie (Leimbach, volunteer) will set up an appointment," Anderson said. "The priority list is medicals first, then it's first come, first served."

Drivers are responsible for performing general inspections of their vans each day before picking up clients. They maintain a driver's log, prioritizing riders by need. In addition, they supply prescription pick-up and delivery services, deliver about 100 meals daily to the home-bound, and the night before they run their routes, they call each one of their clients, making sure they still want the ride and telling them when the drivers will pick them up, Leimbach said.

"It eliminates anxiety for the client and allows the driver to make a more efficient run," Leimbach said.

Drivers don't just drop people off and pick them up, Taylor said, they take a more personal interest in their riders.

"If someone doesn't answer the door, if they are delivering a meal.



Mollie J. Hoppes/Daily News-Sun

Nathan Barkdoll, left, and Bill Stuke of Sun City look over their route schedule for the day. The men are volunteer drivers for the American Red Cross.

for example, they'll have someone at the office telephone. And if there is no response, (Red Cross) staff follow up. In at least one instance, we found someone unconscious on the floor," Taylor said.

There is no "typical" Sun City recipient of the transportation service. What they all have in common is they are no longer able to transport themselves, the three staffers agreed.

More men ride to the dialysis centers, and more women go to the

senior centers and have meals delivered, Leimbach said. In some cases, riders are low-income people who retired years ago, and their fixed pensions don't cover as much as they used to, she said.

Red Cross transportation services clients must be mobile because the agency cannot handle patients who must be transported on a stretcher.

For information about the Red Cross, call 336-6670. For information about SCCF, call 876-1078.

Sat., April 20 and Sun., April 21, 1996

# Community Fund donations drop

## Self fund-raising organizations risk contribution loss

By J.J. McCORMACK  
Senior staff writer

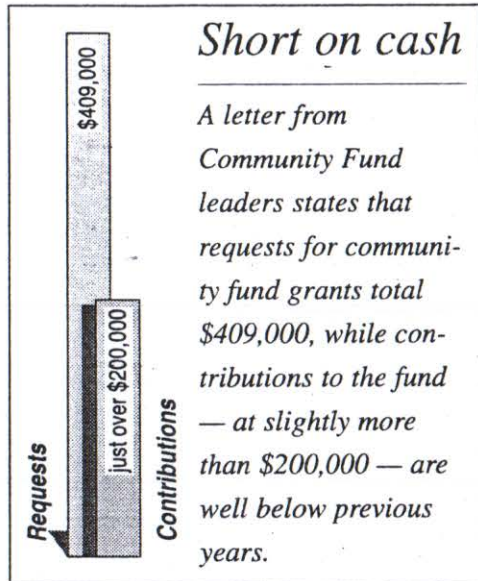
Sun City Community Fund officers have served notice that they may withdraw support next year from organizations that do their own fund-raising.

In a letter to the 16 non-profit organizations it supports annually with cash grants, Community Fund leaders said dwindling contributions may prompt them to downsize and accommodate only those organizations that rely solely on the community fund to meet their operating needs.

The unsigned letter states that requests for community fund grants total \$409,000, while contributions to the fund — at slightly more than \$200,000 — are well below previous years.

"The decline in contributions is due, in part, to the fact that many of the organizations that look to us for support actively conduct communitywide fund-raising drives themselves. Hence, we are competing for the same charity dollar. We also recognize charitable contributions are down in general," the letter states.

"We have given this problem serious consideration. In the future, the Fund may have to allocate funds



Kevin Deitle/Daily News-Sun

only to those organizations that do not have independent fund-raising drives. For this reason, we suggest that those of you conducting your own fund-raising drives not include the Sun City Community Fund in your budget plans next year."

Among the organizations that receive annual grants from the community fund and do their own fund-raising mailings are Sun Cities Area Interfaith Services and Sun Cities Area Transit System.

Representatives of those organizations said they don't want to lose the community fund's support.

"We understand the reasons behind it, but certainly if they're going to pull our funding, that would significantly curb our ability to provide

services," said Gina Griesman, interfaith services vice president for community relations.

The non-profit Interfaith provides a variety of services in the Sun Cities, including adult daycare, counseling and home-care. The organization received \$60,000 from the community fund last year.

SCAT receives about \$60,000 annually from the community fund, said Dale Shockley, president of the dial-a-ride service's board of directors.

Shockley said he too understands that the community fund is having difficulty raising funds, but hopes SCAT will continue to get an annual grant.

"If you drop off the \$60,000 that's a big drop," Shockley said. "I'm more optimistic than I probably should be after reading this letter, but I think the community fund is well aware of the importance of SCAT. I don't think we will be cut entirely."

Supported organizations that do not conduct formal fund drives include the Sun Cities Area Community Council and Volunteer Services of the Sun Cities.

Sylvia Cartsonis, executive director of the community council, said the council has remained loyal to the principals under which the community fund was founded 30 years ago — to serve as the fund-raising arm for local charities. In return, the council advertises and promotes the community fund, she said.

"If you're part of a community fund, there should be a single fund drive. That's the whole idea. ... By

having separate drives, everybody is paying mailing costs. That's another reason for a single fund drive, because it really conserves resources," Cartsonis said.

Ideally, all charitable giving should go to the community fund and be distributed on the basis of need, said the Rev. Doug Wright, community fund spokesman.

Wright regularly makes presentations about the community fund to local service and civic groups. He said people often tell him after his speech that they already give to IFS or SCAT.

When people don't give to the community fund it hurts the smaller charities that don't do separate fund drives, Wright said.

To ensure the needs of small organizations are met, the community funds may have to withdraw its financial support of IFS, SCAT and other larger charities next year, Wright said.

"This is not a decision that has come about overnight. We've been looking at this for a year ... This is a result of those thoughts. The fact is we have to be realistic," Wright said.

Meanwhile, the community fund board will meet next week to consider this year's grant recommendations.

Because of dwindling contributions, the requests of all 16 charities were cut, said Helen Struble, grants committee chairwoman.

Whether a charity conducts its own fund-raising venture was not a factor in the grants committee's recommendations this year, Struble said.

## SC Community Fund boosts campaign goal

By JACQUE PAPPAS  
Daily News-Sun staff

SUN CITY — Sun City Community Fund launches its 26th annual campaign today with the aim of collecting \$350,000 in donations.

All of the Community Fund's solicitation is done by mail. Sun City residents should be receiving letters this week asking for their support.

The goal for this year's campaign, with the theme "Special Kind of Caring," is \$50,000 more than last year, said the fund's president, William Forman.

"An increase of \$50,000 over last year's goal is needed because of an increase in requests for assistance from both individuals and the non-profit agencies the fund supports," Forman said. "The original con-

cept of making a single donation to serve many needs is still alive in spite of the many appeals for charitable contributions."

The Community Fund provides confidential assistance to Sun City residents who face financial devastation, makes grants to local and area health and welfare agencies and works with local organizations to reduce the large number of door-to-door solicitations.

Sun Valley Lodge, Sun Cities Area Interfaith Services, Olive Branch Senior Center and Sun City Information and Referral Service are among the many organizations that receive funding.

Since 1966 Sun Citians have contributed more than \$5 million for the fund. Last year's campaign drew donations from 6,618 households, clubs,

See \$350,000, A5

## \$350,000 is needed for services

—From A1

churches and businesses. The fiscal year ends July 31.

The 1990-91 campaign was the group's most successful year ever, said Eugene Wright, community relations chairman for the non-profit organization. Public contributions totaled \$284,087, an increase of 9 percent from the year before.

The first part of this year's campaign involved the mailing of information packets to 26,000 households in Sun City, Wright said. A follow-up mailing will be sent to 500 businesses and professional offices serving the community.

"Unfortunately, a myth persists about Sun City that all residents are affluent. On the contrary, Maricopa County Health Services ... states that one out of every 25 Sun Citians is living at or below the poverty level. It is this disadvantaged group that Sun City Community Fund is designed to help," Wright said.

"Looking at the problem more positively, if one in 25 needs help, that leaves 24 others to ease the burden on their less fortunate neighbors."

Wright said less than 5 percent of the total receipts goes for overhead, most of which is for printing and mailing.

All the work of the organization is done by volunteers who work out of their homes. The fund, which is totally independent, is governed by a 25-member board of Sun City residents.

The Community Fund was founded in 1966 by a group of board members of the Sun City Home Owners Association.

Wright said inflation in the cost of goods and services such as food, medicine and medical care will inevitably increase the need for more funds.

# Sun City fund is good neighbor

By **CONNIE STEELE**  
Daily News-Sun staff

Sun City Community Fund's motto is "Neighbor helping neighbor."

The motto is right on the money because Sun City dollars donated to the fund stay in Sun City.

The motto also reflects the personal financial help the fund offers in times of need — like one neighbor helping another.

Unlike other agencies, the community fund agencies of Sun City and Sun City West "are the only ones we know of that give direct assistance," said William Forman, president of the Sun City Community Fund.

Forman has been the Sun City fund's "driving force" for the past five years, said Eugene Wright, public relations chairman. "He's been a rock for volunteers and 1991 is the most successful year we've had so



Steele

## Did you know?

far."

"We paid \$34,000 directly to individuals this past year," Forman said. "Some very tough cases."

The fund respects confidentiality and individual cases can't be discussed, but sometimes "people from Sun City who've had to move into a care center have used up their funds," Forman said.

Interest-free loans or outright grants may be awarded through the fund's Personal Needs Program.

The Sun City Community Fund has been around since 1966 when a doctor and a member of the Home Owners Association board of directors "saw a need for a local community fund," Forman said.

By 1990, more than \$4 million had been distributed to Sun City residents and health and welfare organizations in Sun City.

A partial listing of beneficiaries this past year is Sun City Library, \$20,000; Olive

Branch Senior Center, \$21,500; Sun City Area Transit System, \$30,000; Sun City Information and Referral Service, \$17,000; Sun City Area Interfaith Services, \$35,000.

Donations of more than \$286,000 this year fell shy of the fund's \$300,000 goal, Forman said. But \$12,271 in interest helped.

"Money stays in the bank until it's disbursed," he said.

The fund's biggest boost came from the year-old Sun City Community Foundation, which was formed from endowments bequeathed to the community fund.

A more than \$850,000 bequest from Albert and Elsie Jacobi in 1989 forced board members to form the Sun City Community Foundation, a non-profit organization to handle bequests, Forman said.

The interest from endowments that range from \$2,000 to the Jacobi's nearly \$1 million serves the community where the owners once lived.

## DOERS PROFILE

### William Forman

#### Vitae

Bachelor's in Electrical Engineering, West Virginia University. Thirty years with Eastman Kodak Co.

**Hometown** Rochester, N.Y.

**Valley home** 16 years in Sun City.

**Marital status** Working on 51 years to Louise Forman.



**Self-portrait** Community-minded, people person, problem solver, technically oriented.

**Motto** Make each day a better day than yesterday.

**Greatest feat** Progressed to chief engineer at Kodak.

**Walter Mitty fantasy** To earn a doctorate in engineering.

**Inspirations** My mother, dad and wife.

**Good/bad habits** Hard worker. I expect too much of others.

**Favorite food/drink** Lobster. Canadian Club whiskey and soda.

**TV programs** "Jeopardy" and PBS programs.

**Books at bedside** "Life on the Road" by Charles Kuralt.

**Vacation spot/luxury:** Cruise ship. A resort hotel.

**Key to longevity** Stay busy.

**Last words** "Help your neighbors."

# + Community fund giving area agencies \$289,500

By Lori Baker  
Staff writer

**SUN CITY** — The Sun City Community Fund this month is distributing \$289,500 in donations to 16 community agencies to serve needy residents.

The 1991 fiscal year grant is the largest since the Sun City Community Fund was started in 1966, said Gene Wright, community relations committee chairman for the community fund's 23-member volunteer

board.

"These donations were made from individuals and businesses in Sun City," he said. "But we can always use more donations, because we don't have enough to meet all the requests."

This year's requests from community agencies total about \$340,000. The community fund's board approved allocating the money before June 30. Contributions this year were about \$30,000 higher than

the previous year.

During the past 25 years, about \$3.7 million in donations has been collected for the community fund. During the first four years, \$10,000 was raised each year; in 1976, \$100,000 was generated, and in 1981 the effort hit the \$200,000-mark. The community fund is Sun City's version of the United Way.

"We haven't yet raised \$300,000 in a year, but we were pretty close this year,"

Wright said.

Besides providing grants to community agencies, the community fund board earmarks about \$42,000 annually to be given directly to Sun City residents who have specific problems. The board's personal needs committee screens the requests for assistance.

"There was one lady who sat through the whole summer without air-conditioning because she couldn't pay her power

bill. We paid it for her," he said. "Another couple had a roof leaking, and their home was the only resource they had left. We helped with roof repair so it wouldn't damage the house."

Next year's campaign will start in September and continue through December. About 26,000 Sun City households are sent letters asking for donations. Subsequently, businesses are sent solicitations. See GIFT, Page 4

## GIFT

for donations. Some businesses have donated as much as \$5,000, while most give between \$100 and \$250, Wright said.

Agencies are required to submit detailed applications for funds, which are reviewed by the board's grants committee.

Community agencies awarded grants are:

- American Red Cross, Sun City branch. \$22,500 will be used to provide free van transportation to take needy Sun City residents to medical appointments, shopping centers and senior centers.

- Sun Cities Areas Community Council. \$52,500 for a Wake Up, Tuck In Service, Olive Branch Senior Center, visually impaired program and senior housing counseling service.

- Good Shepherd Care Center.

- \$12,000 to provide financial assistance to former Sun City residents who have exhausted their financial ability to pay for nursing home care.

- Hospice Services of Sun City. \$7,000 to provide assistance to the terminally ill and their families.

- Information and Referral Service of the Sun Cities. \$17,000 to assist Sun City residents in locating health, welfare, social services and general services to meet their needs.

- Sun City Area Interfaith Services. \$52,500 for Sun City day Care Center; Home Support Service program, which provides shopping for shut-ins, handyman services and home companion services; and crisis counseling program.

- Jewish Social Services of Sun City. \$5,000 to supply geriatric

social services to Sun City residents on a non-denominational basis.

- Pelms House. \$5,000 to provide drug and alcohol rehabilitation services to Sun City residents.

- Salvation Army, Sun City Branch. \$15,000 to provide social services, food and financial assistance to needy Sun City residents.

- Sun City Library. \$20,000 to provide mental and intellectual stimulation for Sun City residents.

- Sun City Area Transit System. \$30,000 to provide transportation for Sun City residents.

- Sun Health Home Care Service. \$3,000 to provide home care assistance to needy Sun City patients released from Walter O. Boswell Memorial Hospital.

- Sun Sounds. \$4,500 to supply closed-channel receivers and infor-

mational broadcasts to the visually or physically impaired Sun City residents.

- Sun Valley Lodge. \$24,000 to provide financial assistance to Sun City residents who have exhausted their resources due to the cost of nursing care.

- Volunteer Bureau of the Sun Cities. \$7,500 to recruit and channel Sun City volunteer workers to local support agencies.

- Westside Food Bank. \$12,000 to provide food for needy Sun City residents.

# Windfall forces fund split

By TIFFANY MEANS  
Daily News-Sun staff

SUN CITY — The Sun City Community Fund has established a separate non-profit organization for endowments after receiving a single bequest of nearly \$1 million, officials said.

The Sun City Community Fund Foundation was created May 30 during a special meeting.

The Community Foundation is designed to accumulate and preserve capital and create interest to be used by its parent organization.

It also was designed to receive contributions and to distribute them directly to the community, spokesman Gene Wright said.

"When you get an amount

over \$1 million, it's better to separate those two functions. It's a highly specialized job to control that amount of capital," Wright said.

The income from the Community Foundation will be only a portion of the money needed by the Community Fund, but the amount will help increase support of present services, Wright said.

The income also will help buffer unexpected shortfalls in contributions and permit the Community Fund to respond more directly to changing social needs within the community, Wright said.

Capital funding for the Community Foundation will be derived from the Community Fund's endowment account,

composed of bequests and memorials made between 1985 and 1989, Wright said.

The capital amount now totals more than \$1 million, the bulk of which was received recently in a \$884,000 bequest from Elsie Jakoby, a former Sun City resident, who died in August 1989.

The Community Foundation will be responsible for keeping the capital intact so that income generated will be available perpetually to individuals and organizations that benefit Sun City residents.

The declaration of trust that governs the Community Foundation states that all net income from the capital amount will be distributed quarterly to the Community Fund to help sup-

port charitable programs.

"We don't know for sure what the income rate will be from the interest on the capital because the rates will fluctuate from year to year," Wright said. "But for now, we think we could generate \$80,000 a year with that capital amount."

A nine-member distribution committee of Sun City residents who are contributors to the Community Fund will administer the Community Foundation.

Members of the initial committee, who will serve without pay, were elected Wednesday by the Community Fund's board of directors.

Three officers were elected: William Forman, chairman; Eleanor Mitchell, secretary, and See Fund, A4

## —From A1

Thomas Cooper, treasurer.

Other members are William Fisher, Bernard Grangaard, Robert Gilkeson, Mabel Ross, Forde Steele and Newland Warner.

Forman is now vice president of the Community Fund, and has served as president in the past.

"I think the Foundation is a good idea. We had endowment activity before, but as it grew larger and larger, we felt it needed more attention," Forman said.

His main duties will be to analyze the investment of funds,

to make sure they are properly protected, and to disburse the interest correctly, Forman said.

"This is the largest bequest we have ever received. The largest we had before was \$68,000, which we used to establish endowment fund back in 1985," Forman said.

Because funding from the Community Foundation will be insufficient to entirely meet the Community Fund's needs, annual contribution drives within the community will continue, Wright said.

The next campaign will begin Sept. 24 with a goal of \$300,000.

# Fund hopes Sun City will come through for needy

By Connie Cone Sexton  
Staff writer

SUN CITY — A fund-raising goal of \$300,000 is being set again for the Sun City Community Fund, even though the amount has been difficult to raise in recent years.

"Unfortunately, in the four previous campaigns we have fallen short of this goal," fund treasurer Thomas Cooper said. "But as long

as we continue to get urgent requests for grants totaling well over \$300,000, we would be shirking our duty to ask contributors for less."

This is the Community Fund's 25th year of service to Sun City. The "Giving is Living silver anniversary fund-raising drive was launched today. Requests for donations and information packets are

being mailed to about 26,000 households this week; no house-to-house canvass or phone solicitations will be made.

Material in the packets includes the goals of the Community Fund and details how past contributions were distributed.

Providing financial assistance to needy Sun City residents remains a major goal of the organization,

fund president Frank Corwin said.

A reliable source of support for the many non-profit organizations that serve the health and welfare needs of the community also is a key issue, he said.

"Sun City has a health and welfare support system virtually unequaled," Eugene Wright, community relations chairman, said. "Although the support system is

manned by local volunteers, financial support is still required. That's where the Community Fund comes in. We support the support system to the limit of the resources given to us by generous Sun Citians."

More than \$4 million has been given to the fund since it began.

Contributions during the past several years have been relatively stable, Cooper said. The 1989-90

fund drive netted about \$263,650 from 6,287 contributors. Although the number of contributions dropped by about 8 percent, the average contribution of \$41 made the total proceeds compare favorably with those of previous campaigns, fund officials said.

Grants by the fund to local non-profit agencies also directly

See FUND, Page 9

## FUND

From Page 1

benefit the community, grants chairman Thomas Engelhardt said. "We target our grants to selected functions with the support agencies. For example, the funds granted to Interfaith Services are targeted at supporting the needy clients who attend the agency's day care centers."

Money granted to the American Red Cross is earmarked to support van transportation for the frail elderly and disabled Sun Citians.

"It's obvious, however, that we are not able to supply all of the needs of the local organizations, even with the generous support we receive," Engelhardt said.

Wright said the Sun Citians rely little on government agencies to organize and manage the support system for the community. "To a great extent, Sun Citians organize, manage and finance their own

system . . . Fortunately, most Sun Citians have the desire and will to share with others and realize that giving is a part of living."

Helen Cann, personal needs chairman, oversees the program of making grants and loans to individuals who find themselves "in desperate financial condition."

Many Sun Citians exist on a precarious balance between self-sufficiency and dependency. An accident or illness can threaten their ability to live independently, Cann said.

"These are the people to whom we want to offer a helping hand. The elderly couple whose leaking roof threatens to destroy their only remaining resource, or the widow whose pharmaceutical bills have ballooned out of all proportion to her available funds. These are the people we want to help. We just hope that they will not be too proud to ask for our assistance."



# Fund gains \$884,000 donation

## Modest woman generous to end

By Connie Cone Sexton  
Staff writer

SUN CITY — Those who remember Elsie Jakoby say she was a nice, pleasant woman who loved helping fellow nursing home patients — wheeling them to the dining hall or cajoling them into taking their medicine.

Jakoby's penchant for generosity of time and thought continues even after her death.

She left about \$884,000 from her estate to the Sun City Community Fund, a non-profit organization that aids local service agencies.

The gift took Jakoby's beneficiaries by surprise even though she had been a supporter, said William Forman, chairman of the Sun City Community Fund Foundation.

"Before her death, she had been supporting the Community Fund, and as we understand it, it was natural that she would leave her money to charity," he said.

Jakoby, who died Aug. 14 in the Plaza Del Rio Care Center in Peoria, is a former Sun City resident.

Her estate has been in probate since her death. Community Fund board members only recently received the endowment and promptly chose to use it to establish the Sun City Community Fund Foundation.

Forman said Jakoby's gift is the largest ever received by the non-profit organization and puts the foundation's account at about \$1 million.

Money from the endowment account will help the foundation guard against shortfalls in contributions and respond more directly to changing social needs within the community, board members said.

Despite her generosity, Forman said, the board knows very little about Elsie Jakoby.

"She and her husband (Albert) were originally from Philadelphia. He had worked for Sears Roebuck (& Co.)," Forman said.

The couple moved to Sun City in 1971. Albert died in 1987, leaving behind a wife who knew very little about their financial situation, Forman said.

"Apparently, she really didn't know how much money she had. After his death, she was bewildered. Some of the neighbors said she ought to have a trust officer help her out. She didn't even know if she had enough to live on."

Sun City attorney Ron Larson, who later drew up Elsie's will, agreed, saying she never really understood that her estate was worth nearly \$1 million.

"She had seen that she had (bond)

See BEQUEST, Page 3

*No. West. Chron. Ariz. Reg. p. 1W - 6-13-90*

# BEQUEST

shares but probably didn't know they could be worth \$10,000 a share, not just \$100," he said.

Because she had wanted to donate to charity but wasn't sure which one, Larson recommended the Community Fund, which serves a number of organizations.

In the late 1980s, Elsie and Albert moved into the care center, coming under the watch of Joan Elliott, one of the nurses on their wing.

"Elsie was a pleasant, quiet lady. She was very friendly and got a lot of joy out of helping others. She was a gracious lady and

complimented anything you did for her," she said.

Elsie enjoyed visiting with other patients, Elliott said.

"She'd wheel them in to dinner and would talk with them so they'd take their medicine."

When Albert died, Elsie didn't want to move out of their room, the nurse recalled. Her bond to him was strong, she added.

"He seemed to handle everything, money-wise. She was basically the homebody type. She didn't get into business. I don't think she realized what she was worth," she said.

Elsie didn't want to spend money on herself, Elliott said.

When someone suggested she buy a television for her room, Elsie balked, Elliott said.

"She just thought it was the biggest thing. Money never seemed to be of interest to her. I once said, 'Oh, Elsie, you could have anything you want.' But she was happy with simple things. She just enjoyed her time being around the staff."

Elsie was 84 when she died.

"To my knowledge, she didn't have any relatives on her side. It was always just him and her."

# Community Fund misses \$300,000 goal

By Connie Cone Sexton  
Staff writer

SUN CITY — Last minute contributions helped push donations to the Sun City Community Fund \$10,000 closer to its fundraising target of \$300,000.

Community Fund members, who had feared being more than \$50,000 away from their mark, managed to raise about \$260,000, according to Eugene Wright, spokesman for the volunteer organization.

This is the third year the group, which provides financial assistance to needy Sun City residents and other local organizations, has fallen short of its goal.

It is disappointing but understandable, considering the aging population of the Sun Cities, Wright said, with many faithful donors having either died or moved away.

"We've got some problems with the changing population and also with so many organizations competing for charitable dollars," he said.

More than \$303,000 in requests were received by the board yet all but four organizations received some grant money, Wright said.

"Four requests were not awarded, not on a basis of need but for a lack of money," he said. "Some of the other organizations had to have their request amounts reduced."

Twenty-five area agencies were selected to receive a total of \$238,000 in grants, Wright said.

Of the \$22,000 remaining from the \$260,000 raised, \$12,000 was used to assist former Sun City residents living in the Good Shepherd Retirement Center. The other \$10,000 went to offset a previous shortfall in the Community Fund budget.

Grants do not have to be repaid, but Community Fund gives specifications on how the money can be spent, Wright said.

Because of the downturn in donations, the board members had to re-examine their award policy. Grants now are limited to individuals and those local non-profit

organizations that provide direct assistance to needy Sun City residents.

Agencies and their grants are as follows:

■ Sun Cities Area Community Council. \$37,000 to help operate the Olive Branch Senior Center and the Wake Up and Tuck In program.

■ Interfaith Services. \$35,000 to help operate its Sun City day care centers.

■ Volunteer Bureau of the Sun Cities. \$7,500 to support its program to recruit and direct volunteer workers to local support agencies.

■ Sun City Area Transit System. \$25,000 for its transportation service.

■ American Red Cross, Sun City Branch. \$20,000 for van transportation service to the handicapped and frail elderly.

■ Jewish Family Services. \$5,000 for its geriatric services on a non-denominational basis.

■ Westside Food Bank. \$12,000 for providing food assistance.

■ Sun City Library. \$20,000 for materials.

■ Salvation Army, Sun City Area Corps. \$15,000 for its various social services.

■ Palm's House. \$5,000 for its drug and alcohol rehabilitation program.

■ Sun Sounds. \$4,500 to provide closed-band broadcasts to the visually handicapped.

■ Hospice Services of the Sun Cities Area. \$5,000 for its program to aid the terminally ill.

■ Sun Health Home Care Service. \$1,000 to supply homemaking assistance to the handicapped and frail elderly.

■ Information and Referral Service of Sun City. \$17,000 to support work of Sun City volunteers who provide general information services to the community.

■ American Diabetes Association, Sun City Chapter. \$5,000 to provide educational and support services to diabetics.

■ Sun Valley Lodge. \$24,000 to help defray costs to maintain needy residents at the nursing home.

# Fund comes through

July 24/90

## Grants awarded despite shortfall

By TIFFANY MEANS  
Daily News-Sun staff

SUN CITY — Few grant requests to the Sun City Community Fund were denied or cut despite a shortfall of expected contributions, a fund official said.

The board of directors during a recent meeting reviewed 20 grant applications requesting more than \$303,000. Available grant resources totaled \$250,000, said Gene Wright, spokesman.

The organization had hoped to receive \$300,000 in contributions by the end of its fiscal year (June 30), Wright said. To date, contributions have totaled \$260,107. The group expects few contributions to be made in the last month.

Approval for grant requests was based on a policy made in March that limits grants to non-profit groups that directly aid Sun City residents, said Frank Corwin, president.

The policy also discontinues grants to national health organizations, with the exception of the American Diabetes Association, Corwin said.

According to policy, the Fund denied grant requests from the Dysart Community Center, Muscular Dystrophy Association and the Sun City Geneological Library, said Tom Englehardt, grants committee chairman.

Also according to the new See Fund, A5

## Fund awards grant requests

—From A1

policy, requests by Good Shepherd Retirement Center for former Sun City residents will be handled through the Fund's personal needs committee.

All other requests were approved through normal procedure, Wright said, although in a few cases the amount approved was less than the requested total:

- **Sun City Library** — The library requested \$20,000 of which \$10,000 had already been granted. The directors approved a supplemental \$10,000 grant.

- **West Side Food Bank** — The Bank requested \$12,000, of which \$6,000 had already been granted. The directors approved a \$6,000 supplemental grant designated to provide food supplies to Sun City residents.

- **American Red Cross** — The organization requested \$22,500. The directors approved a \$20,000 grant designated to provide transportation service to Sun City residents.

- **Volunteer Bureau of the Sun Cities** — The Bureau requested \$7,500, of which \$3,000 had already been granted. The directors approved a \$4,500 supplemental grant.

- **Salvation Army, Sun Cities Area Corps** — The directors approved the requested \$15,000 grant.

- **Sun Cities Area Interfaith Services** — The organization requested \$50,000, of which \$10,000 had already been granted. The board approved a \$25,000 supplemental grant.

- **Sun Cities Area Community Council** — The Council requested \$37,000, of which \$7,000 had already been granted. The directors approved a \$30,000 supplemental grant. The designation for the funds was split, with \$25,000 to be used for the Olive Branch Senior Center and \$12,000 to be used for the Wake-Up/Tuck-In service.

- **Sun Cities Area Transportation** — The agency requested \$25,000, of which \$10,000 had already been granted. The directors approved a \$15,000 supplemental grant.

- **Sun Sounds** — The organization requested \$4,368, of which \$2,000 had already been granted. The directors approved a \$2,500 supplemental grant.

- **Hospice of the Sun Cities** — The agency requested \$6,000. The directors approved a \$5,000 grant.

- **Sun Health Home Care Service** — The directors approved the requested \$1,000 grant.

- **Sun City Information and Referral Service** — The agency requested \$24,000, of which \$7,500 had already been granted. The directors approved a \$9,500 supplemental grant.

- **American Diabetes Association** — The organization requested \$5,000, which was approved for educational services in Sun City.

- **Sun Valley Lodge** — The directors approved the requested \$24,000.

# Helping out

## Community Fund hands out grants to civic organizations

By CHRISTINE SELIGA  
News-Sun staff

SUN CITY — The Sun City Community Fund gave away all its \$250,000 allotted this year for grants to community service organizations Tuesday afternoon.

Even better news is that the fund managed to squeeze out a grant for the Sun Cities Community Council Wake Up/Tuck In program, which had been in limbo because it ran out of money.

But four organizations have been given less than they received last year and the community fund board moved to have a committee study the most effective way to distribute grant money within the community to reach and benefit the largest number of residents. The board was particularly concerned with grant criteria when recommending grants to nursing homes and hospitals.

The fund collects donations from residents and then distributes them to community service organizations and personal needs cases.

The Wake Up/Tuck In program was a service of the community council. In it, people who needed help getting up or going to bed could contract with helpers who were trained by the council. The service gave people a little bit of help with their daily lives and allowed them to remain at home and independent.

The service stopped taking new referrals in March because it ran out of money from a one-time Valley of the Sun United Way grant. People who had already used the service still contracted with their helpers.

"This problem arose after our committee completed its deliberations," grants committee chairman Tom Engelhardt said.

The board moved to give the service a \$6,000 grant.

The fund gave initial grants to several of the organizations earlier in the year. The organizations and their total grants from the fund this year are the Sun City Library, \$20,000; Westside Food Bank, \$12,000; the Sun City Branch of the American Red Cross, \$20,000; Jewish

Family Services, \$4,000; Valley View Hospital, \$5,000; the Volunteer Bureau of the Sun Cities Area, \$8,500; the Salvation Army - Sun City Area Corps, \$14,500; the Sun Cities Area Interfaith Services, \$35,000; the Sun City Area Community Council, \$9,000; Wake Up/Tuck In, \$6,000; and the Good Shepherd Retirement Center, \$24,000.

Also, the Sun City Area Transit System received \$20,000; Pelm's House, \$5,000; Sun Sounds, \$4,000; Meals-on-Wheels of Sun City, \$1,000; Hospice Services of the Sun City Area, \$5,000; Sun Valley Lodge, \$24,000; Sun Health Home Care, \$12,000; Information and Referral Service of Sun City, \$15,000; American Diabetes Association - Sun City, \$5,000; and the Dysart Community Center, \$1,000.

The grants are usually distributed in June.

This was the first year Baptist Village in Youngtown applied for a grant from the fund. Baptist Village asked for \$25,000 but the fund elected not to grant the organization any money this year. It was the only organization that applied for a grant and received no money from the fund.

Baptist Village has two former Sun City residents who are indigent.

"With that limited number of former Sun City residents . . .

we felt that this situation warranted our deferral," Engelhardt said.

The fund gave grants to two other nursing home facilities to which it has given grants in the past. Sun Valley Lodge, which is located in Sun City and has only Sun City or former Sun City residents, received \$24,000. Good Shepherd Retirement Center is in Peoria and has many Sun City residents. It received \$24,000.

At the meeting the fund board voted to have a committee study the requirements for organizations receiving grants and whether nursing homes and hospitals should qualify for grants or if those organizations can be helped by other community resources.

Valley View Hospital, Interfaith Services, Information and Referral Service of Sun City and the Dysart Community Center received less money than they did last year from the fund.

The fund board discussed whether the Dysart Community Center in El Mirage should receive funds. The center does not directly benefit Sun City residents, although some volunteer at the center.

Fund treasurer Tom Cooper moved to not grant the center any money this year but the board voted against his motion. The board granted the center \$1,000. It received \$3,000 from the board last year and asked for \$5,000 this year.

Board member and grant application committee member Wendell H. Pierce said the Dysart Community Center issue and what organizations should receive fund grants were brought up in committee.

"I think this raises a question that was raised in committee. We have to re-define some of this and we have to do it without stepping on somebody's toes," Pierce said.

Board member Helen Vallee Erway suggested funds to the organizations not be cut off abruptly and the board should inform the center if it is its last year to receive funds from the board so the center can make other plans.

The board also reduced the amount it gave the Information and Referral Service of Sun City from \$20,000 last year to \$15,000 this year because the group has accumulated a \$20,000 reserve. The Community Fund is the service's main source of funds.

Engelhardt said the group has just been very economical with the money it gets from the fund.

"I guess we just didn't observe it (the reserve) or notice it last year," he said.

The fund reduced the amount it gave to Interfaith because of its increased independent fundraising efforts in Sun City and increase in grant money received for its programs from other organizations.

The grant application review committee recommended reduced funding for Valley View Community Hospital from \$7,000 last year to \$5,000 this year pending the study of how the fund should aid nursing homes and hospitals.

Four organizations that applied for grants last year didn't this year. They were the St. Vincent De Paul Society, Meals-On-Wheels, the Phoenix Symphony and the Multiple Sclerosis Society.

Of those organizations, the fund gave Meals-On-Wheels a \$1,000 grant. The grant is to cover any shortfalls the organization might have.

# Sun City fund comes to rescue of 'invisible poor' residents in area

By Steve Yozwiak  
Northwest Valley Bureau

SUN CITY — Perhaps this Thanksgiving Day, people here need not be more grateful for anything than each other.

Among the rows of finely painted houses and manicured desert-landscaped yards are the invisible poor — people who are most often the victims of unpredictable inflation and illness.

They were raised in a time when people were taught to take care of themselves.

Now, many of them are forced to reach out for help. And their pride makes this more difficult.

But just as native Americans gave food to Pilgrims until they could fend for themselves, the Sun City Community Fund for 17 years has provided some residents here with a way to help each other get back on their feet.

"Most people have the impression that we're all

millionaires," said Loren Ness, former president of the fund.

But many people moved here without adequate finances or insurance to deal with years of double-digit inflation and catastrophic illness, Ness said.

"These are people who probably came here in the early years (1960s) south of Grand Avenue," he said, although circumstances can bring down even those who are best prepared regardless of where they live.

"We have people here in Sun City who are trying to get by on \$500 a month, and it doesn't work. They need help — sometimes very desperately."

Marianne Brecher, chairman of the fund's personal-needs committee, said this year, the organization will give direct aid of as much as \$6,600 to more than 40 individuals or couples.

Brecher said it is impossible to determine what percentage of the needy here are receiving help.

"There are a lot of people in need who are too proud to accept help," she said.

Confidentiality is rigidly enforced, but Ness and Brecher cited several examples of people here in need of financial help. They include:

- A woman, abandoned by her husband, was forced to sell her car and much of her furniture in order to make her mortgage payments. "She really had no resources at all, and the worst part was that she had no medical insurance," Brecher said.

- A couple was faced with foreclosure because they were more than five months past due on their mortgage payments.

- A couple living on \$700 a month was forced to sell their home and rent in order to pay medical bills.

- A woman with cancer was too young to receive the Social Security benefits of her deceased husband and no longer was able to work because of her illness.

Many older people in nursing homes receive grants from the fund to help pay for their care because their Social Security payments are insufficient, Brecher said.

And many others are unable to make ends meet if Social Security payments are their only source of income, she said.

Ness said the pensions of many persons who retired in the 1960s also are insufficient to supplement their Social Security benefits.

Organization of the Sun City West Community Fund was completed in September and its president, Joe Kelso, said it helped its first needy family this month.

A couple barely getting by on Social Security and food stamps were hit with an unexpected medical expense, Kelso said.

"It just wiped out their savings," he said.

— Fund, Extra 13

Continued from Extra 1

Sun City West, only four years old, is generally considered more affluent than Sun City.

Although inflation has slowed this year, Kelso said record high inflation during the past four years also had a devastating effect on the financial planning for many retirees there.

Nearly \$260,000 was raised for the Sun City Community Fund last year, mostly through individual donations averaging about \$25, said Fred Bedford, fund president.

Ness said about \$60,000 will be used this year for personal needs, which is the fund's first priority.

He said the rest goes to several other community services, including: Meals on Wheels; Sunshine Service, a hospital-equipment-lending service; the Salvation Army; Handi-Capables; crisis counseling and day centers of Interfaith Services Inc.; an information and referral service; and local hospitals.

Through the years, Bedford said, the fund has helped "tens of thousands of people" here, either directly or indirectly.

In addition, Brecher said the donations by Sun City residents have found their way to food charities throughout the northwest Valley.

Bedford said the fund also donates money to several national disease-prevention societies.

"Because there are people here struggling with those diseases, we contribute towards research in those areas," he said.

Both the Sun City and Sun City West community funds are conducting annual fund-raising drives that began in October.

Bedford said the Sun City Community Fund has raised \$232,000 in its push to raise \$260,000 again by Dec. 31.

Kelso said the Sun City West Community Fund has raised \$22,000 in its effort to raise \$50,000 by Jan. 31.

"It's real encouraging," he said. "We're starting off from scratch. I think it's doing very, very well."



News-Sun photo by Stephen Cherek

**STACKS OF FOOD** — In the kitchen at Walter O. Boswell Memorial Hospital, where Meals on Wheels meals are prepared, Shirley Hrdlicka places some meals in insulated chests to keep them warm until they reach their destinations.

# Community Fund provides aid

By FRAN SMITH  
Staff Writer

That residents can become destitute in Sun City may surprise many people, but Margaret Campbell knows it's true.

Outgoing chairman of the needs committee of the Sun City Community Fund, she's heard the sad stories of dozens of victims of financial stress. Sun Citians are not widely known for poverty, certainly, but it exists here, and some of the worst cases have been aided by the Fund.

A proud woman in her 80s had been eating dog food, actually, when her plight came to the attention of the committee. "For weeks she hadn't had fresh milk or such luxuries as bananas. She had almost no money," Mrs. Campbell says. "We were able to help her with medical bills and food allowances."

IN THE COMMUNITY Fund's budget of \$145,000 is a \$30,000 pot that the committee taps as needs knock at the door. Requests handled there are those that don't qualify for assistance from the 26 other human service agencies helped by the Fund. The situations are mostly simply a lack of cash for necessities. The solutions are mostly

gifts or loans of cash.

The committee's guidelines provide for assistance for persons who are financially distressed "through no fault of their own." Health problems and medical bills are the most common reason for their predicaments, although other circumstances account for some of the situations.

A 62-year-old woman who suffered from arthritis developed a kidney condition for which she needed surgery and dialysis. Before her case was referred to the needs committee, she had wiped out her savings and run up a \$17,500 medical bill. The Kidney Foundation eventually began picking up charges, but the Community Fund's money got her out of a real emergency.

THERE IS WHAT Mrs. Campbell calls a "chasm" between the time many persons retire and semi-retire and move to this area from other parts of the country and the time they are covered by all of the benefits of Social Security, including Medicare. A long illness or injury that strikes during that "chasm" can be catastrophic.

One new Sun Citian had worked so hard to get his house in shape after moving here that he had a heart attack

and spent 31 days in intensive care. He was not yet on Medicare and because of his recent move could not get his private insurance plan transferred in time to help with his hospital and doctors' bills, which totaled \$30,000. He was "wiped out" financially in short order. The Community Fund came to his aid.

A "young" couple, in their 50s, moved to Sun City from back East, planning to continue working until they were old enough to retire. They couldn't find jobs, however, and soon were down to their last few dollars. "We came up with some money to provide a bridge until they could get some new sources of income," Mrs. Campbell said.

WHEN A NEED COMES to the committee's attention, at least two members investigate and together make a recommendation to the Community Fund's executive committee. The executive committee then decides whether to get involved, how much to get involved and how soon the case should come up for review. Only the needs committee members know who the applicants are, and strict confidentiality is promised.

Do deadbeats show up with their hands out?

Mrs. Campbell says that most Sun Citians have too much pride to ask for help unless they have really exhausted all of their own means.

ONE PROFESSIONAL man who retired early to a "beautiful house on the golf course" did get some help for a time because of medical bills, but when his case was reviewed, the committee ended its assistance. "He had not planned well," Mrs. Campbell said. "We thought that after four months, he could have put up that expensive home for sale, talked to his children about pitching in or at least done more to help himself."

Working for Macy's as a clerk and then supervisor for many years, Margaret Campbell learned a lot about dealing with people. She caught on to the technique of measuring carefully when to talk and when to listen.

So far, the \$30,000 per year in the needs committee budget has been sufficient. Inflation hits the poor harder than it hits anybody else, however, and the demand on the fund is expected to grow.

- **SUN CITY-YOUNGTOWN MEALS-ON-WHEELS**

Delivers hot and cold meals at cost direct to the home for shut-ins or invalids who are unable to prepare their own food: Operated entirely by volunteers. Community Fund grant covers meal costs for recipients unable to pay full charges. For more information call 974-9430.

- **SUNSHINE SERVICES, INC.**

A unique non-profit Sun City service that supplies sick room equipment without charge. For more information call 974-2561.

- **UNITED CEREBRAL PALSY ASSOCIATION —**

Maricopa County Chapter  
Provides community services for cerebral palsy patients, sponsors research and training, and supports an active service program for persons with cerebral palsy.

- **VISITING NURSE SERVICE**

Provides part-time rehabilitative home health services, such as nursing, therapy, speech pathology, medical social work counseling, and personal care. Service available to Sun City residents.

- **WALTER BOSWELL HOSPITAL FOUNDATION**

A financing agency for Boswell Memorial Hospital. Community Fund grant made for special equipment purchases.

- **WESTERN ACADEMY FOR BOYS**

A non-profit home for disadvantaged boys ages 13-18. Provides a program of individual counseling, group sessions, and development of home relationships.

- **WESTSIDE FOOD BANK — Glendale**

A non-profit service provides a central depository for food and clothing donated to it for redistribution to the needy. Many Sun City residents donate their time and energy in volunteer work at this warehouse.

- **MYASTHENIA GRAVIS FOUNDATION**

Provides information and assistance to those affected by, or having someone affected by a most insidious and crippling disease.

- **HOMEMAKER HOME HEALTH AIDE PROGRAM.**

Boswell Memorial Hospital  
Delivers service to those residents who require assistance after release from the hospital. Funds are used to cover costs of those who only can make partial payment for such services.

- **U.S.O.**

A voluntary civilian organization devoted solely to meeting the needs of American Service men and women and their families. To ensure the well-being and to improve morale of our service people away from home.

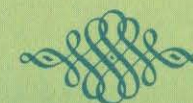
August 1, 1981

# SUN CITY COMMUNITY FUND INC.

977-0795

P.O. BOX 1355  
SUN CITY, ARIZONA 85372

Non profit services  
and agencies  
that your  
donations help





- **ASSISTING SUN CITIANS WHO HAVE PERSONAL NEEDS**

The Sun City Community Fund provides help to those residents of Sun City who, through no fault of their own, are in financial distress. This assistance is in the form of a direct grant, a temporary loan, or through the services of an agency to which the Fund has made a grant on their behalf.

Also the Fund makes controlled grants to local institutions specifically for use of Sun City Residents using these institutions, who are in financial need; such as —

- **SUN CITY-YOUNGTOWN DENTAL CLINIC**

A Clinic for the needy of Sun City and Youngtown. Staffed by retired dentists who contribute their time and skills. Community Fund grant provides dental materials and supplies.

- **SUN VALLEY LODGE**

A retirement home with skilled nursing care. Community Fund grants assist patients from Sun City who cannot pay all of their charges for care.

- **VALLEY VIEW COMMUNITY HOSPITAL AUXILIARY**

Sun City volunteers working with patients in the skilled nursing section use the funds to make them more comfortable.

- **AMERICAN NATIONAL RED CROSS — Sun City Chapter**

A national organization serving many needs. Specifically, for Sun City — provides transportation for essential purposes, conducts blood donor drives, teaches first aid techniques to Sheriffs Posse Volunteers and home nursing courses to anyone for the care and treatment of invalids.

- **ARTHRITIS FOUNDATION — Central Arizona Chapter**

An organization primarily for research into causes and cures for arthritis.

- **CYSTIC FIBROSIS FOUNDATION — Maricopa County Chapter**

Dedicated to research and medical care for children with lung damaging diseases.

- **DYSART COMMUNITY CENTER**

A public service group which sponsors 4-H Club groups, literacy classes, sewing classes, child care, and dental care for children. Sun City residents are volunteer workers on this project.

- **GOMPERS MEMORIAL REHABILITATION CENTER**

A rehabilitation center for the physically handicapped to enable the individual to return to a useful life.

- **LOST CHORD CLUB**

An organization for rehabilitation of those who have had vocal chords removed. Some Sun City residents are service participants.

- **MARICOPA COUNTY MENTAL HEALTH ASSOCIATION**

Devoted to better understanding, rehabilitation, counseling and psychiatric treatment for the mentally disabled.

- **MULTIPLE SCLEROSIS SOCIETY**

Primarily a non-profit research organization for causes and cures of this disease.

- **MUSCULAR DYSTROPHY ASSOCIATION**

Provides orthopedic supplies at no cost. Supports three clinics in Arizona. Conducts an international research program to find causes and cure. Conducts summer camps for afflicted children.

- **PELMS HOUSE, INC. — Peoria**

Resident rehabilitation center for treatment of male alcoholics. Sun City volunteers assist in the program.

- **RECORDED RECREATIONAL READING FOR THE BLIND — TALKING BOOK**

A volunteer group of Sun City residents who produce and distribute a weekly tape recorded report of community news and other recreational material for persons unable to read printed material, at no cost to users.

- **SUN CITY ART MUSEUM**

Successor of Sun City — Phoenix Art Museum provides free exhibits, lectures, and recitals. Provisions are made to accommodate handicapped by ramps and wide entrances. Many Sun City volunteers assist in maintaining and presenting activities of the museum.

- **ST. VINCENT DE PAUL'S DINING ROOM — Phoenix**

Provides free hot meals to needy men, women and children.

- **SUN CITY CHAPTER \* SALVATION ARMY**

For on-going programs in our Community.

- **SALVATION ARMY DINING ROOM**

Provides free hot meals to the unfortunate.

- **SUN CITY LIBRARY**

Grants to this non-profit organization for purchase of books. Reading is the only recreation possible for many invalids and shut-ins.

- **SUN CITY INFORMATION AND REFERRAL SERVICE**

An agency supported primarily by the Sun City Community Fund as the means to connect residents expressing a need with a suitable resource, with emphasis on emotional and physical adjustment problems of aging. Staffed by volunteers. For more information, including volunteer opportunities, call 974-6205.

## **SURROUNDING AREAS:**

### **Dysart Community Center**

The Center sponsors diverse programs including 4-H, Laubach Literacy, diet and health, industrial and homemaking education, arts and crafts and recreation. Many Sun City residents work as volunteers on these projects. Granted \$4,000.

### **Gompers Rehabilitation Center**

Although its main function is to supply clinical services to handicapped children and adults, Gompers is now working on a pilot program to furnish reconditioned hearing aids to needy Sun Citizens. Granted \$1,000.

### **Pelm's House**

The House is a community-based resident and out-patient facility for treating alcoholism and drug abuse. Sun City volunteers assist with the program. Granted \$7,000.

### **St. Vincent De Paul Society**

This widely known and effective welfare agency provides free hot meals and shelter to needy and homeless adults and children. It also offers counseling services and travelers' assistance. Granted \$7,000.

### **Sun Sounds**

Based at Rio Salado Community College, this is a free radio reading service available to all persons who are unable to read the printed page because of a visual or physical handicap. It provides special radio receivers on long term loan to qualified persons. Granted \$4,500.

### **Westside Food Bank**

The Bank was set up to combat hunger in the West Valley. It receives donated food and accepts cash contributions to purchase food for redistribution to the area's needy. Granted \$10,000.

## **COUNTY-STATE-NATIONAL NON-PROFIT ORGANIZATIONS**

The Fund also makes grants to certain state and national organizations which serve Sun City residents either directly or through research and education and who agree not to make door-to-door solicitations in Sun City.

### **American Diabetes Association**

Through counseling and education, assists diabetics to cope with the problem. Sponsors local support groups for diabetic children and adults. Granted \$5,000.

### **Jewish Social Services of Sun City/ Sun City West**

Offers individual and family counseling. Focuses on maintaining residents in their own homes for as long as possible and aids in making suitable transitions when necessary. Granted \$4,000.

### **Lost Chord Society of Arizona**

Offers speech training and rehabilitation to Sun City residents who have had their vocal chords removed. Granted \$4,000.

### **Multiple Sclerosis Society Central Arizona Chapter**

Sponsors a local support group and provides individual assistance to those affected by MS. Granted \$3,500.

### **Muscular Dystrophy Association**

Provides free orthopedic supplies, researches the causes and cures of the disease, supports clinics, and operated summer camps for afflicted children. Granted \$2,000.

## **ADDITIONAL SERVICES**

The Sun City Community Fund also maintains a **Contingency Account** of \$50,000 to be used for immediate relief of any disaster occurring in Sun City.

An **Endowment Account** is also available to receive bequests and memorials, with the income from these funds being dedicated to continuing support of purposes specified by the donors. At present the principal of this account is approximately \$85,000. Anyone wishing to contribute to this account should contact the President of the Fund.

**N**ow you can appreciate the many ways in which your contribution will be put to work by the Sun City Community Fund. And remember that 97 cents of every dollar contributed goes directly to work for the betterment of your community. In no other way can a single gift contribute so directly to the well-being of Sun City. Your contribution is vital. Please give generously.

# **SUN CITY COMMUNITY FUND INC.**

★ ★ ★

**P.O. BOX 1355  
SUN CITY, ARIZONA 85372**

**(602) 977-0795**

★ ★ ★

**A COMMUNITY RESPONSE  
TO THE  
HEALTH AND  
WELFARE NEEDS  
OF  
SUN CITY RESIDENTS**



**1987**

**Y**our Sun City Community Fund, founded in 1966, is a local non-profit organization which is primarily concerned with needs of Sun City residents. It is not affiliated with the Valley of the Sun United Way or any other fund. It complies with the guidelines for charitable organizations established by the Better Business Bureau of Maricopa County. The Fund has no paid employees and its operating expenses are approximately 3% of its income. An annual audit, available on request, confirms the expense ratio. Contributions are solicited from the Sun City Community in October of each year.

During the 1986-87 fiscal year the Fund's proceeds were distributed in the manner listed below.

★ ★ ★ ★

### **PERSONAL NEEDS DIRECT FINANCIAL ASSISTANCE TO INDIVIDUALS**

The Sun City Community Fund is unique in that, after careful investigation, it makes grants or loans directly to needy local residents. This service is strictly confidential so that no one need hesitate to seek aid. Assistance of this nature permits residents to remain independent and living in their own homes. Total assistance given was \$34,772.98.

### **FINANCIAL AID TO INDIVIDUALS THROUGH NON-PROFIT AGENCIES**

#### **Boswell Hospital Pro-Care Homemaker Program**

The program serves residents who require assistance in their homes. For many it permits an earlier return home after hospitalization. The Fund helps those who can make only partial payment for the services received. Granted \$3,000.

#### **Good Shepherd Retirement Center and Sun Valley Lodge**

These are local non-profit retirement homes with skilled nursing care facilities. The Fund makes grants to residents who are unable to pay all of the charges for their care. Granted \$24,000 to each home for making supplemental payments.

## **LOCAL NON-PROFIT ORGANIZATIONS**

### **SUN CITY:**

#### **Hospice Services of the Sun City Area**

Hospice has trained volunteers who provide free services to the terminally ill and their families. It exists to enhance the quality of life for these individuals by creating an atmosphere of love, understanding and service, and to aid families in caring for them at home. Granted \$5,000.

#### **Sun City Area Community Council**

The Council, composed of local non-profit organizations and churches as well as concerned individuals, studies the area's health and human service needs, recommends solutions, stimulates citizen involvement and helps in the coordination and development of services to meet community requirements. Granted \$8,000.

#### **Sun City Area Interfaith Services**

Interfaith operates local adult day care centers, provides crisis counseling and other services for the frail elderly and the lonely. Its basic goal is to develop a broad range of services to make it possible for residents to remain in their homes for as long as it is practical to do so. Granted \$36,000.

#### **Sun Cities Area Transit System (SCAT)**

SCAT provides both a prescheduled and a door-to-door Dial-A-Ride local transportation service for residents of Sun City, Sun City West and Youngtown. Wheelchair vans are available. Passengers are charged a token fee for each ride to help defray the cost of operation. Granted \$17,500.

#### **Sun City Information and Referral Service**

This service responds to telephone inquiries concerning community resources in such areas as health, education, recreation, social concerns and home maintenance. Problems are analyzed and suggestions are made. The caller may be referred to an appropriate agency. A followup is made to determine if adequate help has been received. Granted \$20,000.

### **Sun City Library**

Grants made to the Library are used to purchase books and tapes in recognition of the fact that reading is one of the few recreational activities possible for many of Sun City's elderly and shut-ins. Granted \$20,000.

### **Sun City Meals-on-Wheels**

This service, operated by local volunteers, delivers hot and cold meals to the homes of shut-ins and invalids who are not able to prepare their own food. Grants to this organization cover meal costs for recipients unable to pay full charges. Granted \$5,000.

### **Sun City Branch - American Red Cross**

The all-volunteer branch provides free wheelchair van service for handicapped and needy residents to and from local medical, shopping and recreational facilities in the Sun City area as well as to and from major medical facilities in Phoenix. It holds periodic blood drives, operates free blood pressure clinics, and its qualified instructors teach local classes in CPR, First Aid, Home Nursing and Disaster Training. Granted \$20,000.

### **Sun Cities Area Corps and Service Center - Salvation Army**

The Corps provides food and clothing to needy area residents and distributes surplus commodities to eligible residents under the United States Department of Agriculture program. Granted \$10,000.

### **Valley View Community Hospital - Continuing Education Series**

This program, open to all area residents, focuses on pertinent health issues through a series of live and video presentations offered throughout the year. Granted \$6,000.

### **Volunteer Bureau of the Sun Cities Area**

The Bureau helps to provide volunteer workers to non-profit agencies in health, welfare, recreational and educational fields by recruiting people wishing to volunteer and by referring them to agencies suitable to their abilities and wishes. Granted \$8,500.

*H. F. Martin*

April 1, 1966

*copies to: Prather - Martin - Lee*

MEMORANDUM TO:

Mr. Michael P. Bross, President, Sun City Home Owners Ass'n.

Mr. John W. Prather, Vice President, Sun City Home Owners Ass'n.

Attached is suggested procedure for our meeting of April 7 to organize the Sun City Community Fund. Until the Directors and Officers have been elected I think the meeting should be conducted by Messrs. Bross and Prather for the Home Owners Association.

Although I have discussed the proposed Fund with the heads of all the organizations listed, about one-half of those representatives shown have been delegated to attend the meeting and I'm not too sure just how much they have been informed by the heads of the organizations they represent. So, a brief explanation is necessary and I have tried to cover that in as brief time as possible in the attached order of business.

You will note <sup>one</sup> ~~three~~ blank spots on the list of names for Directors.

#11 ~~COPELAND~~ <sup>has</sup> ~~been~~ President. <sup>has</sup> ~~has~~ promised to send a representative.

#17 ~~\_\_\_\_\_~~ - Candidate for Director who will also serve as Secretary.

*DK*

~~Hope to have someone by date of meeting.~~

Will you please check the attached procedure when convenient? This is certainly subject to change as any of you see fit.

H. F. MARTIN

Copy to Dr. Harry P. Lee

April 1, 1966

TO - MR. MICHAEL P. BROSS  
MR. JOHN W. PRATHER  
COPY DR. HARRY P. LEE

SUBJECT - SUGGESTED PROCEDURE FOR MEETING OF APRIL 7, 1966  
TO ORGANIZE THE SUN CITY COMMUNITY FUND.

WELCOME  
AND  
INTRODUCTIONS

MARTIN - As long as I signed the postcard notices, I'll lead off by welcoming all of you to this meeting and saying that we appreciate your attendance. I feel that most of you know the President of our Home Owners Association, Mr. Michael P. Bross, and our Vice President, Mr. John Prather. Mr. Bross will act as Chairman of this meeting until the Board of Directors and officers of the new organization have been elected. Mr. William Gorton is here as a member of our Public Relations Committee. So that we all know who's who, I will introduce everyone present and state the organizations represented. (Hold up hands). In addition to representatives of some of our major organizations, it was thought advisable to also have a retired Doctor, a retired Lawyer, and a retired financial man on the first Board.

- ✓ 1. Eugene Hellberg, Sun City Civic Ass'n., Inc. (Community Center)
- ✓ 2. Rev. Charles Surber, Sun City-Youngtown Ministerial Assoc.
- ✓ 3. Glen Davis, Sun City Merchants Association
- ✓ 4. Chris Nelson, Sun City Men's Club
- ✓ 5. Mrs. Floyd Frederickson, Town Hall Senior Woman's League
- ✓ 6. Mrs. Homer Mack, Woman's Club of Sun City (Federated)
- ✓ 7. Rev. E. Duane Thistlethwaite, Sunshine Service, Inc.
- ✓ 8. Edward H. Kiessling, Men's Golf Association
- ✓ 9. Mrs. George Heath, Sun City Volunteers of Dysart Center *about*

Procedure for meeting of April 7, 1966 (Cont'd.)

- ✓ 10. Miss Nell Francis, <sup>R N</sup>~~Registered Nurses~~ Breakfast Club ✓
- ✓ 11. <sup>?</sup> , Women's Golf Association, North Div. *about*
- ✓ 12. *Mrs. Amos Whillock* , Women's Golf Association, South Div. ✓
- ✓ 13. Herbert F. Martin, Home Owners Association ✓
- ✓ 14. Dr. Harry P. Lee, as a retired Doctor ✓
- ✓ 15. Col. John L. Anderson, as a retired Lawyer. ✓
- ✓ 16. Harvey H. Spiegel, as a financial man. ✓
- ✓ 17. *Bess Peterson - Secretary* ✓

Mr. Bross will give you some background as to why we are here.

SON  
R  
EATING  
ED

BROSS - During the past 2 years, Sun City has been included in the Glendale United Fund Campaign and our residents have been solicited by mail. Organizations designated as recipients of the contributions are located in Phoenix, Glendale and Scottsdale. During this same period of time, members of our Home Owners Board have been asked by a number of our residents why someone doesn't sponsor the creation of a local Community fund so that the recipients could be designated by a Board of Directors from across our own community.

At the organization meeting of our new Board on January 5, Herb Martin was requested to co-ordinate the establishment of a committee across the community to consider the feasibility of such a Fund. Between this and our regular Board meeting of January 27, he met with the heads of several major organizations in Sun City and found such excellent support of the proposed plan that the Board voted unanimously to finance the incorporation of such a non-profit corporation and the first year's expense, on a loan basis. Since that time he has discussed the program with all the organizations which were read earlier and received the same enthusiastic support.

Procedure for meeting of April 7, 1966 (Cont'd.)

As you know, to create a non-profit corporation it is first necessary to elect not less than three nor more than 25 Directors, according to the statutes of the State. The articles of incorporation will be drawn by Allan K. Perry of Phoenix, who is the Home Owners Association lawyer.

So, as noted on the postcards mailed on March 26, we are here to conduct the election of a Board of Directors and Officers of the Sun City Community Fund to serve until the first annual meeting early next year. Each of the organizations contacted was asked to designate a member of the Board. The Fund will then be in a position to incorporate and will operate entirely independent of the Home Owners Association just as the Sunshine Service is now doing.

Mr. Prather will <sup>now</sup> outline the objectives of the Fund, how contributions may be obtained and who could be the recipients of the Fund.

OBJECTIVES  
OF  
FUND

PRATHER - The objective of the Sun City Community Fund is to represent the desires of the givers by co-ordinating their giving and manage monies donated to the Fund to care for and provide help, aid and assistance to the residents of Sun City who are in such need. I want to emphasize that this is the main reason for considering such a Fund, so that not only now but as our community grows, we will be in a position to help our own people who find themselves in real need.

In addition, the intent of the Sun City Community Fund policy is to be sufficiently broad so that maximum inclusiveness of acceptable voluntary non-profit health, welfare and recreational agencies of Maricopa County will be possible. To this end, the Community Fund will have the broadest possible "open door" policy for such agencies to participate and to receive funds in lieu of conducting separate campaigns.

Procedure for meeting of April 7, 1966 (Cont'd.)CONTRIBUTIONS  
TO  
FUND

Contributions will be requested by 2 methods:

1. Solicitations for individual contributions will be made by mail to residents, merchants, organizations and professional people in Sun City, and to merchants in Youngtown, Glendale and perhaps in Phoenix who do a considerable amount of business with our Sun City residents.
2. All clubs and organizations in Sun City should be advised of our new Fund and a suggestions made that some special event or program be sponsored by the clubs during our fall fund raising campaign from which we would receive at least part of the proceeds. A letter to this effect should be mailed as soon as possible because some club groups plan programs many months in advance.

RECIPIENTS  
OF  
FUND

In reference to the first objective of the Fund; that is, to help our own people, the recipients could be:

1. Sunshine Service - specifically for cash donations or loans to those residents of Sun City in dire need. Many such needs will be referred to Sunshine Service by Pastors of our churches.
2. Visiting Nurse Service of Phoenix - specifically to defray a portion of the expense for home health care (after 7/1) of those residents under 65 who have no funds to pay for such service. (Note - the cost to administer the home health care program for those over 65 will be at the expense of Medicare).
3. Sun Valley Lodge - specifically for Sun City patients in the infirmary who are unable to pay that portion of the charges not covered by Medicare or by insurance of their own. There may be cause to assist some in real need under 65.



SUN CITY COMMUNITY FUND  
April 1966

The Sun City Community Fund was created at a meeting on April 7, 1966 at 2:00 p.m. in the Community Center Lounge, 10725 Oakmont Dr., Sun City, Arizona. At that time, fifteen (15) directors, including the four (4) customary officers, were elected to serve until the first annual meeting of the Fund early next year. The Board of Directors voted to incorporate the organization as a voluntary non-profit corporation. Approval will be asked of the Internal Revenue Service to consider contributions to the Fund as an income tax deduction.

Elected Officers are:

President-----Dr. Harry P. Lee

Vice President--Rev. Charles A. ~~Suber~~ *Suber*

Secretary-----Mrs. Bess Peterson

Treasurer-----Harvey H. Spiegel

REASON FOR CREATING FUND

During the past 2 years, Sun City has been included in the Glendale United Fund Campaign and our residents have been solicited by mail. Organizations designated as recipients of the contributions are located in Phoenix, Glendale and Scottsdale. During this same period of time, members of the Home Owners Association Board have been asked by a number of our residents why someone doesn't sponsor the creation of a local community fund so that the recipients could be designated by a Board of Directors elected from across our own community.

At the organization meeting of the new Home Owners Board on Jan. 5, 1966, a member was requested to co-ordinate the establishment of a committee across the community to consider the feasibility of such a Fund. Between this and the regular Board meeting of January 27, 1966, he met with the heads of several major organizations in Sun City and found such excellent support of the proposed plan that the Board

voted unanimously to finance the incorporation of such a non-profit corporation and the first year's expense, on a loan basis. Since that time he has discussed the program with additional organizations and received the same enthusiastic support. The Fund will operate independently of the Sun City Home Owners Association.

#### OBJECTIVES OF FUND

The objective of the Sun City Community Fund is to represent the desires of the givers by co-ordinating their giving and manage monies donated to the Fund to care for and provide help, aid and assistance to the residents of Sun City who are in such need. I want to emphasize that this is the main reason for considering such a Fund, so that not only now but as our community grows, we will be in a position to help our own people who find themselves in real need.

In addition, the intent of the Sun City Community Fund policy is to be sufficiently broad so that maximum inclusiveness of acceptable voluntary non-profit health, welfare and recreational agencies of Maricopa County will be possible. To this end, the Community Fund will have the broadest possible "open door" policy for such agencies to participate and to receive funds in lieu of conducting separate campaigns.

#### CONTRIBUTIONS TO FUND

Contributions will be requested by two (2) methods:

1. Solicitations for individual contributions will be made by mail to residents, merchants, organizations and professional people in Sun City, and to merchants in Youngtown, Glendale and perhaps in Phoenix who do a considerable amount of business with our Sun City residents.

2. All clubs and organizations in Sun City will be advised of our new Fund and a suggestion made that some special event or program be sponsored by the clubs during our Fall fund raising campaign from which we would receive at least part of the proceeds. A letter to this effect will be mailed as soon as possible because some club

groups plan programs many months in advance.

#### RECIPIENTS OF FUND

In reference to the first objective of the Fund; that is, to help our own people, the recipients could be:

1. Sunshine Service - specifically for cash donations or loans to those residents of Sun City in dire need. Many such needs will be referred to Sunshine Service by Pastors of our churches.

2. Visiting Nurse Service of Phoenix - specifically to defray a portion of the expense for home health care (after 7/1) of those residents under 65 who have no funds to pay for such service. (NOTE- the cost to administer the home health care program for those over 65

3. Sun Valley Lodge - specifically for Sun City patients in the Infirmary who are unable to pay that portion of the charges not covered by Medicare or by insurance of their own. There may be cause to assist some in real need under 65.

4. Northwest Hospital and any other hospital - specifically for Sun City patients who are unable to pay that portion of the charges not covered by Medicare or by insurance of their own.

In respect to the second objective of the Fund, another recipient could be the Dysart Center which is now helped financially, to a degree, by some of our individual residents and organizations. Dysart Center has not been helped by the United Fund even though it is incorporated as a non-profit health and welfare organization.

Additional recipients could be any of the Health, Welfare and Recreational agencies of Maricopa County to whom allocations are now made by the United Fund. All recipients of the Fund will be determined by the Board of Directors.

April 13, 1966

Mr. Allan K. Perry,  
Perry, Coulter & Head,  
222 West Osborn Road,  
Phoenix, Arizona 85013

Re: Sun City Community Fund

Dear Mr. Perry:

This will refer to your letter of March 21 to Mr. H. F. Martin relative to the above subject. The copy of the Articles of Incorporation of Sunshine Service, Inc., which you enclosed was very helpful.

We will list the information requested in your letter and other data which may be of some value. All items have been approved by the new Board of Directors of the Fund.

1- The name of the corporation shall be Sun City Community Fund, Inc., and its principal place of business shall be at Sun City, Maricopa County, Arizona.

2- The names, residences and post office address of the incorporators are as follows:

Michael P. Bross-10701 Cherry Hills Drive W., Sun City, Arizona 85351

Mr. Harry P. Lee-10526 Connecticut Ave., Sun City, Arizona 85351

Herbert F. Martin-10837 Madison Drive, Sun City, Arizona 85351

3- The objective of the Sun City Community Fund is to represent the desires of the donors by co-ordinating their giving and manage monies donated to the Fund to care for and provide help, aid and assistance to the residents of Sun City who are in such need. The Fund will then be in a position not only now, but as our community grows, to help our own people who find themselves in real need.

In addition, the intent of the Sun City Community Fund policy is to be sufficiently broad so that maximum inclusiveness of acceptable voluntary non-profit health, welfare and recreational agencies of Maricopa County will be possible to this end; the Community Fund will have the broadest possible "open door" policy for such agencies to participate and to receive funds in lieu of conducting separate campaigns.

4- The annual meeting of the members of the Corporation will be held within 90 days of the end of the fiscal year (December 31), unless otherwise ordered by the Board of Directors, beginning with the year 1967. The directors shall hold office for the term of two years (one-half to be elected at each annual meeting). Officers shall hold office for the term of one year .

5- Officers and Directors noted below were elected at a duly called meeting on April 7, 1966 at 2:00 P.M. at the Community Center Lounge, 10725 Oakmont Drive, Sun City, to serve until the first annual meeting of the

members and their successors have been elected and qualified.

- Dr. Harry P. Lee - President and Director  
-10526 Connecticut Ave.,  
Sun City, Arizona 85351
- Rev. Charles A. Surber - Vice President and Director  
-11601 Capri Drive  
Sun City, Arizona 85351
- Mrs Bess Peterson - Secretary and Director  
-12436 Riviera Drive  
Sun City, Arizona 85351
- Harvey H. Spiegel - Treasurer and Director  
-10436 Snead Drive  
Sun City, Arizona 85351
- Col. John L. Anderson - Director  
-10232 Snead Circle So.,  
Sun City, Arizona 85351
- Glen B. Davis, Jr., - Director  
-165 La Cienega Ave, 38  
Goodyear, Arizona 85351
- Miss Nell Francis - Director  
-10642 103rd Ave.,  
Sun City, Arizona 8535
- Mrs Floyd Frederickson - Director  
-11607 103rd Ave.,  
Sun City, Arizona 85351
- Eugene H. Hellberg - Director  
-10418 Oakmont Drive  
Sun City, Arizona 85351
- Edward H. Kiessling - Director  
-10807 Oakmont Drive,  
Sun City, Arizona 85351
- Mrs. Homer Mack, - Director  
-10741 Abbott Ave.,  
Sun City, Arizona 85351
- Herbert F. Martin - Director  
-10837 Madison Drive,  
Sun City, Arizona 85351
- Chris Nelson - Director  
-10257 Snead Circle No.  
Sun City, Arizona 85351

Rev. E. Duane Thistlethwaite - Director

-10643 Oakmont Drive  
Sun City, Arizona 85351

Mrs. Amos Whitlock - Director

-11249 Coggins Drive  
Sun City, Arizona 85351

6-Highest amount of indebtedness or liability shall be \$10,000.00

7-Statutory Agent, Allan K. Perry

8- Publication of Article of Incorporation in a newspaper designated by Allan K. Perry

Since the Home Owners' Association sponsored the formation and incorporation of this new organization, we are requesting that you proceed to draft the Articles of Incorporation. Will you please send them to Dr. Harry P. Lee, whose address is shown above, for consideration of the Executive Committee of the Fund?

When the right time is reached in this entire procedure, will you please determine from the Internal Revenue Service if donations to our Fund will be considered as an income tax deduction?

Very truly yours,

*Michael P. Bross*

\*\*\*\*\*  
President  
Sun City Home Owners Ass'n

*orig to a Perry:*

*1 copy: Harry Lee*

*1 Copy: Herbert Martin*

*1 Copy: File - Bess Peterson*

SUN CITY COMMUNITY FUND, INC., SUN CITY, ARIZONA 85351

BY-LAWS Adopted July 21st. 1966

ARTICLE I. NAME

The Sun City Community Fund, Inc., for the purposes of these By-Laws shall be referred to as The Fund.

ARTICLE II. MEMBERSHIP

The Members of The Fund shall be:

(A) Individual Members. Each individual contributor to The Fund shall thereby become a member of The Fund and shall be entitled to vote at all meetings of The Fund for a period of one year immediately following his contribution. Every individual member is eligible to hold office in The Fund. Residents of Sun City, Arizona need not be members of The Fund to receive the benefits thereof.

(B) Participating Agency Members. Any voluntary, non-profit health, welfare or recreational agency in Maricopa County, Arizona, may upon approval of the Board of Directors of The Fund, become a participating agency member. No participating agency member shall be allowed to vote or to hold office in The Fund.

ARTICLE III. BOARD OF DIRECTORS

All of the affairs of The Fund shall be managed by the Board of Directors. The Board shall make a written report of its proceedings for the fiscal year at the Annual Meeting of The Fund. Any Director may succeed himself if duly nominated and elected. A nominee for membership of the Board of Directors must be a resident of Sun City, Arizona, or related to the community through his business or profession, and an individual member of The Fund.

Any Board Member absent from three consecutive meetings of the Board without sufficient reason shall automatically be declared removed from the Board. Reinstatement of such member may be made at the discretion of the Board. The Board shall have the power to fill all vacancies in the interim of annual meetings for the remainder of unexpired term. Composition of the Board of Directors, insofar as possible, the members of the Board shall be selected to represent a cross-section of the donors to The Fund and have broad interest in the objectives of The Fund. The persons nominated by the Nominating Committee to become members of the Board shall consist of those members of The Fund who, in the judgement of the Nominating Committee, have displayed that intelligence, ability and willingness to work on behalf of The Fund which is so necessary for the proper management of The Fund.

ARTICLE IV. OFFICERS

The Officers of The Fund shall be President, Vice President, Secretary and Treasurer. They shall be elected by the Board of Directors from its own number by written ballot at the first regular meeting of the Board of Directors following the Annual meeting. They shall take office immediately and serve for one year or until their successors have elected and qualified.

ARTICLE V. DUTIES OF OFFICERS

1. Duties of the President. The President shall preside at all meetings of the members of The Fund and of the Board of Directors. He shall vote only to break a tie. He shall appoint all standing and special committees, with the consent and approval of the Board of Directors and shall be an ex-officio member of all committees except the Nominating Committee. He shall <sup>call</sup> special meetings when he deems it necessary. The President shall, with either the Vice-President, Secretary or Treasurer, sign all notes, leases and contracts after approval by the Board. The President shall be eligible to succeed himself in office if duly nominated and elected.

2. Duties of the Vice-President. In the absence or inability of the President, the duties of that office shall devolve upon the Vice-President. He shall be eligible to succeed himself if duly nominated and elected.

3. Duties of the Secretary. The Secretary shall be responsible for keeping minutes of all meetings of the members of the Board, the Executive Committee and meetings of The Fund. He shall, with the President, sign notes, leases and other contracts after approval by the Board and shall perform such other duties as the Board may require. The Secretary shall be responsible for all correspondence after approval by the Board. The Secretary shall issue membership cards which will be mailed with receipt of donation, by the Treasurer. The Secretary may succeed himself in office if duly nominated and elected.

4. Duties of the Treasurer. The Treasurer shall have charge of the funds of The Fund and shall deposit all receipts to the account of The Fund in a bank designated by the Board of Directors. He shall pay all bills of The Fund by check upon certification of the account by the President or the Executive Committee. He shall be responsible for approved methods of accounting and at the close of the fiscal year shall have the books audited by a Certified Public Accountant approved by the Board and shall make such reports and perform such other duties as may be required by the Board. The Treasurer shall



record all donations to The Fund. He shall issue and mail receipts along with membership cards signed by the Secretary, to those who contribute to The Fund. The Treasurer shall be eligible to succeed himself in office if duly nominated and elected.

5. Checks. Checks must be signed by the President and the Treasurer, and if they are not available, by any two of the Officers.

6. Bond. At the expense of The Fund, the Officers shall be required to furnish bond with an approved Surety Company in the amount of Ten Thousand Dollars (\$10,000.00) to insure faithful performance of their duties.

#### ARTICLE VI. MEETINGS

1. Regular Meetings. The Annual Meeting of The Fund shall be conducted as noted in The Articles of Incorporation. In addition, reports shall be presented and any other necessary business transacted. The Board, or in case it does not act, the Executive Committee, shall fix the time and place for holding of each Annual Meeting. Meetings of the Board shall be held monthly, at a time and place designated by the Board.

2. Special Meetings. A Special Meeting of The Fund may be called by the President and shall be called in his absence or if he does not act by The Executive Committee on written request of (30) Thirty members of The Fund or at the written request of (7) Seven members of the Board.

3. Special meetings of the Board may be called by the President and shall be called by the Vice-President in the President's absence, or if he does not act, at the written request of (7) Seven members of the Board of Directors.

4. Notice of Meetings. Publication in the weekly local newspapers in Sun City, Arizona for a minimum of (3) consecutive weeks prior to each Annual Meeting of The Fund, and one (1) week prior to the regular Monthly Meeting of the Board shall be deemed sufficient notification of such Meetings. Publication in the weekly local newspapers in Sun City, Arizona for a period of three (3) consecutive weeks prior to any Special Meeting of The Fund shall be considered sufficient notification of any special meeting of The Fund. Special Meetings of the Board shall require notification by mail to each Member of The Board not less than ten (10) days prior to each Special Meeting.

#### ARTICLE VII. STANDING COMMITTEES

1. Types. The Board may create such standing committees as it deems will best promote the purposes of The Fund, among which shall be Executive, By-Laws, Campaign, Budget & Finance, Agency Relations and Community Relations.

2. Appointment. The Chairman of Standing Committees shall be appointed by the President, with approval of the Board, from the membership of The Fund or from the Board, to serve for one (1) year, or until a successor is appointed, unless otherwise provided by these By-Laws. Committee chairmen shall serve for not more than three (3) successive terms.

3. Attendance. A committee member absent from three (3) regular meetings in succession shall automatically be declared removed from the committee and the President shall appoint a member to fill the vacancy.

4. Executive Committee. The Executive Committee shall consist of the four (4) Officers of the Board with three (3) additional members of the Board appointed by the President for a term of one (1) year. Its duties shall be to supervise and direct the general routine work and administration of The Fund, subject to the approval of the Board. In any emergency it shall have all the powers of the Board, except that it shall not reverse any action of the Board. Any emergency action taken shall be reported promptly to the Board. The Executive Committee may call a regular or special meeting of The Fund or Board under the terms and conditions of these By-Laws. The Executive Committee shall meet pursuant to the call of the President, or upon the written call of any five (5) members thereof. A quorum of the Executive Committee shall consist of four (4) of its members, one of whom must be the President of the Board. Vacancies on the Executive Committee shall be filled by the Board. The Executive Committee shall meet at the call of the President.

5. Nominating Committee. A Nominating Committee of one (1) member of the Board and four (4) individual members of The Fund, not serving as members of the Board for the previous given year, shall be appointed by the President to serve one (1) year. The Committee shall elect its own Chairman. This committee shall prepare a list of nominees to be placed on the official ballot for the annual election of Directors of The Fund. One (1) name shall be presented for each vacancy to be filled and space shall be provided where additional names may be written in for nominations which may be made from the floor at the Annual Meeting of The Fund. Written consent of the nominee to serve, if elected, shall be obtained before the name is presented to The Fund. Nominations must be submitted in writing to the Board not less than one (1) month prior to the Annual Meeting of The Fund.

6. Budget and Finance Committee. The Budget and Finance Committee shall consist of not less than three (3) nor more than five (5) members of The Board and not more than five (5) members of The Fund at large, appointed by the President with the approval of The Board. The duties

(5)

of this Committee shall be to consider and make recommendations to the Board in regard to all matters pertaining to the funds for the purpose for which The Fund is established, in accordance with the Articles Of Incorporation.

7. By-Laws Committee. This Committee shall prepare the original By-Laws for consideration of the Board of Directors. It shall give further consideration to suggested amendments to the By-Laws to improve the organization and operation of The Fund.

8. Campaign Committee. This Committee shall consist of the Campaign Chairman, appointed by the President, the members of the Executive Committee and such other persons as may be designated by the Board from time to time. It shall have charge of the annual campaign for funds.

9. Community Relations Committee. This Committee shall consist of not more than three (3) members of the Board and five (5) members of The Fund at large. It shall have the duty of increasing the public understanding of the function of The Fund. ~~XXXXXXXX~~ This Committee shall serve as, and be, among other things, the public relations agency for The Fund. One member of the committee shall be designated to promote good relations with the Press.

10. Agency Relations Committee. This Committee shall consist of three members of the Board and five (5) members of The Fund at large, appointed by the Board. It shall have the duty of increasing agency relations and functions and shall be the clearing for all participating agency Members on behalf of the Board.

#### ARTICLE VIII. SPECIAL COMMITTEES

Special committees may be appointed by the President from time to time, as needed, for the proper administration of The Fund.

#### ARTICLE IX. FISCAL YEAR

The fiscal year of The Fund shall begin on the first day of January and end on the last day of December of each year.

#### ARTICLE X. QUORUM

One-third of the members of the Board shall constitute a quorum of the Board. All members present at the annual or special meetings of The Fund shall constitute a quorum.

#### ARTICLE XI. AMMENDMENTS

These By-Laws may be ammended at any regular meeting of the Board by a two-thirds (2/3) vote of all Directors, provided, however, written notice of the proposed ammendments has been given at a preceding regular meeting of the Board and all members of the Board are presented with, or mailed, a copy of the proposed ammendment for their consideration.

(8)

ARTICLE XII. SEAL

The seal of The Fund shall be in circular form with the words "SUN CITY COMMUNITY FUND, INC." on the circumference and the word "SEAL" in the center. The seal shall be kept and maintained by the Secretary of the Board.

ARTICLE XIII. PARLIAMENTARY AUTHORITY

"Roberts Rules of Order, Revised" shall be the parliamentary authority of The Fund.

ARIZONA CORPORATION COMMISSION  
INCORPORATION DIVISION  
NON-PROFIT

FILING FEE \$5.00

ANNUAL REPORT for fiscal year ending \_\_\_\_\_, 19\_\_\_\_

NAME OF CORPORATION Sun City Community Fund, Inc.

ADDRESS P. O. Box #236, Sun City, Arizona, 85351

OFFICERS	NAME	STREET	CITY-STATE	COMP. IF ANY
President	Harry P. Lee	10526 Connecticut Ave	Sun City, Ariz.	None
Vice-Pres.	Chas. A. Surber	11601 Capri Drive	Sun City, Ariz.	None
Secretary	Mrs. Bess Huron	12436 Riviera Drive	Sun City, Ariz.	None
Treasurer	Harvey H. Spiegel	10436 Sneed Drive	Sun City, Ariz.	None

BOARD OF DIRECTORS (If more than five attach separate sheet)

	John L. Anderson	10232 Sneed Circle S.	Sun City, Ariz.	None
	Mrs. Lee C. Bunker	10630 La Jolla Drive	Sun City, Ariz.	None
	Michael P. Bross	10701 Cherry Hills Dr.	Sun City, Ariz.	None
	Glen B. Davis Jr.	165 LaCienega	Goodyear, Ariz.	None
	Miss Nell Francis		Sun City, Ariz.	None

FINANCIAL STATEMENT

ASSETS		LIABILITIES	
<b>Current Assets:</b>		<b>Current Liabilities:</b>	
Cash on Hand	\$ None	Notes Payable	\$ None
Demand Deposits	\$ 2,335.04	Accts. Payable (trade)	\$ None
Inventories (_____) basis	\$ None	Accrued Liabilities	\$ None
Accts. Rec. (trade) net	\$ _____	Taxes and interest	\$ None
Notes Rec. (trade)	\$ _____	<b>Other Current Liabilities:</b>	\$ None
Other current assets:		Instalments due (in 1 yr.)	\$ None
Savings Acct.	\$ 5,058.71	Due Officers and Directors	\$ None
	\$ _____		\$ None
	\$ _____	<b>Long Term Debts.</b>	\$ None
<b>Fixed Assets</b>	\$ _____	<b>Reserves:</b>	
<b>Intangible Assets:</b>			\$ None
Goodwill	\$ None		
	\$ _____		
	\$ _____	<b>Other Liabilities:</b>	
<b>Other Assets:</b>			\$ None
Due from Officers and directors	\$ None		\$ None
	\$ 7,383.75		\$ None

FUND RAISING MEANS AND PROJECTS

Individual Donations	\$8,229.00	Organizing Expense	\$ 304.68
Sun City Clubs	\$ 1,572.81	Office supplies etc	833.11
Business Firms	\$ 765.00	Relief Cases	\$ 559.66
Savings Interest	\$ 10,615.52	Donations	\$ 1,534.32
Gross Receipts	\$ <del>20,566.33</del>	Expenses Incurred	\$ 3,231.77

STATE OF Arizona }  
COUNTY OF Maricopa } ss.

We, Harry P. Lee, President, and Bess Huron, Secretary, of the above-named corporation, do solemnly swear that the foregoing is a true, complete and correct statement to the best of our knowledge and belief, and have caused same to be prepared and delivered to the Arizona Corporation Commission.

Subscribed and sworn to before me this Jan. day of 1967, \_\_\_\_\_ President

My commission expires \_\_\_\_\_, 19\_\_\_\_, \_\_\_\_\_ Secretary

NOTARY SEAL \_\_\_\_\_ SIGNATURE \_\_\_\_\_ CORPORATE SEAL \_\_\_\_\_

IF POSSIBLE, PLEASE USE TYPEWRITER TO FILL REPORT. MAKE CHECKS PAYABLE AND SEND REPORT TO — ARIZONA CORPORATION COMMISSION, CAPITOL ANNEX, PHOENIX, ARIZONA FEE \$5.00

FOR OFFICE USE ONLY — DO NOT FILL IN THIS BOX

Filed in the office of the Arizona Corporation Commission, Incorporation Division \_\_\_\_\_, 19\_\_\_\_  
At request of \_\_\_\_\_ whose address is \_\_\_\_\_  
Filed by \_\_\_\_\_

18

## Cont. list of

Directors Sun City Community Fund, Inc.,	Sun City, Ariz.	Comp.
Mrs. Floyd Frederickson,	11607 103rd Ave.,	Sun City, Ariz. none
Eugene Hellberg,	10418 Oakmont Drive,	Sun City, Ariz. none
Edward H. Keissling,	10807 Oakmont Dr.,	Sun City, Ariz. none
Mrs. Homer Mack,	10741 Abbott Ave.,	Sun City, Ariz. none
Erwin S. Maurer,	10245 Sneed Cr. S.,	Sun City, Ariz. none
Herbert F. Martin,	10837 Madison Dr.,	Sun City, Ariz. none
Chris Nelson,	10257 Sneed Cr. N.,	Sun City, Ariz. none
Mrs. Raymond L. Nygren,	10774 Hope Drive,	Sun City, Ariz. none
E. Duane Thistlethwaite,	10643 Oakmont Drive,	Sun City, Ariz. none
Mrs. Amos Whitlock,	11249 Coggins Dr.,	Sun City, Ariz. none
Mrs. Roy W. Wolfgang,	11820 Capri,	Sun City, Ariz. none

T. "EDDIE" WILLIAMS, JR.  
CHAIRMAN  
NICK HERBERT  
COMMISSIONER  
MILTON J. HUSKY  
COMMISSIONER



GEORGE S. LIVERMORE  
EXECUTIVE SECRETARY

ARIZONA CORPORATION COMMISSION  
STATE CAPITOL ANNEX  
PHOENIX

December 1, 1967

Sun City Community Fund, Inc.  
P. O. Box 236  
Sun City, Arizona 85351

RE: NON-PROFIT ANNUAL REPORT

Gentlemen:

Fiscal date of above corporation being 12/31/67, an annual report fee of \$5.00 is due with the enclosed form properly executed. Please make check in correct amount as we have no way of making refunds.

The date of filing the annual report and paying the annual fee for each corporation shall be on or before the fifteenth day of the fourth month, (3 months & 15 days), after the close of the fiscal year adopted by the corporation for the purpose of Title 43 relating to TAXATION OF INCOME.

A penalty of 20% per month, or fraction thereof, of the fee due shall accrue until payment is made and annual report filed. Penalty at no time exceeds fee due.

REPORT MUST ACCOMPANY CHECK and be signed by proper officers and notarized. The enclosed report must be executed in full.

UPON REQUEST EXTENSION WILL BE GRANTED.

Very truly yours,

*May S. Oates*  
ARIZONA CORPORATION COMMISSION  
May S. Oates, Director of Incorporating

20

MSO/sr  
Enclosure

ARIZONA CORPORATION COMMISSION  
INCORPORATION DIVISION  
NON-PROFIT

FILING FEE \$5.00

ANNUAL REPORT for fiscal year ending December 21, 19 67  
NAME OF CORPORATION Sun City Community Fund, Inc.  
ADDRESS 404 236, Sun City, Arizona 85351

OFFICERS	NAME	STREET	CITY-STATE	COMP. IF ANY
President	Dr. Harry P. Lee	10126 Cambridge Ave	Sun City, Ariz.	
Vice-Pres.	Rev. Charles H. Suter	11608 Capri Drive	"	
Secretary	Rev. Ross P. Morgan	12436 Lyriana Drive	"	
Treasurer	Herbert F. Morgan	10137 Madison Drive	"	

BOARD OF DIRECTORS (If more than five attach separate sheet)

see attached sheet				
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FINANCIAL STATEMENT

ASSETS		LIABILITIES	
<b>Current Assets:</b>		<b>Current Liabilities:</b>	
Cash on Hand	\$ 10,123.81	Notes Payable	\$
Demand Deposits	\$	Accts. Payable (trade)	\$
Inventories (basis)	\$	Accrued Liabilities	\$
Accts. Rec. (trade) net	\$	Taxes and interest	\$
Notes Rec. (trade)	\$	<b>Other Current Liabilities:</b>	\$
Other current assets:	\$	Instalments due (in 1 yr.)	\$
	\$	Due Officers and Directors	\$
	\$		\$
<b>Fixed Assets</b>	\$	<b>Long Term Debts.</b>	\$
<b>Intangible Assets:</b>	\$	<b>Reserves:</b>	\$
Goodwill	\$		\$
	\$		\$
	\$		\$
<b>Other Assets:</b>	\$	<b>Other Liabilities:</b>	\$
Due from Officers and directors	\$		\$
	\$		\$
	\$		\$

FUND RAISING MEANS AND PROJECTS

Letter of solicitation	\$	Postage	\$ 215.00
	\$	Printed material	\$ 388.58
	\$		\$
	\$		\$
Gross Receipts \$	8,832.-	Expenses Incurred \$	603.58

STATE OF Arizona }  
COUNTY OF Maricopa } ss.

We, Harry P. Lee, President, and Ross P. Morgan, Secretary, of the above-named corporation, do solemnly swear that the foregoing is a true, complete and correct statement to the best of our knowledge and belief, and have caused same to be prepared and delivered to the Arizona Corporation Commission.

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, 19\_\_\_\_ President  
My commission expires \_\_\_\_\_, 19\_\_\_\_ Secretary  
NOTARY SEAL \_\_\_\_\_ Signature \_\_\_\_\_ CORPORATE SEAL

IF POSSIBLE, PLEASE USE TYPEWRITER TO FILL REPORT. MAKE CHECKS PAYABLE AND SEND REPORT TO — ARIZONA CORPORATION COMMISSION, CAPITOL ANNEX, PHOENIX, ARIZONA FEE \$5.00

FOR OFFICE USE ONLY — DO NOT FILL IN THIS BOX

Filed in the office of the Arizona Corporation Commission, Incorporation Division \_\_\_\_\_, 19\_\_\_\_  
At request of \_\_\_\_\_ whose address is \_\_\_\_\_  
Filed by \_\_\_\_\_



1970  
Sep 4 1970

# STATE OF ARIZONA

## Corporation Commission



*Original in  
Safety Deposit box*

To all to Whom these Presents shall Come, Greeting:

BE IT KNOWN THAT SUN CITY COMMUNITY FUND, INC.

HAVING SUBMITTED TO THE ARIZONA CORPORATION COMMISSION EVIDENCE OF COMPLIANCE WITH THE LAWS OF THE STATE OF ARIZONA GOVERNING THE INCORPORATION OF COMPANIES, IS, BY VIRTUE OF THE POWER VESTED IN THE COMMISSION UNDER THE CONSTITUTION AND THE LAWS OF THE STATE OF ARIZONA, HEREBY GRANTED THIS

### CERTIFICATE OF INCORPORATION

AUTHORIZING SAID COMPANY TO EXERCISE THE FUNCTIONS OF A CORPORATION, UNDER THE LAWS NOW IN EFFECT IN THE STATE OF ARIZONA, AND SUBJECT TO SUCH LAWS AS MAY HEREAFTER BE ENACTED, FOR A PERIOD OF TWENTY-FIVE YEARS FROM THE DATE HEREOF, UNLESS SOONER REVOKED BY AUTHORITY OF LAW.

BY ORDER OF THE ARIZONA CORPORATION COMMISSION.

*In Witness Whereof*, I, MILTON J. HUSKY

THE CHAIRMAN, HAVE HEREUNTO SET MY HAND AND CAUSED THE OFFICIAL SEAL OF THE ARIZONA CORPORATION COMMISSION TO BE AFFIXED AT THE CAPITOL, IN THE CITY OF PHOENIX, THIS 9th DAY OF May A. D. 1966

*Milton J. Husky*  
CHAIRMAN.



ATTEST:

*Georg B. Lerman*

SECRETARY.

NO. 68972

BY

ASSISTANT SECRETARY.

# STATE OF ARIZONA



## Corporation Commission



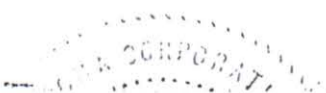
To all to Whom these Presents shall Come, Greeting;

I, GEORGE S. LIVERMORE, \_\_\_\_\_ SECRETARY OF THE ARIZONA CORPORATION COMMISSION, DO HEREBY CERTIFY THAT the annexed is a true and complete copy of the ARTICLES OF INCORPORATION of SUN CITY COMMUNITY FUND, INC.

which were filed in the office of the Arizona Corporation Commission on the 9th day of May, 1966, as provided by law. \_\_\_\_\_

IN WITNESS WHEREOF, I HAVE HEREUNTO SET MY HAND AND AFFIXED THE OFFICIAL SEAL OF THE ARIZONA CORPORATION COMMISSION, AT THE CAPITOL, IN THE CITY OF PHOENIX, THIS 9th DAY OF May A. D. 1966

BY *George S. Livermore* SECRETARY,



# SUN CITY COMMUNITY FUND, INC.

ROOM M-2 Oakmont Recreation Center  
10725 Oakmont Drive  
PHONE: 977-0795

"UNITED, WE HELP OUR OWN."

Mailing Address:  
POST OFFICE BOX 236  
SUN CITY, ARIZONA 85351

**President**  
Clifford W. Jensen

**Vice-President**  
Walter T. Grubb

**Secretary**  
J. Stewart George

**Treasurer**  
Glenn I. Park

**Board of Directors**

- Clarice A. Bouton
- Margaret P. Campbell
- Wayne D. Chubb
- Warren A. Donaldson
- J. Stewart George
- Orrie E. Gookins
- Dr. Harold Gries
- Walter T. Grubb
- Clifford W. Jensen
- Marcia T. Keith
- Walter J. McKane
- Herbert F. Martin
- Leverett H. Nichols
- Margaret Nygren
- Cleo F. Oliver
- Mel Osburn
- Glenn I. Park
- Kenneth A. Pearce
- John O. Rames
- Ed B. Sherburne
- Rex E. Staley
- W. Lowell Treaster
- Paul Waltz
- Stanley M. Woodhead

**Executive Committee,**

**The Officers and:**

- Clarice A. Bouton
- Walter McKane
- Kenneth A. Pearce
- Rex E. Staley
- W. Lowell Treaster

*Oct. 1976*  
*(W.D. - 5/23/76)*  
*To be acted on at*  
*10-17 mtg.*

Proposed amendments in the By-Laws, submitted to the Board of Directors, October 15, 1976, for their consideration.

### Article II

Paragraph 3. Any funds in excess of those needed for the above purposes may be donated to other non-profit charitable, educational, civic and philanthropic agencies.

### Article III

The members of the Fund shall be those individuals who contribute to the Fund. Each member shall be entitled to vote at all meetings of the Fund, during the year immediately following their contribution.

### Article VI

Duties of the President. Last sentence - delete the word "only".

*Warren A. Donaldson*  
Warren A. Donaldson  
Chairman  
By-Laws Committee

# SUN CITY COMMUNITY FUND, INC.

PHONE: 977-0795

"UNITED, WE HELP OUR OWN."

Mailing Address:

POST OFFICE BOX ~~236~~  
SUN CITY, ARIZONA 85372

February, 1978

## WHAT IS THE SUN CITY COMMUNITY FUND, INC?

BY

HERBERT F. MARTIN

I was a member of the Sun City Home Owners Board which was already in existence in October of 1966. At that time, it was brought to the attention of that Board, that there were individuals in Sun City who were in financial need; a condition which could be expected when a number of residents were living on Social Security, pensions and savings. Any sudden catastrophe such as a serious accident or a prolonged illness might rapidly deplete one's resources to the point where help might be needed. Youngtown had a relief fund of this type and the Home Owners Board felt that Sun City could use such a fund.

Shortly after Christmas, telephone calls were made to and by friends who had agreed with the Phoenix United Fund to canvass their neighborhoods in Sun City to solicit donations for National Health and Welfare organizations included in the Phoenix campaigns. At that time, many of our residents resented such operations and asked if the Home Owners Board could do anything to stop such solicitations. The Board agreed to have a delegation of its members meet the Director of the Phoenix United Fund to learn how its annual fund raising was conducted. The President of the Home Owners Association, who, at that time, was Dr. Harry Lee appointed Michael Bross and myself to meet with the Director of the Phoenix United Fund. The three of us are still residents of Sun City.

Having made an appointment to meet with the Director, Mike Bross and myself explained that we proposed to establish an organization in Sun City to collect and manage a fund to assist residents of Sun City who might be in financial need. The Assistant Director who sat in the meeting said "You can't do that, it's illegal". The Director at once answered "The people in Sun City can organize any group they want as long as it does not violate any State regulations". From then on, the Assistant Director was quiet. During all of our conversation at his office, the Director of the Phoenix United Fund was most cordial and helpful. In fact, he provided us with all printed material to assist the Home Owners Board in establishing a local organization, which at that time was unnamed. The two members of the Home Owners reported their discussion with the United Fund Director at the next Board meeting. Up to that time no one had any idea what a new organization in Sun City would be called or how funds would be accumulated to assist any Sun City people in financial need.

At the request of the President of the Home Owners Association, chairmen of each of the 18 larger Sun City recreational organizations met several times with members of the Home Owners Board to discuss the creation of a new organization. All were in favor.

# SUN CITY COMMUNITY FUND, INC.

PHONE: 977-0795

"UNITED, WE HELP OUR OWN."

Mailing Address:

POST OFFICE BOX 236  
SUN CITY, ARIZONA 85372

On April 17, 1966, representatives of these organizations along with members of the Home Owners Board held a joint meeting and formed the SUN CITY COMMUNITY FUND, INC. I have no idea which member of the Home Owners Board or of the delegated group suggested the name of the new organization. Fifteen Directors were elected including the usual officers. At a later date, in order to give a wider representation, the number was increased to twenty-five. The Home Owners Board of Directors voted an appropriate sum from its own Treasury to establish the new organization.

On May 9, 1966 the FUND received its Certificate of Incorporation from the State of Arizona as a non-profit health and welfare organization, and on August 15, 1966 the Internal Revenue Service ruled that donations to the FUND were income tax deductible.

The first objective of the SUN CITY COMMUNITY FUND, INC. has been to accumulate a sufficient amount of money to help our own people in Sun City who find themselves in financial need and to be able to handle such a problem as quickly as possible through the FUND governed entirely by a local Board of Directors.

The second objective has been to lessen door to door and mail solicitations by many charitable organizations, by making an arrangement with such organizations, to give a certain amount from our FUND in lieu of their drive in Sun City.

The third objective has been that any funds in excess of those needed for the first two purposes may be donated to other non-profit charitable, educational, civic and philanthropic agencies.

The SUN CITY COMMUNITY FUND, INC. is a purely local organization in Sun City, Arizona. It has no connection whatever, with the United Fund of Glendale or the United Way of Phoenix.