

2015 Summer Forum Steering Committee  
Meeting Notes: February 13<sup>th</sup> at 9:30am

**Committee members**

Attending	Committee Members (continued engagement)	SF Committee Focus	Organization	Email/Phone	Collaborate
Yes	Adele Dietrich	2015 Event Chair, AFP liaison	Arizona Community Foundation	<a href="mailto:ADietrich@azfoundation.org">ADietrich@azfoundation.org</a> 602-682-2025	SF Cmmttee, AFP
		2015 Event vice chair			
	Russ Goldstein	PGRTAZ President	US Trust Bank of America	<a href="mailto:Russell.goldstein@ustrust.com">Russell.goldstein@ustrust.com</a> 602-523-2924	Board
	Peter Leifer	PGRTAZ Program Committee Representative	ValuesQuest	<a href="mailto:peter@valuesquest.com">peter@valuesquest.com</a> 602-765-2224	Monthly Meetings
Yes	Adele Dietrich	Program Planning-chair	Arizona Community Foundation	<a href="mailto:ADietrich@azfoundation.org">ADietrich@azfoundation.org</a> 602-682-2025	Monthly Meetings
		Program Planning – vice chair			Monthly meetings
Yes	Chris Sar	Program Planning	Phoenix Children’s Hospital Fdtn	<a href="mailto:csar@phoenixchildrens.com">csar@phoenixchildrens.com</a> 602-933-2670/480-2620-6785	Monthly meetings
	Mallary Tytel	Program Planning	Healthy Workplaces	<a href="mailto:mallary@simplerulesfoundation.org">mallary@simplerulesfoundation.org</a> 860-874-7137	Monthly meetings
	Monica Malhotra	Program Planning		<a href="mailto:mmalhotra@suffolk.edu">mmalhotra@suffolk.edu</a>	Monthly meetings
Yes	Diane Jezek-Powell	Sponsorships Chair	Gomper’s Habilitation Center	<a href="mailto:Djezek-powell@gomperscenter.org">Djezek-powell@gomperscenter.org</a> 602-283-3931	
		Sponsorships- Co-chair			
RSVP	Tiffany House	Sponsorships	MasterTech Financial	<a href="mailto:tiffany@mastertechfinancial.com">tiffany@mastertechfinancial.com</a> 480-905-3260 480-242-9956	
		Sponsorships			
Yes	Lindsey Jackson	Communications/Messaging/PR /Social Media	BMO Harris Bank	<a href="mailto:Lindsey.jackson@bmo.com">Lindsey.jackson@bmo.com</a> 480-348-7722	Marketing Collaborators
		Communications/Messaging/PR /Social Media			Phoenix Fashion Week
		Community Lounge			Sponsorships
	Sierra Kamela	Marketing Collaborators	Hacienda Health Care	<a href="mailto:skamela@haciendainc.org">skamela@haciendainc.org</a> 602-243-4231 X176	Programs
Yes	Tiffany House	Membership	MasterTech Financial	<a href="mailto:tiffany@mastertechfinancial.com">tiffany@mastertechfinancial.com</a> 480-905-3260 480-242-9956	
	Nicole Powers	End of Day giveaways, 50/50 Raffle Nicole solicits item donations from organizations for the event day giveaways. These items are sent to Premium Organization’s office for packaging	Make a Wish Foundation	<a href="mailto:npowers@wish.org">npowers@wish.org</a> 602-792-3249	All committees
Yes	Stephanie Weadock	Event Day Volunteers	Premium Organization	<a href="mailto:info@pgrtaz.org">info@pgrtaz.org</a> 602-840-2900	Membership
	Melissa Kemp	Sustainability and Learner Centric emphasis	Premium Organization	<a href="mailto:melissa@premiumorganization.com">melissa@premiumorganization.com</a> 602-840-2900	

Link to recording of the call:

[http://apps.calliflower.com/recording/download/67249?rec\\_key=a741d6abcd1d06f70f5fc4f2d5fccdb219ba5668](http://apps.calliflower.com/recording/download/67249?rec_key=a741d6abcd1d06f70f5fc4f2d5fccdb219ba5668)

**Adele called the meeting to order and conducted an opening round.**

**Board consent to SF budget and setting board event goals (Stephanie)**

The proposed budget and board metrics were presented to the PGRTAZ board at their January board meeting. The budget and proposed metrics were approved/adopted as presented.

Stephanie	Present budget* to board and request board event goals*	Done
-----------	---------------------------------------------------------	------

**Programs\* (Chris Sar)**

The committee is hoping the progress in programs will help sell sponsorships. Track titles and descriptions are confirmed. All Plenary and breakout presenters are on the table for outreach/confirming.

The latest programs committee notes were posted with this call’s agenda and will be made part of these notes as exhibit A for reference as needed.

**Practical Applications for Planned Gifts-What’s Working Now?**

“These sessions will address issues that go beyond the techniques of planning. As planning and charitable giving become more complex and strategic, consider who else should be “at the table” to serve your client/donor for a secure, successful, and fulfilling future”

Stephanie	Provide sponsorship committee confirmed track titles and descriptions and the confirmed speaker/topics once solidified	As available
-----------	------------------------------------------------------------------------------------------------------------------------	--------------

**Board/CEO/Staff**

“CEO’s, ED’s and Board Chairs have a unique position in furthering a non-profit’s mission. These sessions speak specifically to the roles that each play in advancing the organization’s mission through their networks and by providing the structure for success”

Taryl Hansen will be invited back for the closing plenary. It was noted having her capture the closing plenary presentation may be challenging if not structured and enough time. Stephanie will address this with Taryl.

Stephanie	Address possible challenge with capturing closing plenary presentation within timeframe.	3/13/2015
-----------	------------------------------------------------------------------------------------------	-----------

**Sponsorships\* (Diane Jezek-Powell)**

Diane has consolidated the renew/new outreach list into one. This list will be made part of these notes as exhibit B for reference as needed. All were encouraged to review the list and offer any information and/or assistance with reaching out as applicable. 5k still open. Word out to Russ for Blackbaud or Cresendo. Also reached out to Sun Health for the 5k. All plenaries sold. One breakout sold to the board. One proceedings and one AV sponsorship sold. Half of a scholarship sponsorship sold to AHA. Hoping ACS comes in. KJZZ/KBACH on as media, Goodwill on for community lounge, St Joseph’s for print, Save the Date out on the street. Outreach is tailored to be very personal and thoughtful. List goal is to build a strong tool to use year over year for efficiency.

Russ	Connect with Diane for assistance in writing a grant	12/2014
------	------------------------------------------------------	---------

**Community Lounge (Stephanie)**

Contact at the retail store has been received. Adele will reach out to them for introductions, inquire if a PGRTAZ representative is required to visit the store to help pick out furnishings, etc., and to advise Rob Roth with PCC will be in direct contact with them for pick up, delivery, and take away of the furnishings.

**Target Dates**

Sponsor renewal invites out	Done	Outreach invite to Collaborators for 2014	2/2/15	Standard Registration Ends	5/29/15
Board basic OK: budget/goals	Done	Confirm Collaborators: start Press Releases	2/13/15	Assemble Conf Book Name Tags/Flash Drives	6/2/15
Budget/Goals: Committee OK	Done	Bundled Registration Opens	3/2/15	Community Lounge Materials at PCC	6/2/15
Begin work on look/feel graphic options	Done	Early Bird Opens	3/2/15	Summer Forum	6/3/15
Mass Sponsorship Appeal out	Done	Deadline for Ads and all other proceedings book content	5/8/15	Committee De Brief	6/19/15
Save the Date Notice posted to website and ready to go to print	Done	All proceedings book content to graphic designer for layout	5/11/15		
Best Possible Visibility and PR	Done	Early Bird Closes	5/15/15		
Coordinated sponsorship follow up	1/5/15-1/31/15	Standard Reg. Opens	5/16/15		
Settle on program topics/list of headliners	Done	Proceeding Book to Printer	5/18/15		
All Speakers desired INVITED	1/23/15	Final Speaker Outlines Turned In	5/20/15		
Headliners; breakout speakers Booked and confirmed	1/31/15	Speaker Flash Drives ordered	5/22/15		

**A closing round was conducted and the call was adjourned at 10:11am.**

**2015 Summer Forum \_Programs Committee Meeting Agenda  
February 12, 2015**

**Committee members**

<b>Attend ed</b>	<b>Committee Members (continued engagement)</b>	<b>SF Committee Focus</b>	<b>Organization</b>	<b>Email/Phone</b>	<b>Collaborate</b>
Yes	<a href="#">Adele Dietrich</a>	Program Planning-chair	Arizona Community Foundation	<a href="mailto:ADietrich@azfoundation.org">ADietrich@azfoundation.org</a> 602-682-2025	Monthly Meetings
No	<a href="#">Russ Goldstein</a>	PGRTAZ President	US Trust Bank of America	<a href="mailto:Russell.goldstein@ustrust.com">Russell.goldstein@ustrust.com</a> 602-523-2924	Board
No	<a href="#">Peter Leifer</a>	PGRTAZ Program Committee Representative	ValuesQuest	<a href="mailto:peter@valuesquest.com">peter@valuesquest.com</a> 602-765-2224	Monthly Meetings
		Program Planning – vice chair			Monthly meetings
Yes	<a href="#">Chris Sar</a>	Program Planning	Phoenix Children’s Hospital Fdtn	<a href="mailto:csar@phoenixchildrens.com">csar@phoenixchildrens.com</a> 602-933-2678/480-620-6785	Monthly meetings
Yes	<a href="#">Mallary Tytel</a>	Program Planning	Healthy Workplaces	<a href="mailto:mallary@simplerulesfoundation.org">mallary@simplerulesfoundation.org</a> 860-874-7137	Monthly meetings
Yes	<a href="#">Monica Malhotra</a>	Program Planning		<a href="mailto:mmalhotra@suffolk.edu">mmalhotra@suffolk.edu</a>	Monthly meetings
Yes	<a href="#">Stephanie Weadock</a>	Administrative Support	Premium Organization	<a href="mailto:info@pgrtaz.org">info@pgrtaz.org</a> 602-840-2900	All committees

<b>Responsible Party</b>	<b>Action Item</b>	<b>Target Due Date</b>
Stephanie	Incorporate a “which sessions are you most likely to attend” field in the registration process	2/2015
Adele	Reach out to PGRTAZ board and secure board members for the closing plenary presentation and advise of structure to include KJZZ/K-BACH	2/19/2015
All	Collaboratively draft/agree upon track content descriptions	2/2015
Adele	Connect with Greg Bodine for presenting two sessions (AM2 and PM1) on CGAs in the PGE track	2/19/2015
Peter	Solicit speakers for the Practical Applications track: Phil Cubeta & ??	2/19/2015
Chris	Confirm with Ronald Wilson if Linda Bowers is the one he was referencing to possibly present and communicate the finding to Peter and Adele-Katie Hill	Done
Peter/Adele	Connect with Linda Bowers for possibly presenting	Done
Russ	Advise on structure/vision for Board/ED/Staff track	Done
Adele	Confirm with Russ on the structure/vision/speakers for Board/Ed/Staff Track	Done
Adele	Send out a list of topics presented by Chris Looney	Done
Adele	Follow up with Tiffany on a possible motivational Breakfast plenary presenter	Done
Adele	Propose lunch plenary speakers	Done
Adele	Connect with Pamela Jett for presenting in the breakfast plenary	2/19/2015
Chris	Connect with Cathy Sheffield for presenting in the first session of the PGE track and the lunch plenary	2/19/2015
Stephanie	Forward dynamic governance cheat sheet to all	2/2015
Adele	Communicate to Peter the committees preferred session content for the PA track	2/2015
Stephanie	Connect with Taryl Hansen for the closing plenary	2/19/2015

## Breakfast Plenary

Maryanne Zimmerman proposed Pamela Jett as an inspirational speaker in lieu of Dr. Cofield. All were in favor of approaching Pamela for this opportunity. Adele will reach out to Pamela.

## Lunch Plenary

Cathy Sheffield, a PPP speaker resource, was proposed for the lunch plenary presentation speaking to building and sustaining relationships. It was noted Cathy could perhaps make it an interactive presentation to challenge participants to connect and build relationships with fellow attendees throughout the rest of the event and to carry over outside of the event going forward. It was also recommended to request Cathy present on planting seeds for a bountiful program in the first AM session in the PGE track. Chris will reach out to Cathy.

**Planned Giving Essentials Track:** “These sessions are provided to enrich your planned giving program to ensure a solid foundation for planned giving”

All were in favor of the following proposed topics/speakers. Assigned committee members for outreach are noted in (>):

- 9:15-10:30am: Cathy Sheffield – Planting seeds for a bountiful program (Chris)
- 11:00am-12:15pm: Greg Bodine – CGAs: Real life stories/conversations on when and what type work (Adele)
- 1:30pm-2:00pm: Greg Bodine – CGAs: How they are set up and how to have the conversation (Adele)

**Practical Applications for Planned Gifts-What’s Working Now?** “These sessions will address issues that go beyond the techniques of planning. As planning and charitable giving become more complex and strategic, consider who else should be “at the table” to serve your client/donor for a secure, successful, and fulfilling future.”

Peter is reaching out to potential speakers for this track. All were in favor of the following topics. Adele will share the committees recommended topics:

- 9:15-10:30am: Phil Cubeta? – Who else is at the Planning Table with your Client?
- 11:00am-12:15pm: Speaker?? (We want someone local) – Serving the client while walking the conflict of interest line
- 1:30pm-2:00pm: Phil Cubeta? – Who else is at the Planning Table with your Client?

**Board/CEO/Staff Track:** “CEO’s, ED’s and Board Chairs have a unique position in furthering a non-profit’s mission. These sessions speak specifically to the roles that each play in advancing the organization’s mission through their networks and by providing the structure for success”

All were in favor of the following proposed topics/speakers. Assigned committee members for outreach are noted in (>):

- 9:15-10:30am: Dennis McMellan – Protocol for boards to work with staff (Adele)
- 11:00am-12:15pm: Bruce Weber – Critical policy knowledge and the tools necessary to implement them (Stephanie)
- 1:30pm-2:00pm: Dennis McMellan – Protocol for staff to work with boards (Adele)

## Closing Plenary

All are in favor of a PGRTAZ board (current and past) reflection and takeaways presentation to include KJZZ/K-BACH associates. Adele will draft the structure of this presentation, reach out to board members, and advise how KJZZ/K-BACH will fit in the presentation.

All were in favor of inviting Taryl Hansen to capture the closing plenary/reflections of the day through visual art. Stephanie will reach out to Taryl.

**Next Meeting:** February 19<sup>th</sup> at 1pm via conference call

## Target Dates

Sponsor renewal	10/27/14	Done	Standard Registration	5/29/15	
-----------------	----------	------	-----------------------	---------	--

invites out			Ends		
Board basic OK: budget/goals	11/13/14	Done	Assemble Conf Book Name Tags/Flash Drives	6/2/15	
Budget/Goals: Committee OK	11/14/14	Done	Community Lounge Materials at PCC	6/2/15	
Begin work on look/feel graphic options	11/14/14	Done	Summer Forum	6/3/15	
Mass Sponsorship Appeal out	12/1/14	Done	Committee De Brief	6/19/15	
Save the Date Notice posted to website and ready to go to print	12/29/14	Done			
Best Possible Visibility and PR	12/15/14- 1/31/15				
Coordinated sponsorship follow up	1/5/15- 1/31/15				
Settle on program topics/list of headliners	1/16/15	Done			
All Speakers desired INVITED	1/23/15				
Headliners; breakout speakers Booked and confirmed	1/31/15				
Outreach invite to Collaborators for 2014	2/2/15				
Confirm Collaborators: start Press Releases	2/13/15				
Bundled Registration Opens	3/2/15				
Early Bird Opens	3/2/15				
Deadline for Ads and all other proceedings book content	5/8/15				
All proceedings book content to graphic designer for layout	5/11/15				
Early Bird Closes	5/15/15				
Standard Reg. Opens	5/16/15				
Proceeding Book to Printer	5/18/15				
Final Speaker Outlines Turned In	5/20/15				
Flash Drives ordered	5/22/15				

Connection	Fname	Lname	Title	Co	phone	email	Committee member Assigned	Initial Email Date:	Response Yes	Response No	Not Sure	Next Action
	Eileen	Rogers		Allegra Print and Imaging		<a href="mailto:Erogers@allegraaz.com">Erogers@allegraaz.com</a>	Stephanie					Discount?
2012 - 2014 \$1,500 Breakout	Allison	Gee		Allison Gee Fine Art Appraisals	623.535.0631	<a href="mailto:allisongee@msn.com">allisongee@msn.com</a>	Russ					Russ has emailed her
2011 - 2015 1/2 Scholarship Sponsor	Nicole	Hill		American Cancer Society	520.481.6454	<a href="mailto:nicole.hill@cancer.org">nicole.hill@cancer.org</a>	Tiffany	2.10.15	1/2 of Scholarship Sponsors			Nicole has reached out to Dayton to see if AHA will do
2011 - 2014 1/2 Scholarship Sponsor	Dayton	Gilbert		American Heart Association	602.414.5366	<a href="mailto:dayton.gilbert@heart.org">dayton.gilbert@heart.org</a>	Tiffany	2.10.15				Nicole from ACS has emailed her to match the
2014 \$1,500 Breakout Sponsor	Mark	Dillon		American Realty Capital (was	480.316.9861	<a href="mailto:mdillon@rcsecurities.com">mdillon@rcsecurities.com</a>	Tiffany			Not this year		also Michael Barnes
PGRTAZ Mbr	Rachel	Page		Ameriprise Financial	480.307.9653	<a href="mailto:rachel.e.page@ampf.com">rachel.e.page@ampf.com</a>	Diane	2.5.15				No response yet
	Judith	Pillon		ASU Foundation	480-965-5338	<a href="mailto:judith.pillon@asu.edu">judith.pillon@asu.edu</a>	Tiffany	Tiffany has emailed				Tiffany on Dept of Philanthropy Board with her
	Robert	Ashcraft, PhD		ASU Lodestar Center	602-496-0500	<a href="mailto:ashcraft@asu.edu">ashcraft@asu.edu</a>	Tiffany					also Nicole Almond / Nicole.Almond@asu.edu - Tiffany will do Lodestar after she hears back
2015 \$2,500 Final Plenary Sponsor	Adele	Dietrich		Arizona Community Foundation	602.682.2025	<a href="mailto:adietrich@azfoundation.org">adietrich@azfoundation.org</a>			\$2,500 Final Plenary			

2015 Complete Sponsor Solicitation List

Connection	Fname	Lname	Title	Co	phone	email	Committee member Assigned	Initial Email Date:	Response Yes	Response No	Not Sure	Next Action
2014 \$1,500 Breakout Sponsor	Janet	Elie		AXA Insurance	816.718.8668	<a href="mailto:Janet.elie@axa.us.com">Janet.elie@axa.us.com</a>	Stephanie / Diane	2.11.15				In October reached out to Stephanie. No response yet
PGRTAZ Mbr	Laura Ann	Bartlett, CEBS, AIFA	Vice President, Institutional Wealth	Bank of Arizona	602.808.5347	<a href="mailto:lbartlett@bokf.com">lbartlett@bokf.com</a>	Diane	2.5.15			X	Thank you for the invitation. I have forwarded the information to some of my business partners and we'll see what
	Cynthia / Karen	Schroeder, CPA / McCloskey, CPA	Shareholder / Share	Beach Fleischman		<a href="mailto:cschroeder@beachfleischman.com">cschroeder@beachfleischman.com</a> / <a href="mailto:kmccloskey@beachfleischman.com">kmccloskey@beachfleischman.com</a>	Diane	12.3.14 / 2.11.15				No response yet
2012 - 2014 \$1,500 Breakout Sponsor	Kristi	Bell	Vice President Opera	Bell & Associates	602.381.8600	<a href="mailto:kristi@wbassoc.com">kristi@wbassoc.com</a>	Diane	11.19.14 / 2.11.15				Diane spoke to her personally in November. No response
				Blackbaud		<a href="https://www.blackbaud.com/cor">https://www.blackbaud.com/cor</a>	Russ					
2015 \$2,500 Breakfast Sponsor	Lindsay	Jackson		BMO Harris Trust Bank	480.348.7722	<a href="mailto:lindsay.jackson@bmo.com">lindsay.jackson@bmo.com</a>	Adele		\$2,500 Breakfast Sponsor			Jennifer Herrema
	Terri	Hardy		Bonhams & Butterfields	480-994-5362	<a href="mailto:terri.hardy@bonhams.com">terri.hardy@bonhams.com</a>	Russ					



2015 Complete Sponsor Solicitation List

Connection	Fname	Lname	Title	Co	phone	email	Committee member Assigned	Initial Email Date:	Response Yes	Response No	Not Sure	Next Action
2013 \$1,500 Breakout	Kimberly	Feng		Catholic Community Foundation	602.354.2401	<a href="mailto:kfeng@ccfphx.org">kfeng@ccfphx.org</a>	Diane / Stephanie	10.31.14 / 2.11.15			X	Explained to Stephanie in October need to forward up to mgt. / no
2014 \$1,500 Breakout Sponsor	Mick	Koster		Comerica Legacy Foundation	734.930.2415	<a href="mailto:mekoster@comerica.com">mekoster@comerica.com</a>	Tiffany					Mick is on vacation until 2.17.15.
2013, 2014 \$3K Breakfast Sponsor	Tiffany	House	Vice President	Coyote Financial	480.905.3260	<a href="mailto:tiffany@mastertechfinancial.com">tiffany@mastertechfinancial.com</a>	Tiffany			X		not this year
	Greg	Allender		CBIZ and Mayer Hoffman	301.951.3636	<a href="mailto:gallender@cbiz.com">gallender@cbiz.com</a>	Russ					
	Mike	Cohn, CLU,	Managing	CFG Business	(602) 468-	<a href="mailto:mcohn@cfgllc.com">mcohn@cfgllc.com</a>	Diane	12.4.14 / 2.11.15				no response to date
	Becky	Cholewka		Cholewka Law	480-497-3770	<a href="mailto:becky@gilbertlawoffice.com">becky@gilbertlawoffice.com</a>	Diane	12.4.14 / 2.11.15				no response to date
2011 \$1,500 Breakout sponsor	Sharon	Park		Crescendo Interactive, Inc	800-858-9154	<a href="mailto:Sharon@cresmail.com">Sharon@cresmail.com</a>	Russ					Jennifer Cashin, Dir. Of Marketing 800.858.9154 <a href="mailto:giftlegacy@cre">giftlegacy@cre</a>
PGRTAZ Mbr	Susan	Shattuck		Desert Botanical	480.941.3507	<a href="mailto:sshattuck@dbg.org">sshattuck@dbg.org</a>	Russ					
	Tom	Dietrich		Dietrich Law	480-626-	<a href="mailto:tom@twdlaw.net">tom@twdlaw.net</a>	Tiffany			X		not this year
2013, 2014 \$1,500 Breakout Sponsor	Alan	Knobloch		Dignity Health	602.406.1025	<a href="mailto:alan.knobloch@dignityhealth.org">alan.knobloch@dignityhealth.org</a>	Russ			Alan Knobloch said not in budget due to capital		Russ moving discussion to San Francisco level / 2015 In-Kind Print Sponsor

2015 Complete Sponsor Solicitation List

Connection	Fname	Lname	Title	Co	phone	email	Committee member Assigned	Initial Email Date:	Response Yes	Response No	Not Sure	Next Action
2013 \$1,500 Breakout sponsor	January	Gomez		Eide Bailly	602.264.	<a href="mailto:jgomez@eidebailly.com">jgomez@eidebailly.com</a>	Diane	12.1.14		X		ask in October next year when budget
2015 \$1K Proceedings Sponsor	Kendis	Muscheid		Fennemore Craig, P.C.	602.916.	<a href="mailto:kmuschei@fclaw.com">kmuschei@fclaw.com</a>	Diane	11.25.14	\$1,000 Proceedings Sponsor			2012 - 2013 \$1K AV Sponsor, 2014 \$1,500
2011 \$1,500 Breakout Sponsor	Brandon	Collins	Charitable Planned	Fidelity Charitable	617-563-1658	<a href="mailto:brandon.collins@fmr.com">brandon.collins@fmr.com</a>	Diane	12.4.14 / 2.11.15				no response to date
	Linda	Allen	Regional Sales Manager	First Nonprofit Insurance Company /	312.715.3050	<a href="mailto:Linda.Allen@amtrustgroup.com">Linda.Allen@amtrustgroup.com</a>	Diane	12.4.14 / 2.11.15				Jennifer Blair left company sent new email to Linda
2015 \$1K AV Sponsor	Mike	King, JD	Attorney	Gammage & Burnham	602.256.4405	<a href="mailto:mking@gblaw.com">mking@gblaw.com</a>	Diane		\$1,000 AV Sponsor			\$1,500 Breakout Sponsor in 2012, \$750 Advertiser in 2013, \$2,500
	Mollie	Trivers		Generation Next	602-373-3377	<a href="mailto:mollietrivers@generationnextaz.com">mollietrivers@generationnextaz.com</a>	Russ					
2015 \$1,000 Community Lounge	Martha	Stoneberger		Goodwill of Central Arizona	602.535.4028	<a href="mailto:martha.stoneberger@goodwillaz.org">martha.stoneberger@goodwillaz.org</a>	Russ		\$1,000 In-Kind Sponsor			Russ is on their board
	Nicole	Gurley		Gurley LTC	480.515	<a href="mailto:Nicole@GurleyLTC.com">Nicole@GurleyLTC.com</a>	Stephanie					
	Chuck / Candace	Inderiden, CPA, PFS / Tooke,	Co-Managing	Henry & Horne, LLP	(480) 483-1170	<a href="mailto:chucki@hhcpa.com">chucki@hhcpa.com</a> / <a href="mailto:candacet@hhcpa.com">candacet@hhcpa.com</a>	Diane	12.4.14 / 2.11.15				no response yet
	Vicki	Harris		Hunter	480-946	<a href="mailto:vicki@hunterhag.com">vicki@hunterhag.com</a>	Russ					
	Nancy	Pohl		Jennings	6E+09	<a href="mailto:npohl@jsslaw.com">npohl@jsslaw.com</a>	Russ					

2015 Complete Sponsor Solicitation List

Connection	Fname	Lname	Title	Co	phone	email	Committee member Assigned	Initial Email Date:	Response Yes	Response No	Not Sure	Next Action
	Rich	Casper	Executive Direct	Jewish Community Foundation	(480) 699-1717		Tiffany	emailed				back in office 2.12.15 Tiffany to follow up
PGRTAZ Mbr	Scott	Showers		John C. Lincoln	623-434-6255	<a href="mailto:Scott.showers@jcl.com">Scott.showers@jcl.com</a>	Diane	12.3.14		X		
2015 \$3K Media In-Kind	Linda	Pastori	Manager	KJZZ / K-BACH	480.774.8452	<a href="mailto:lpastori@rioradio.org">lpastori@rioradio.org</a>	Diane	11.19.14	\$3K Media			
	Don	Wenk		Kotzin	602-544-	<a href="mailto:dwenk@kotzinv.com">dwenk@kotzinv.com</a>	Russ					
PGRTAZ Mbr	Dan	Packard		Law Office of Dan	602.906.0311	<a href="mailto:danpackard@cox.net">danpackard@cox.net</a>	Diane	2.12.15				no response yet
	Denise	McLain		Lowry Hill/Abbot	480-905-9248	<a href="mailto:dmclain@lowryhill.com">dmclain@lowryhill.com</a>	Diane	2.12.15				no response yet
2011 \$1,500 Breakout Sponsor				M&I Wealth Management			Diane					WHO SHOULD WE CONTACT?
	MaryGlen n	Boals		MaryGlenn Boals LTC	602-418-5069	<a href="mailto:mgboals@mgboals.com">mgboals@mgboals.com</a>	Diane	12.3.14		No longer participate		Requested to be removed
PGRTAZ Mbr	Mike	Colbert, CLU, ChFC, CASL, CAP	Financial Planner	MassMutual Financial	602.393.8360	<a href="mailto:mcolbert@financialguide.com">mcolbert@financialguide.com</a>	Diane	2.12.15				per Mike: I know our company is tremendously supportive to many of the member charities and I
PGRTAZ Mbr	Troy	McNemar		McNemar Law Office	602.265.3971	<a href="mailto:law@mcnemar.com">law@mcnemar.com</a>	Russ					
PGRTAZ Mbr	Sasha	Lewis		MIM	480.245	<a href="mailto:sasha.lewis@mim.com">sasha.lewis@mim.com</a>	Russ					
PGRTAZ Mbr	Ron	Wilson		Morris Hall Kinghorn	602.249.1328	<a href="mailto:rwilson@morristrust.com">rwilson@morristrust.com</a>	Diane	12.3.14 / 2.12.15				second personal ask
	Pamela	Keefe		National Bank of	480-384-5048	<a href="mailto:Pamela.Keefe@NBArizona.com">Pamela.Keefe@NBArizona.com</a>	Russ					Jason Segal

2015 Complete Sponsor Solicitation List

Connection	Fname	Lname	Title	Co	phone	email	Committee member Assigned	Initial Email Date:	Response Yes	Response No	Not Sure	Next Action
	Marc	Kellenberger		Phoenix Philanthropy Group	602.291.0370	<a href="mailto:kellenberger@phoenixphilanthropy.com">kellenberger@phoenixphilanthropy.com</a>	Russ					also William Bessette 602.421.2287 / bessette@pho
2014 \$1K AV Sponsor NOT PAID				Protective Life			Diane via Steve Brock	11.19.14		X		per Steve Brock - not sponsoring this
PGRTAZ Mbr	Patty	Park		Northern Trust, NA	602.468.2591	<a href="mailto:pap13@ntrs.com">pap13@ntrs.com</a>	Tiffany	12.4.14				DJP emailed 12.3.14, no response / Tiffany to try / active and
2015 Breakout Sponsor	Russell	Goldstein	President	PGRTAZ			Russ					
	Ben	Powers		Powers Young & Company	(602) 249-0178	<a href="mailto:info@powersyoung.com">info@powersyoung.com</a>	Adele					Pres of AFP - AFP was a 2012 \$1,500
	Christopher	Siegle		Private Wealth Management at J.P. Morgan	480-367-3279	<a href="mailto:christopher.p.siegle@jpmorgan.com">christopher.p.siegle@jpmorgan.com</a>	Russ					Also L. Jeannette Wright / 480.333.4462 /
	Matt	Dana, JD	Partner	Quarles & Brady	602.229.5200	<a href="mailto:matthew.dana@quarles.com">matthew.dana@quarles.com</a>	Tiffany	11.12.14				Dana Law Breakout Sponsor 2012, 2013, 2014 / Matt might also support
	Marc	Carmichael, JD	President	R&R Newkirk	800-342-2375	<a href="mailto:marccarmichael@msn.com">marccarmichael@msn.com</a>	Diane	12.4.14 / 2.12.15				no response yet

2015 Complete Sponsor Solicitation List

Connection	Fname	Lname	Title	Co	phone	email	Committee member Assigned	Initial Email Date:	Response Yes	Response No	Not Sure	Next Action
	Sandra	Abalos, CPA	Principal	REDW	602.730.3606	<a href="mailto:SAbalos@redw.com">SAbalos@redw.com</a>	Diane	12.4.14 / 2.12.15				no response yet
	Donna	Esposito	Director	McGladrey	602.636.6000	<a href="mailto:donnaespositold@gmail.com">donnaespositold@gmail.com</a>	Diane	12.4.14 / 2.12.15				no response yet
	Margae	Diamond		Schwab	415-007-0125	<a href="mailto:margae.diamond">margae.diamond</a>	Russ					
2011 \$1,500 Breakout Sponsor	John	Vryhof		Snell & Wilmer	602-382-6333	<a href="mailto:jvryhof@swlaw.com">jvryhof@swlaw.com</a>	Russ					
	Terri	Wogan		Social Venture	602-224-0041 x	<a href="mailto:twogan@svpaz.org">twogan@svpaz.org</a>	Russ					
PGRTAZ Mbr	Ron / Penny	Guziak / Cowden	CEO / CDO	Sun Health Foundation	623.832.5582	<a href="mailto:ron.guziak@sunhealth.org/">ron.guziak@sunhealth.org/</a>	Diane	2.12.15				Diane sent personal ask to
2014 \$1K Proceedings Sponsor	Jeffrey	Wright		Symetra Life Insurance Company	281.520.9276	<a href="mailto:Jeffrey.Wright@symetra.com">Jeffrey.Wright@symetra.com</a>	Diane via Steve Brock					Discussed with Steve Brock on 11.19.14
PGRTAZ Mbr	Ron	Huddleston		The Huddleston	877.831.0472	<a href="mailto:ron@thehuddlestongroup.com">ron@thehuddlestongroup.com</a>	Russ					
PGRTAZ Mbr	Marc	Kellenberger		The Phoenix Philanthropy	602.291.0370	<a href="mailto:moreno@phoenixphilanthropy.c">moreno@phoen ixphilanthropy.c</a>	Russ					
2015 Sponsor	Russell	Goldstein		U.S. Trust, Bank of America Private	602.523.2924	<a href="mailto:russell.goldstein@ustrust.com">russell.goldstein@ustrust.com</a>			X			2011 - 2015 \$3K Lunch Sponsor
PGRTAZ Mbr	Elizabeth	Shabaker	Owner	Versant Capital	602.635.3760	<a href="mailto:lizs@versantcm.com">lizs@versantcm.com</a>	Tiffany	2.10.15				Tiffany spoke with Lisa
2013 \$1,500 Breakout Sponsor	Denise	McClintic		Wells Fargo Private Bank	480.370.6296	<a href="mailto:denise.a.mcclintic@wellsfargo.com">denise.a.mcclintic@wellsfargo.com</a>	Diane	2.12.15				Denise is a PGRTAZ Mbr.