

FY24 Annual Report



Legacy Foundation of Southeast Arizona

Promoting Population Health and Community Wellness
Throughout Southeast Arizona



Dear Friends,

As we come to the end of another year, we are seeing light at the end of the “COVID-19 tunnel”. Although we may never completely return to life before COVID-19, each day we see fewer restrictions and more comfortable interactions. Here at the Legacy Foundation we have held more in person events; we have resumed our Olson Outreach Center education and networking sessions and we are back on track with site visits to our not-for-profit partners.

I am very proud of the Legacy Foundation staff and Board and how they have responded to the pandemic and focused resources on those most in need, including those individuals with needs for Behavioral Health Services.

For some time, a major focus for the Legacy Foundation, deepened by the impact of COVID-19, has been how to tackle the mental health and substance abuse challenges in our communities. To that end, this year the Legacy Foundation Board awarded Strategic Grants to organizations with strategies to improve Behavioral Health Services.

Grants and other donations are the anchor of the Legacy Foundation, and since inception we have gifted and awarded more than \$20 million to the communities we serve. Please read about the Behavioral Services Grants and the other grants and sponsorships the Legacy Foundation has recently awarded.

Through ongoing expansion of our Mission and purpose, the Legacy Foundation is dedicated to assisting organizations sustain their impact in their communities. Recently we implemented the Community Dashboard to assist organizations in identifying opportunities to improve community health. The dashboard can be accessed from our website. GrantWatch, a subscription software program, is also now available to assist organizations seeking grant opportunities. Our Resource Guide, featured in this report, is continuously updated and well utilized in the community.

Looking to the future, I am excited to announce that plans are underway to develop our Legacy Foundation Plaza. Over the next two years we will be constructing an Event Center and a Retreat Facility for our partners to use for educational gatherings and as a venue for fundraisers and other events.

We will keep you up to date on our construction projects.....

I want to take this opportunity to thank all of our nonprofit partners for their contributions to our communities. Despite the challenges of the last two years your perseverance and commitment have been commendable. Thank you all for your resilience and dedication.

To all, I hope you enjoy reading about our Legacy Foundation, our partners and our plans. It is with a great sense of optimism that I look forward to 2023 and the work before us.

The Legacy Foundation Board and staff join me in wishing everyone in the communities we serve and beyond..... a New Year filled with Good Health, Peace and Joy!

Who We Are

Population Health and Community wellness, in other words, a healthy community, is a community where people have the opportunity to make healthy choices in environments that are safe, equitable, free from violence, and designed to promote health.

The Legacy Foundation promotes healthy communities through a focus on four priorities:

Philanthropy

Philanthropy involves giving initiatives for the public good and focus on quality of life. In fulfilling its work as a private foundation, the Legacy Foundation's giving initiatives include donations through our Grant Cycles.

Strategic Grants: grants for specific initiatives the Legacy Foundation Board identifies. Strategic Assessment studies as well as information from existing public health data may be used to identify opportunities.

Innovative Grants: grants to support innovative ideas that support the mission of Promoting Population Health and Community Wellness.

Responsive Grants: grants in response to special requests or needs from the communities served.

Emergent Grants: grants for assistance with urgent or immediate community needs.

Fast Pitch Grants: education and technology grants to strengthen an organization's ability to operate efficiently.

Diversity, Equity, and Inclusion Grants: grants for the purpose of obtaining Diversity, Equity, and Inclusion (DEI) training for their staff, Board, and volunteers.

Capacity Building

Community capacity building is the process of developing and strengthening the skills, instincts, abilities, processes and resources that organizations and communities need to survive, adapt, and thrive in the fast-changing world.

In fulfilling its Mission, the Legacy Foundation plays a significant role in supporting capacity-building efforts.

The Legacy Foundation offers grants designated to build organizational capacity through education and resource development. Additionally, the Legacy Foundation promotes capacity building by offering free monthly workshops for nonprofit organizations. Topics such as fundraising, board development, strategic planning, and media and marketing are examples of classes offered.

Collaboration

Community collaboration and organization development are fostered when passions are shared and organizations work together to improve communities.

The Legacy Foundation supports community collaboration by partnering with and convening organizations to promote partnerships and synergies.

The Legacy Foundation also requires collaboration between organizations applying for grants.

Innovation

Innovation is the use of new and better ideas and solutions to meet needs.

The Legacy Foundation fosters and contributes to change and new ideas by providing community leadership and supporting others to be innovative in fulfilling their organizational missions.

Our Mission

Promoting Population Health and Community Wellness Throughout Southeast Arizona

Our Vision

Southeast Arizona . . . the Health and Wellness Model for the Nation

Our Shared Values

- Collaboration: We will partner with others to achieve our mission.
- Innovation: We will foster and contribute to change and new ideas.
- Integrity: We will be open and honest in our interactions.
- Respect: We will treat everyone fairly and honor the dignity and worth of all individuals.
- Stewardship: We will ensure responsible use of all assets entrusted to us.
- Knowledge: We will foster opportunities to gather and share knowledge.



Event Center and Retreat Center Construction Begins

On April 22, 2024, shovels were placed at-the-ready to break ground for the building of a new Event Center. Legacy Foundation Board of Directors and Sierra Vista Mayor Clea McCaa were invited to be the first to turn ground to celebrate the event.



Margaret Hepburn, CEO, and Legacy Foundation Board Directors break ground for the new event center.

The Event Center will feature a state-of-the-art conference space with seating for up to 150 people, the latest in technology including big screens and sound booth, a commercial kitchen, a welcoming lobby, covered outdoor seating and landscaped grounds.

The facility is designed to be used by nonprofit organizations as a venue for fundraising events, conference space, and meeting space.

A Retreat Center is also being developed on the campus. The Retreat Center will feature a relaxed vibe with comfortable seating promoting a more cozy, welcoming and comfortable meeting space. The Retreat Center can be used for less formal get-togethers but also for board retreats and other types of meetings. The Center features a state-of-the-art board room in addition to a meeting space that offers relaxation and comfort.



Event Center Concept Drawing

Cochise County Drug Summit

The Legacy Foundation sponsored the first Cochise County Drug Summit on April 10th, 2024. The Summit was a gathering of Cochise County providers of services addressing substance use disorder, including prevention, treatment, peer support, outreach, and recovery.

There were several intended outcomes of the Summit.

- Networking organizations and increasing collaborative relationships
- Understanding the issues related to substance abuse as it pertains to Cochise County
- Addressing stigma through the story-telling of lived experiences
- Identifying gaps and opportunities in Cochise County communities
- Creating plans to take action to address gaps and opportunities

Keynote speaker was Sam Quinones, well-traveled journalist and researcher in the opioid epidemic and the substance abuse crisis in America. Several special guest speakers followed, all presenting Cochise County specific information, data, and reports. Several presentations by persons with lived-experience in addiction and recovery and a presentation by a family member of someone struggling with substance use disorder offered the attendees a deeper look into the struggles and challenges individuals and families face.

At the end of the day, table groups were formed and action items created. Each community in Cochise County was represented by at least one team with action items developed specific to that community. Discussion of progress on the action items occurs at the Cochise Addiction Recovery Partnership.



Achievements of the Summit include:

- Expanding membership and participation in the Cochise Addiction Recovery Partnership (CARP)
- Increased education about Fentanyl Facts in Arizona
- Increased collaboration between organizations
- Expanded medication assisted therapy (MAT) treatments in Benson
- Increased education and availability of Narcan
- Development of a video series, Stories of Hope, highlighting journeys of recovery from substance abuse

On November 18th, 2024, a follow-up to the Summit took place focused on providing information and education to the public.

FY24 Financials

Revenues:

Residual Business, Net: \$41,185,471

Investment Activity, Net: \$0

Other: \$6,645,847

Total Revenue: \$7,831,318

Expenses:

Grants: \$747,242

Sponsorships: \$46,142

Community Education: \$15,319

Other Expenses: \$1,704,698

(3.8% of Total Assets)

Total Expenses: \$2,513,401

\$793,384

Awarded in Grants and Sponsorships

Each grant cycle has its own budget and awards up to a maximum annual dollar amount. The Responsive Grant awards up to \$5,000. The Fast Pitch Grant awards up to \$2,500. The Innovative Grant awards up to \$50,000. The Strategic Grant awards vary from year to year. Discretionary Grants vary depending on the project. Sponsorships award up to \$1,000. The total amount awarded in FY24 for all grants and sponsorships is \$793,384

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Grants Awarded

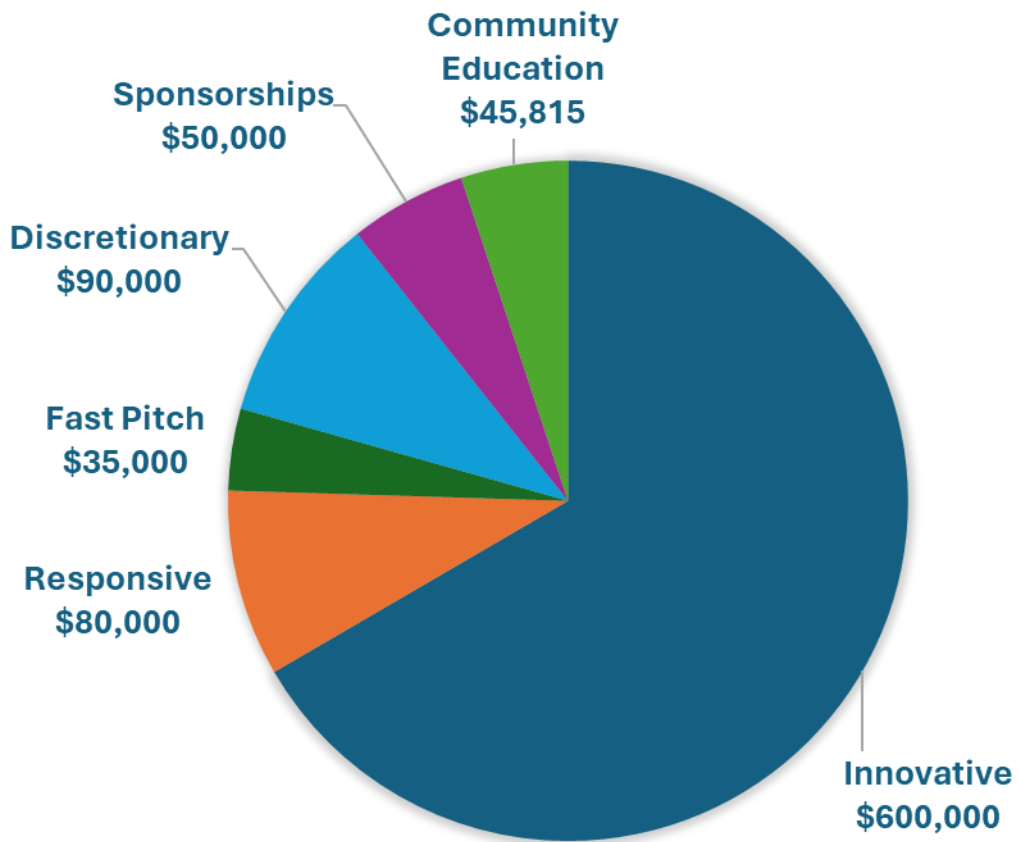
The Legacy Foundation, with its multiple grant cycles offered throughout the year, had 95 applications submitted in FY24. With funding requests often far exceeding the budgeted amount for each grant, the grant review committee makes very difficult decisions about what projects to fund and for how much. Sixty applicants received funding.

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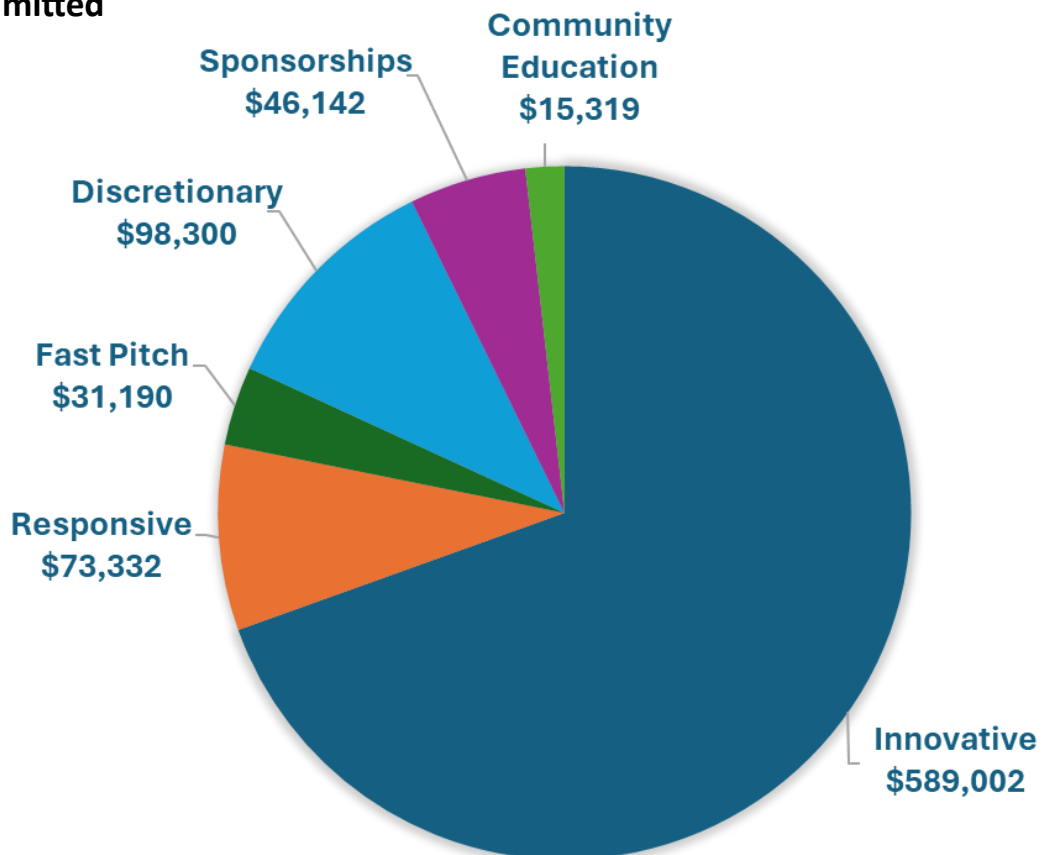
Sponsorships
Awarded

In addition to several grant cycles, the Legacy Foundation offers Sponsorships. Sponsorships are available throughout the year to support nonprofits in fundraising and community events. In FY24, forty-six sponsorships were awarded.

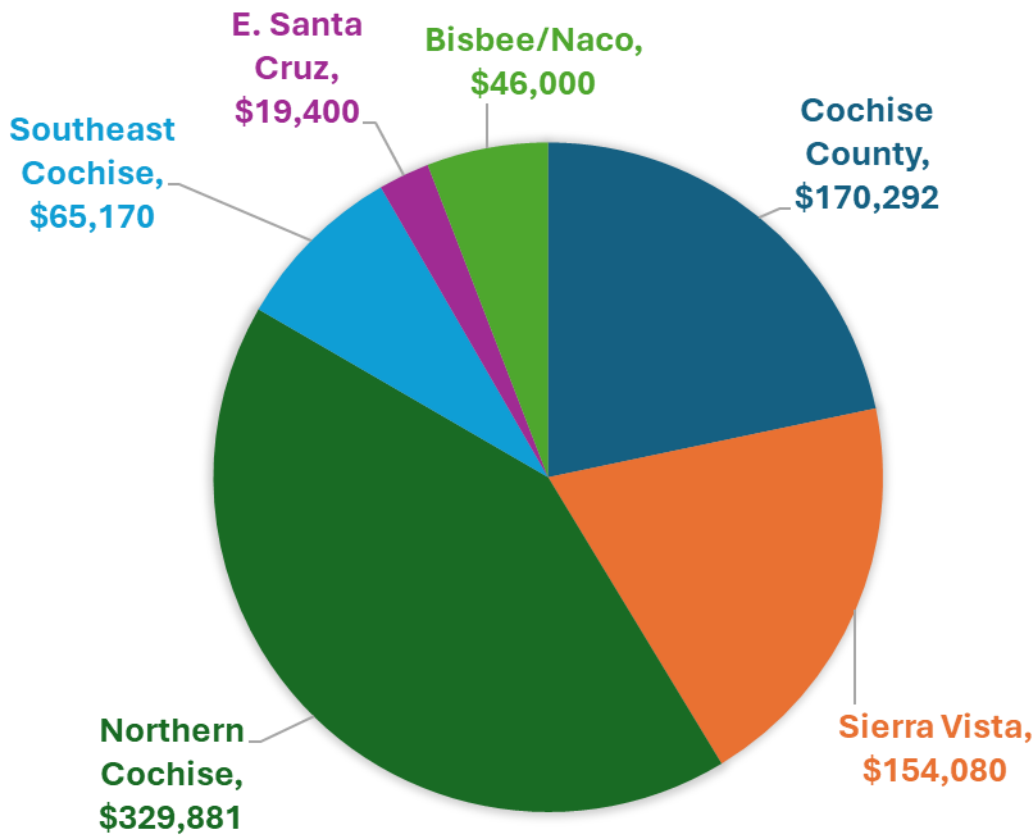
Budgeted



Paid and Committed



Grant distribution by location



Fast Pitch Grants

[Bisbee Science Exploration & Research Center \(BSERC\)](#): \$2,500 - Funds used to strategically adopt QuickBooks accounting software. This technological advancement strengthens BSERC's financial foundation and sustainability

[Break the Cycle jam3s Inc. / Jennifer House](#): \$2,500 - Funds used to open a thrift shop inside its coffee shop and provide a point of sale system

[City of Bisbee](#) : \$2,500 - The Mantis X3 Training System along with Bluetooth technology will provide every officer within the agency the ability to complete Arizona Officers and Standards and Training (AZPOST) continuous training requirements

[City of Tombstone](#): \$2,500 - Tombstone Marshal's Office has online required training which is required by Arizona Peace Officer and Standards Training (AZPOST). This program will provide the deputy and employees an off-the-sensitive law enforcement computers for training

[Cochise Chess](#): \$2,500 - Cochise Chess used funds for its leaders to attend the St. Louis Chess Conference, enhancing teaching strategies and community engagement to elevate our bilingual chess program's impact in rural Cochise County

[Cochise Family Advocacy Center \(Lori's Place\)](#): \$2,500 - Funds used to pay for new security cameras and a new network switch for internet services

[Cochise Harm Reduction](#): \$2,500 - This grant was used to send CHR staff to Arizona Department of Health Services' Annual Symposium on HIV, HCV, and STIs in Phoenix in April

[Love Muziq Operation 13:2](#): \$2,332.93 - Funds used to purchase upgraded equipment for its youth recording studio. This equipment will be used by studio interns/staff to learn current systems & techniques in the audio engineering field & to better instruct our students

[National Alliance on Mental Illness Southeastern Arizona \(NAMI\)](#) : \$2,500 - Implementation of QuickBooks Advanced with Payroll plus HR will improve organizational efficiency and provide for easier financial tracking and reporting

[Patagonia Regional Times](#): \$2,500 - Funds used for the purchase of a camera and for photojournalism workshops to support the work of our 24 volunteer citizen journalists at the Patagonia Regional Times

[SouthEastern Arizona Governments Organization \(SEAGO\)](#): \$2,467 - Funds used to send three people to the 2024 Arizona Rural Policy Forum (RPF) to enrich SEAGO staff with new connections, programs, funding sources, education, and inspiration

[Volunteer Interfaith Caregiver Program \(ViCaP\)](#): \$2,500 - ViCaP used the funds towards professional development and additional training opportunities for our paid-staff members in order to learn and grow to best serve our Neighbors

[Willcox Theater and Arts \(WTA\)](#): \$1,390 - WTA senior staff learned new strategies, techniques, and technologies through attendance at 2 conferences and purchased a cloud subscription to Jotform to enhance its participant data collection and surveying

Funded Projects



New Drinking Fountain at Leffingwell Park

Town of Huachuca City

Water is a precious commodity, especially in the Arizona heat. With a \$3,000 Responsive Grant, the Town of Huachuca City added a new drinking fountain and water-bottle filler at one of its community parks.

Stephanie Fulton, Director of Library and Community Services commented,

" We are so happy to have this new fountain, which is helping both our residents and saving the planet! Park users can now use the facility for longer as they can refill their bottles for free."



Sierra Vista Community Garden Accessibility Path

The Sierra Vista Community Garden

The Sierra Vista Community Garden had one goal: to make the community garden wheelchair accessible. With a \$17,000 Innovative Grant, a paved path was installed from the garden entry gate to five wheelchair-accessible tower beds.



Anthony Witt, Outreach Worker for Cochise Harm Reduction

Cochise Harm Reduction

Cochise Harm Reduction completed the first year of a two-year \$100,000 Innovative Grant for Cochise County Street Outreach. The project has increased access to Naloxone, decreased rates of infectious disease through distribution of sterile syringes, and increased access to care.

Responsive Grants

[Arizona Rangers](#): \$4,817 - State Approved Summer Uniforms

[Bisbee Coalition for the Homeless](#): \$5,000 - Food Transportation / Fuel to transport food

[Boys and Girls Club of Bisbee](#): \$5,000 - Brain Gain - summer and after-school program: spelling, reading and math education

[City of Douglas](#): \$2,500 - Healthy Choices At Your Library: A Health Literacy Program - nutritional education and cooking class for children and families

[City of Tombstone](#): \$3,000 - Enlightening our Seniors Through Technology - Purchase of laptop for senior citizen technology education at the Tombstone Senior Center

[City of Willcox](#): \$3,000 - Picturing Willcox - senior citizen photography-based workshop

[Douglas ARC](#): \$5,000 - Douglas ARC's Home Deliver Meals to Douglas, Bisbee, and Elfrida - Food Containers for home delivery

[Dragonfly Community Alliance](#): \$3,000 - H'epi's Harvest Food Pantry - Purchase of food for pantry

[Family Health Care Amigos](#): \$2,400 - Transportation and Incontinence Fund - Cochise County - incontinence supplies for the Huachuca City Hub.

[San Simon Fire Auxiliary](#): \$3,890.43 - San Simon fire safety prevention & education supplies

[Senior Citizens of Patagonia, Inc](#): \$4,500 - Patagonia Senior Center - Stainless Steel Kitchen Upgrade with Wall Cabinets

[Sierra Vista Symphony](#): \$5,000 - 2024 Children's Concert and Concerto Competition

[Sonoita-Elgin Fire District](#): \$5,000 - Strategic Planning consultant 2023-2026

[Special Olympics Arizona, Inc](#): \$3,000 - Inclusive Sports Programming in Cochise County

[The Salvation Army](#): \$2,250 - Kids Culinary and Food Pantry Projects

[Town of Huachuca City](#): \$3,000 - Helping Huachuca City Stay Hydrated

[Town of Huachuca City](#): \$2,973.63 - School Resources Officer start up program

[Willcox Community Food Pantry](#): \$5,000 - Emergency/Monthly Food Box Program

[Willcox Theater and Arts](#): \$5,000 - Willcox Delivers Art - school art program

Funded Projects



Refrigeration Unit for Willcox Community Food Pantry

Willcox Community Food Pantry

Willcox Community Food Pantry serves up to 300 families a week. To accommodate large food donations and to better serve its community, the Pantry purchased and installed a 10 foot by 12 foot walk-in refrigerator with funds from a \$25,500 Innovative Grant.



City of Douglas Library STEAM Programs

City of Douglas

With a \$2,500 Responsive Grant, the City of Douglas Library offers a synergistic, STEAM-based program that provides nutrition education, including fun cooking and healthy snacks. The Healthy Choices at Your Library project empowers youth to make informed lifelong healthy choices.



Cochise Chess Players

Cochise Chess

Cochise Chess received a Fast Pitch grant for \$2,500 to send its leadership team to the St. Louis Chess Conference. Its goal is to enhance teaching strategies and community engagement to elevate bilingual chess programs in rural areas of Cochise County.

Innovative Grants

The Boys and Girls Club of Sierra Vista: \$100,000 - The Club was awarded funding to place a satellite club in the Palominas School District

Champions for Youth Foundation: \$50,000 - Funds will be used to install unisex restrooms at Quail Park in Willcox

City of Douglas: \$50,000 - The City of Douglas will purchase and install a fitness court at Veterans Memorial Park

Cochise County Master Gardeners Association: \$10,206 - The garden will install plant identification signs with QR codes, new benches, a gazebo, and replace roses

Dragonfly Community Alliance: \$100,000 - A new community center and food pantry will be developed at a newly purchased building in Bowie

Good Neighbors Alliance: \$43,000 - Homeless people and their pets will now both be welcome at Good Neighbor Alliance with funding to build a small pet kennel onsite

Roots & Roads Community Hospice Foundation: \$37,125 - This project supports survivors of suicide through train-the-trainer support groups

Sierra Vista Community Gardens: \$17,000 - Making the gardens accessible by making it wheelchair and walker friendly is the intent of this project

Sunsites-Pearce Fire District: \$31,671 - An auto chest-compression device will be purchased with grant funds making response to cardiac arrest more effective

The Salvation Army: \$50,000 - The Salvation Army will employ a case worker to refer clients to local resources and to help people get a hand-up, not just a hand-out. A mobile meals staff member will help with production of mobile meals



Good Neighbors Alliance Pet Pal Palace

Funded Projects



Love Muziq Operation 13:2 Recording Studio

Love Muziq Operation 13:2

A Fast Pitch grant in the amount of \$2,332 enabled Love Muziq Operation 13:2 to upgrade equipment for its youth recording studio. Used to instruct students in the audio engineering field, the equipment is used by interns and staff to learn current audio systems and techniques.



Patagonia Senior Center Kitchen Upgrade

Senior Citizens of Patagonia, Inc.

When told that its commercial kitchen needed to be upgraded to stainless steel, Senior Citizens of Patagonia applied for and received a \$4,500 Responsive grant to do the upgrade. The upgrade improves hygiene, sanitation, meal preparation efficiency and appearance for its 166 registered senior meal clients.



The New Aquaponics System at Echoing Hope Ranch

Sierra Vista Rotary Club Charities (Sunrise Rotary Club)

Sierra Vista Rotary Club Charities (Sunrise Rotary Club) was awarded a discretionary grant in the amount of \$4,000 in order to match available funds through Rotary. The funds helped to build an Aquaponic Vertical Garden system at Echoing Hope Ranch. Aquaponics provide therapeutic benefits and valuable learning to the residents and clients of Echoing Hope Ranch. Echoing Hope Ranch serves individuals with autism and other intellectual or developmental disabilities.

Discretionary Grants

American Red Cross: \$2,500 – Maui Wildfire Relief

Bisbee Coalition for the Homeless: \$10,000 – Operations support

Bisbee Coalition for the Homeless: \$10,000 – Operations support, Phase 2

Boys & Girls Club of Bisbee: \$1,000 – DEI training

Canelo Cowboy Church: \$5,000 - Sonoita Food Pantry Expansion

Cochise Harm Reduction: \$3,200 – Gift cards for Overdose Prevention Indicators survey

Cowboy Christian Ministries: \$1,000 – Food Pantry event

Echoing Hope Ranch: \$1,000 – DEI training

Ecotopia: \$12,500 – Bisbee Bikeways Salary

HOPE, Inc: \$2,350 – Ice Machine

Iglesia Bautista Del Sur Amist: \$6,280 - Commercial stove and refrigerator

Premier Alliances: \$5,000 – Unexpected building renovation expenses

San Simon Fire District: \$24,819.77 – Heart Monitor

Sunrise Rotary: \$4,000 – Matching grant for Echoing Hope Ranch's Aquatics Project

Town of Huachuca City: \$2,650 – Summer Meals Program



Sonoita, Arizona food pantry housed in a new 10 ft. by 20 ft. structure funded with a discretionary grant

The Legacy Foundation offers education to nonprofit organizations in a number of different ways.

Technical Support

Each month, the Legacy Foundation offers one-on-one technical support for nonprofits. Bring yourself, gather your team, bring board members to glean great knowledge from great subject matter experts. FREE!

Technical support is offered in:

- **Board Governance:** Dr. Lanny Kope brings years of successful Board experience to the table, just for you! If you have questions about CEO/board relations, recruiting successful boards, problem board members, bylaws, policies or more, Dr. Kope has the answer!
- **Grant Writing & Research:** Melanie Greene shares her expertise on how to write a grant for success, how to search and find grants, and answer other grant questions you may have. If you need help, she's here for you!
- **Finance and Budgeting:** Bruce Norton shares his many years of experience in nonprofit finance to help you build budgets, explain financial reports, or answer other finance questions. If you have questions, he's here to help!
- **Fundraising:** Deb Dale makes fundraising fun. Deb has successfully raised millions of dollars as a Certified Fund Raising Executive (CFRE) and is available via Zoom to help you put some fundraising tools in your toolbox.

One hour appointments are available in-person or by Zoom. In-person appointments are located at the Outreach Center, 302-02 El Camino Real in Sierra Vista.

To schedule an appointment call: 520-335-6015.

GrantWatch

GrantWatch is a secure online directory of currently available grants. Search for USA, federal, state, local, foundation, and corporate grants. Use keywords to focus on specific topics and locations. Nonprofits are invited to take advantage of the Legacy Foundation's subscription to GrantWatch and schedule a 2-hour appointment to search GrantWatch for funding opportunities. Users must be onsite at the Outreach Center to access the directory.

Legacy Foundation Resource Guide

The Legacy Foundation puts over 500 community resources into a colorful, user-friendly, searchable, portable, one-stop-shop for anyone looking for services in Cochise and eastern Santa Cruz Counties. It's free and can be found at the Apple App Store, Google Play Store, or at <https://legacyfoundationresourceguide.org>



Community Dashboard

Grant applications often require data supporting the need for the funding request. Nonprofit organizations can find the data they need on the Community Dashboard. The Community Dashboard is an interactive site that presents data specific to Southeast Arizona. Available on the Legacy Foundation website, www.lfsaz.org, the Community Dashboard offers both local and national data.

Happy Retirement to Joe Delgado

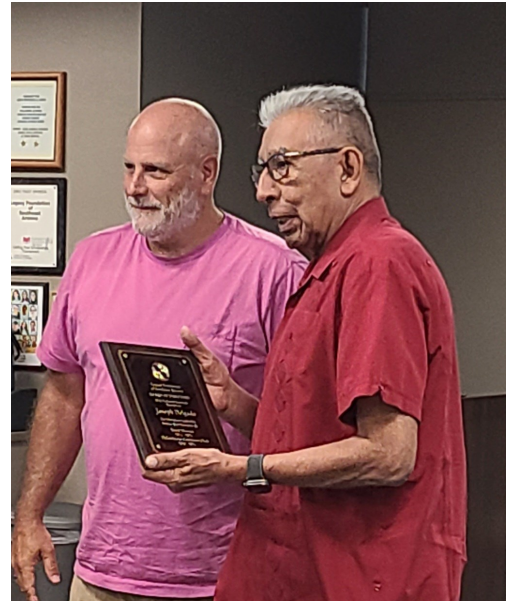
The Board of Directors of the Legacy Foundation bid a fond farewell to Board Director Joe Delgado at the June Board meeting. Mr. Delgado, from Bisbee, completed his third and final term on the Board at the end of June after ten years of dedicated service to the Foundation. Mr. Delgado began on the Board in 2014, just a year after the inception of the Legacy Foundation.

Joe was a member of the Philanthropy Committee, committed to hours of reading and reviewing pages of grant applications in preparation for funding decisions. He chaired the Philanthropy Committee from 2020-2024.

Margaret Hepburn, CEO of the Legacy Foundation commented;

“Joe Delgado has been an amazing Legacy Foundation Board director. He has served faithfully on the Philanthropy Committee and has been a very engaged Board director. Joe has been a role model for other Board directors and an exceptional mentor for new directors. Joe will be sadly missed by the Board and certainly by me personally”.

Mr. Delgado was nominated for and became an Board Director Emeritus in July.



Board Chair, Michael Groves, presents Joe Delgado with a plaque recognizing his years of service



Board Chair, Michael Groves, presents Joe Delgado as a Board Director Emeritus



Joe Delgado with Legacy Board Directors and staff

Board of Directors



Michael Groves
Chair
Staff Software Engineer,
Sailpoint Technologies
U.S. Army (Ret.)



Mark H. Savage, JD
Vice-Chair
Fire Chief,
Fry Fire District



Andrea Ruble, FNP-BC
Secretary
Advanced Wound Care Center,
Canyon Vista Medical Center



Margaret Hepburn, RN, MS
FACHE,
Chief Executive Officer



Alexandra Boneo
Owner,
Blueberry Cafe



Joe Delgado
State Farm Insurance
Agent, (Ret.)



Polly Gosa, MSN, RN
Faith Community Nurse



Maureen Kappler,
CCHC, CDE
Bisbee H.S. Teacher,
NDMA Trauma Team



Sharon Reynolds
Accounting Manager
Wellness Connections,
(Ret.)



Iwona Snyder, MSN, RN
Realtor
Sierra Vista Realty



Devyn Thurber,
MSN, MPH, PPCNP-BC
Chiricahua Community
Health Centers, Inc.



Lana Tompkins-Stutzman
BNL Skill Builders



Robert White
U.S. Army (Ret.)

Legacy Foundation Staff



Margaret Hepburn,
RN, MS, FACHE,
Chief Executive Officer



Julie Brooks
Executive Assistant



Barbara Nichols
Grants Manager
Office Coordinator



Becky Smyth,
MSN, RN, FCN,
Community Outreach
Coordinator



Susan Richards
Receptionist,
Data Clerk

In FY24 several staffing changes took place.

Julie Brooks was welcomed in as the Executive Assistant to Margaret Hepburn. Barbara Nichols became Grants Manager and Office Coordinator. Becky Smyth reduced her hours to part-time, continuing as Community Outreach Coordinator. Susan Richards reduced her hours to part-time, continuing as Receptionist and Data Clerk.



*Legacy Foundation
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