

# RISING TO THE OCCASION



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Preparing for our Second Century of Impact

## ***Rising to the Occasion Campaign: Preparing for Our Second Century of Impact***

For nearly 100 years, Valley of the Sun United Way has been a trusted partner and influential leader in funding critical community-based programs and services and supporting our most vulnerable and disadvantaged neighbors. We embrace our unique role in convening and partnering with individual and institutional philanthropists; volunteer leaders and nonprofit organizations; and with businesses and local governments to achieve transformational change and impact. As one of the strongest and most comprehensive nonprofit organizations in Maricopa County and the state of Arizona, Valley of the Sun United Way is ***rising to the occasion*** and leading the charge for a healthy, just, secure, and rewarding future for all.

We invite you to be a part of our force for change by investing in Valley of the Sun United Way's endowment through our ***Rising to the Occasion Campaign***. Our goal is to double our current endowment by raising an additional \$50 million in endowed funds to reach \$100 million by 2026, as we begin our second century of service. This will have a profound impact on our ability to direct critical funding to our community's most pressing and challenging social issues, while providing the financial security of reliable funding to support community partners for future generations to come. In addition, a portion of the endowment will be reserved for the Valley of the Sun United Way Innovation Fund to invest in and advance transformative, community-led, evidence-based programs that offer dynamic ideas and solutions to our most important social issues.

### ***Why United Way?***

Envisioning a community where every child, family, and individual is healthy, has a safe place to live, and has every opportunity to succeed in school, in work, and in life, Valley of the Sun United Way is among the leading funders of nonprofit health and human services programs in Arizona. For nearly a century, Valley of the Sun United Way has brought partners together from every sector—public, private, and nonprofit—to do what no single organization can do alone: ***create solutions that transform individual lives and drive systemic change that impacts the entire community.***

Time after time, and especially during times of crisis such as the COVID-19 pandemic, Valley of the Sun United Way's endowment has been a lifeline for the health and well-being of people and communities in Maricopa County. With visionary and driven executive leadership and a long history of strong, committed volunteer leadership in our Board of Directors, Valley of the Sun United Way is more prepared than ever to ***rise to the occasion*** and meet the challenges of the future.

An investment in Valley of the Sun United Way's Endowment Fund is an investment in securing a stronger, more equitable community for children, families, and individuals throughout Maricopa County for the next century and beyond.



## ***A Century of Influence, Leadership, and Results***

For nearly 100 years, Valley of the Sun United Way has been a leading community resource to address and positively influence the social and economic development of Maricopa County and the state of Arizona. Some examples, over the decades, include the following.

In the 1920s, in the depths of a national crisis, the Welfare League and the Community Chest joined forces to spark a nearly 100-year legacy that is now Valley of the Sun United Way. During the Great Depression, we created an unemployment relief program. While our bravest fought in Europe during World War II, we declared war on childhood hunger. By 1959, the United Fund partnered with 36 nonprofits and piloted our first \$1 million campaign. When the swine flu hit in the mid-1970s, we stepped up with a vaccination program. In the early-1980s, we officially became Valley of the Sun United Way. Come the new millennium, we established the endowment with a million dollar gift from Webb-Claridge, embracing the digital age by bringing the community together electronically with “E-Way,” our first digital-giving platform, and establishing critical funding when a shocked nation fell into a financial crisis in 2001.

In 2020, Valley of the Sun United Way led the community’s response to the COVID-19 crisis by launching the United for the Valley COVID-19 Response Fund in partnership with the Arizona Community Foundation. The collaborative effort raised nearly \$3 million and immediately deployed those funds to support more than 500,000 of our neighbors, 66 nonprofit partners, and funded 75 programs, including the City of Phoenix Airport Worker Child Care Scholarships, support of schools and parents with essential tools and resources, and a system to provide frozen, prepared meals to seniors.

These critical issues, and Valley of the Sun United Way’s immediate and relevant responses, illuminated and intensified the need for Valley of the Sun United Way to *rise to the occasion* and build a healthy endowment that protects our community’s future for decades to come.



1970s Marching band steps into shape of United Way logo

“Our family’s endowed gift is more than just a one-time donation. For us, we see it as a strategic investment to create a more sustainable and thriving community for future generations of children, families and individuals throughout Maricopa County.”

**Jenny Holsman Tetreault  
and Colin Tetreault**





2000s Boys and Girls Club of Metro Phoenix

## Valley of the Sun United Way's Mighty Change 2026 *Our Next Phase of Service and Impact*

In 2021, Valley of the Sun United Way led a community-driven planning process, gathering input from business and community leaders, donors, policymakers, people with lived experience, nonprofit and education leaders, neighborhood residents, foundations, and others to inform the important work that would become and ultimately advance Mighty Change by 2026. Through this process, the community identified the following as the most critical issues affecting people in Maricopa County, setting the impact agenda for the five-year MC2026 strategic plan:

- **Health** – Remove barriers to ensure everyone in our community is healthy with a focus on access to food and health care
- **Housing and Homelessness** – Ensure all can have a safe home to call their own
- **Education** – Close opportunity gaps to ensure children read at grade level by 3rd grade and youth are prepared for educational success and employment
- **Workforce Development** – Open pathways to better paying jobs

These four issues remain at the forefront of our work each and every day.

Every five years, the Valley of the Sun United Way's Board of Directors and executive leadership, with input from the community, creates a new strategic plan—a new phase of service and impact to address the leading social issues of the time.

The *Rising to the Occasion Campaign* will provide vital, sustainable and flexible financial resources to help realize the goals of MC2026 and future strategic plans.

With a goal to reach \$100 million in endowment funds, this campaign will ensure support for new, bold initiatives well into the future that address current needs, fund innovation, and accelerate lasting community change for Valley of the Sun United Way's next 100 years.

“Establishing a strong foundation for the future success and prosperity of our community has never been more important. As the Valley continues to grow, the decisions we make today are going to impact the kind of community we are in the future. It’s our time to come together, as friends, neighbors and colleagues, to make a lasting difference for years to come.”

**Kathleen  
and John Graham**



*Members of the Phoenix Boys Club join United Way volunteers on a crane that took them to the top of a 1960s goal tower*

### ***Join Us as We Rise to the Occasion!***

The generosity and commitment of current and past donors and volunteer leaders have built a strong foundation for Valley of the Sun United Way. Our ***Rising to the Occasion Campaign*** will allow Valley of the Sun United Way to make an even greater difference in the lives of millions of people.

Many donors choose to fund the endowment by remembering Valley of the Sun United Way in their estate plans through a bequest, charitable trust, or life insurance gift. An outright endowment gift of cash or appreciated securities will allow you to receive immediate tax benefits in the year you make the gift—and be able to see the results of your generosity in action for years to come. Designations from a donor advised fund and qualified charitable distributions from an IRA are simple ways to optimize your giving and impact.

Endowment investments may be unrestricted to meet our community’s greatest needs and opportunities, dedicated to the Innovation Fund, or designated to reflect a donor’s personal interests or passions. Funds contributed to the endowment are invested for long-term growth, professionally managed, and overseen by Valley of the Sun United Way’s Board of Directors Investment Subcommittee. Annually, the Investment Subcommittee recommends allocations to be used to fund important initiatives and accelerate community change.

For nearly 100 years, individuals, businesses, and organizations have supported the work of Valley of the Sun United Way, providing a testament to its trusted leadership and endorsement of its mission to improve lives by mobilizing the caring power of our community.

***Please join us in honoring the second century of Valley of the Sun United Way. We invite you to Rise to the Occasion with us by investing in and inspiring transformational change for generations to come.***

# Ready to rise to the occasion? **INVESTING IN THE FUTURE**

If we've learned anything in recent years, it's that you never know what the future will hold. Preparing us to weather any storm, the Valley of the Sun United Way Endowment Fund provides a permanent source of revenue that deepens our work and safeguards our future. One of the most powerful ways to support us, your gift to the Endowment Fund fuels our ability to address urgent and emerging needs in Maricopa County.

*Carla Vargas Jasa*  
*President & CEO*  
*602.631.4810*  
*[cjasa@vsuw.org](mailto:cjasa@vsuw.org)*

*Lisa Groves, JD*  
*Major & Planned Gifts Director*  
*602.377.5801*  
*[lgroves@vsuw.org](mailto:lgroves@vsuw.org)*

**Valley of the Sun  
United Way**



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