

STATE OF ARIZONA

Joint Legislative Budget Committee

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JOINT LEGISLATIVE BUDGET COMMITTEE

Thursday, November 13, 2008

9:30 A.M.

Senate Appropriations, Room 109

MEETING NOTICE

- Call to Order
- [Approval of Minutes of October 2, 2008](#)
- DIRECTOR'S REPORT (if necessary).
- 1. [AHCCCS - Review of Proposed Acute Care and ALTCS Capitation Rate Changes.](#)
- 2. [JLBC STAFF - Consider Approval of Index for School Facilities Board Construction Costs.](#)
- 3. [ARIZONA BOARD OF REGENTS - Review of FY 2009 Tuition Revenues.](#)
- 4. [STATE COMPENSATION FUND - Consider Approval of Calendar Year 2009 and 2010 Budgets.](#)

The Chairman reserves the right to set the order of the agenda.

11/6/08

sls

People with disabilities may request accommodations such as interpreters, alternative formats, or assistance with physical accessibility. Requests for accommodations must be made with 72 hours prior notice. If you require accommodations, please contact the JLBC Office at (602) 926-5491.

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MINUTES OF THE MEETING

JOINT LEGISLATIVE BUDGET COMMITTEE

October 2, 2008

The Chairman called the meeting to order at 9:38 a.m., Thursday, October 2, 2008, in Senate Appropriations Room 109. The following were present:

Members:	Senator Burns, Chairman	Representative Pearce, Vice-Chairman
	Senator Aguirre	Representative Adams
	Senator Garcia	Representative Biggs
	Senator Verschoor	Representative Boone
	Senator Waring	Representative Cajero Bedford
		Representative Lopez
		Representative Rios
		Representative Yarbrough

Absent: Senator Aboud
Senator Harper

APPROVAL OF MINUTES

Hearing no objections from the members of the Committee to the minutes of August 12, 2008, Chairman Burns stated that the minutes would be approved.

DIRECTOR'S REPORT

Mr. Stefan Shepherd, Deputy Director, JLBC, gave a presentation on the Budget Update. (*See Attachment 1*)

Mr. James Apperson, Deputy Chief of Staff, Governor's Office, gave a presentation on the Governor's Budget Management Plan Scenarios. (*See Attachment 2*)

DEPARTMENT OF EDUCATION

A. Review Proposed Transfer of Funds from Basic State Aid to the Structured English Immersion Fund under A.R.S. § 15-901.03.

Mr. Steve Schimpp, JLBC Staff, stated that the chairman is requesting Committee consideration of a transfer of approximately \$650,000 from Basic State Aid to the Structured English Immersion Fund. The FY 2009 budget includes \$40.6 million for this item. The Department of Education (ADE), however, has received some revised requests from districts as well as restoration of federal impact aid monies that ADE now indicates should not have been deducted in prior calculations and as a result believes it needs another \$646,300 to fully fund this program.

(Continued)

Mr. John Stollar, Associate Superintendent of Accountability, Department of Education, responded to member questions.

Representative Pearce moved that the Committee give a favorable review to the transfer of \$646,300 from Basic State Aid to the Structured English Immersion Fund. The motion carried.

B. Review of Joint Technological Education District Intergovernmental Agreements.

Mr. Schimpp stated that this item is a review of the Joint Technological Education District (JTED) Intergovernmental Agreements (IGAs) that have been developed with the member school districts and affiliated community college districts. The JLBC Staff recommends a favorable review of the submitted IGAs.

Representative Pearce moved that the Committee give a favorable review of the submitted JTED IGA's. In addition, the Committee requires the JTEDs to: 1) submit to the Committee by December 30, 2008 the data that is missing in the Cost Summary that was given to the Committee for review, and 2) Include in all subsequent IGA's: (a) non-supplanting worksheets pursuant to USFR Memo 219, and (b) subtotals for district, JTED and community college funding for each member district's JTED courses as a whole. The motion carried.

C. Report of Plan to Fund AIMS Study Guides with Achievement Testing Monies.

Mr. Schimpp stated that this item is for information only. The Department of Education is reporting that they plan to use some unused achievement monies to fund AIMS study guides as they have done in the past.

DEPARTMENT OF ECONOMIC SECURITY - Review of Requested Transfer of Appropriations and Report on Additional Domestic Violence Shelter Fund and Child Support Enforcement Administration Fund Spending.

Mr. Jay Chilton, JLBC Staff, stated that this item is a review of requested transfer of appropriations for the Department of Economic Security (DES). DES intends to transfer \$58 million General Fund dollars from the Day Care Subsidy Special Line Item (SLI) to Temporary Assistance for Needy Families (TANF) Cash Benefits SLI and \$58 million TANF dollars from the TANF Cash Benefits SLI into the Day Care Subsidy SLI. The total funding does not change. This is required for DES to meet its federal matching requirement for the TANF block grant.

The second piece is a Tribal Pass -Through transfer. Earlier this year the San Carlos Apache Tribe started operating its own TANF program. DES intends to transfer just under \$800,000 from the TANF Cash Benefits SLI to the Tribal Pass-Through SLI to cover the San Carlos Apache Tribe TANF program. These 2 items require Committee review.

The final 2 items on Domestic Violence and Child Support do not require Committee review.

Representative Pearce moved that the Committee give a favorable review to the following transfer of funds for the Department of Economic Security:

- *\$58,000,000 General Fund from the Day Care Subsidy SLI to the TANF Cash Benefits SLI and a corresponding transfer of \$58,000,000 of TANF Block Grant monies from the TANF Cash Benefits SLI to the Day Care Subsidy SLI.*
- *\$793,600 General Fund from the TANF Cash Benefits SLI to the Tribal Pass-Through SLI.*

The motion carried.

ARIZONA DEPARTMENT OF ADMINISTRATION - Review of Risk Management Deductible.

Mr. Dan Hunting, JLBC Staff, stated that statute requires the Joint Legislative Budget Committee to annually review deductible amounts charged to agencies for risk management losses as submitted by the Arizona Department of Administration (ADOA). ADOA recommends a continuation of the current \$10,000 deductible.

(Continued)

Representative Pearce moved that the Committee give a favorable review to the \$10,000 deductible amount. The motion carried.

DEPARTMENT OF HEALTH SERVICES - Review of Children's Rehabilitative Services Capitation Rate Changes.

Mr. Art Smith, JLBC Staff, stated that this item is a review of Department of Health Services (DHS) capitation rate changes for the Children's Rehabilitative Services population. The proposed capitation rates actually cost less than the budgeted amount and would save the General Fund approximately \$1.4 million in FY 2009.

Representative Pearce moved that the Committee give a favorable review to the change in the Children's Rehabilitative Services capitation rate. In addition, the Committee requires that any capitation rate savings be reverted and not transferred for program expansions or to offset lump sum reductions. The motion carried.

Mr. Richard Stavneak, Director, JLBC, stated that the following items are for informational purposes only. The Chairman wants to understand what the financial consequences are and how we are going to resolve this year's shortfall before moving forward with these items.

AHCCCS - Review of Proposed Acute Care and ALTCS Capitation Rate Changes -- Agency Request (Information Only).

Ms. Amy Upston, JLBC Staff, stated that this item is a review of the capitation rates for the AHCCCS Acute Care and Long Term Care programs. Using budgeted caseload growth, JLBC Staff expect that these 2 programs will cost the General Fund approximately \$34 million more than was initially budgeted.

Mr. Tom Betlach, Deputy Director, AHCCCS, responded to member questions.

ARIZONA BOARD OF REGENTS - Review of FY 2009 Tuition Revenues -- Agency Request (Information Only).

Ms. Leah Kritzer, JLBC Staff, stated that this item is the Arizona Board of Regents' report on tuition revenues for FY 2009 which is an information only item. Appropriated tuition collections for FY 2009 were estimated at \$481.4 million. The universities now estimate they will receive \$538.1 million, or an increase of \$56.7 million.

Ms. Christine Thompson, Assistant Executive Director, Government Affairs, Arizona Board of Regents, responded to member questions.

JLBC STAFF - Index for School Facilities Board Construction Costs -- Agency Request (Information Only).

Ms. Leatta McLaughlin, JLBC Staff, stated that this item is for information only. This item provides information on possible construction cost indices for the School Facilities Board new school construction and building renewal formulas.

Mr. John Arnold, Director, School Facilities Board, responded to member questions.

EXECUTIVE SESSION - Arizona Department of Administration - Risk Management Annual Report

Due to a lack of a quorum, no action was taken on this item. The Chairman believed the item could wait until the next meeting.

Without objection, the meeting adjourned at 12:08 p.m.

Respectfully submitted:

Sandy Schumacher, Secretary

Richard Stavneak, Director

Senator Bob Burns, Chairman

NOTE: A full audio recording of this meeting is available at the JLBC Staff Office, 1716 W. Adams. A full video recording of this meeting is available at <http://www.azleg.gov/jlbc/meeting.htm>.

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DATE: November 6, 2008

TO: Senator Bob Burns, Chairman
Members, Joint Legislative Budget Committee

THRU: Richard Stavneak, Director

FROM: Amy Upston, Senior Fiscal Analyst

SUBJECT: AHCCCS – Review of Proposed Acute Care and ALTCS Capitation Rate Changes

Request

Pursuant to a footnote in the General Appropriation Act, the Arizona Health Care Cost Containment System (AHCCCS) is required to report capitation and fee-for-service inflationary rate changes with a budgetary impact to the Committee for review prior to implementation.

This memo has a few modifications from the October 2, 2008 meeting including that it will now be considered for review.

Recommendation

The Committee has at least the following 2 options.

1. A favorable review of the proposed changes as the proposed rates are a combination of actuarial inflation adjustments and legislatively authorized policy changes.
2. An unfavorable review of the proposed changes as the proposed increases are higher than budgeted.

The proposed rates would cost \$27.0 million more from the General Fund than budgeted in FY 2009, assuming budgeted caseloads. The \$27.0 million unbudgeted cost represents a shortfall of \$27.6 million in Acute Care and a \$0.6 million surplus in the Long-Term Care program. The \$27.0 million has been updated since our original memo, based on additional analysis.

However, the current overall AHCCCS shortfall due to both rates and caseload growth is near \$50 million.

(Continued)

Analysis

Acute Care

This population represents members who participate in the Traditional Medicaid, Proposition 204, and KidsCare and KidsCare Parents programs.

In FY 2009, the approved Acute Care budget estimated capitation rate growth at 6.0%. AHCCCS states that the increase in the contract year ending (CYE) in 2009 will be higher at 8.7%. Based on enrollment projections used in developing the FY 2009 appropriation, this would cost \$27.6 million more than budgeted from the General Fund (\$68.3 million in Total Funds). *Table 1* shows the proposed capitation rates for each patient group.

<u>Populations</u>	Monthly Regular Capitation Rates			
	<u>Current CYE 08 Rate</u>	<u>Budgeted CYE 09 Rate</u>	<u>Proposed CYE 09 Rate</u>	<u>CYE 08-CYE 09 % Change</u>
<u>Traditional Medicaid/KidsCare</u>				
Age<1	\$ 525.88	\$ 564.90	\$ 534.00	1.5%
Age 1 – 13	109.66	115.52	110.07	0.4
Age 14 - 44 (Female only)	218.18	229.05	244.07	11.9
Age 14 - 44 (Male only)	144.89	152.90	149.94	3.5
Age 45+	387.95	407.77	407.54	5.0
SSI with Medicare	161.35	170.44	156.71	(2.9)
SSI without Medicare	698.12	735.23	733.28	5.0
Family Planning	18.38	19.48	19.03	3.5
Deliveries	6,583.36	6,978.36	6,635.02	0.8
<u>Title XIX Waiver Group</u>				
Prop 204 – Conversions	\$ 503.67	\$ 518.78	\$ 618.41	22.8%
Prop 204 - Medically Eligible	1,194.14	1,178.43	2526.15	111.5
Prop 204 - Newly Eligible	499.69	518.78	618.41	23.8
Hospital “Kick” Payment	10,858.49	11,510.00	0.00	(100.0)
Acute Care Weighted Average				8.7%
<u>ALTCS</u>				
Statewide Average Rate	\$3,206.95	\$3,361.88	\$3,287.12	2.5%

Relative to the enacted budget, the \$27.6 million in proposed changes include an additional increase of \$18.6 million for trends in service utilization and medical inflation, a \$15 million increase in reinsurance, and \$(6) million in greater than expected savings from policy changes. For CYE 2009, AHCCCS reports anticipated increases across all populations with the exception of those eligible for both SSI and Medicare.

AHCCCS estimates that changes in the reinsurance policy will have a first-year impact on their budget of \$15 million. Reinsurance represents payments made to health plans for patients with unusually high costs. After a certain deductible has been met, AHCCCS will pay 75%-85% of the cost of service until it reaches \$650,000. After this level, AHCCCS will pay 100% of the cost.

For CYE 2009, one of the largest health plans has elected to increase their deductible from \$20,000 to \$35,000. There is a relationship between capitation rates and deductibles. When health plans are willing to take on higher deductibles, they are compensated with higher capitation rates.

The higher capitation rates and lower reinsurance costs should be cost neutral overall, but some of the reinsurance savings will not be realized until FY 2010 or FY 2011 due to the lag in encounter

(Continued)

submissions from the health plans. AHCCCS estimates that this change will result in a net General Fund cost of \$15.0 million in FY 2009, and a savings of \$(14.8) million in FY 2010 and \$(0.2) million in FY 2011.

Policy Changes

A.R.S. § 36-2901.06 limits capitation rate adjustments to utilization and inflation unless those changes are approved by the Legislature or are specifically required by federal law or court mandate. In addition to standard adjustments for utilization and medical inflation trends, the following program changes have been incorporated into the capitation rates:

- Hospice Services – Legislation passed in 2007 allowed AHCCCS to cover hospice services for Acute Care members. AHCCCS estimates the cost of providing hospice services is \$1,023,600 from the General Fund (\$3,000,000 in Total Funds) on a full-year basis. The FY 2009 budget did not include additional costs for hospice services, and it does not appear that AHCCCS offset this cost by taking savings elsewhere.
- HPV Vaccine – Federal law requires that AHCCCS cover the cost of the human papillomavirus (HPV) vaccine for female AHCCCS members under age 21 who elect to receive the vaccine. The cost for providing the vaccine to AHCCCS members under age 19 is paid by the Department of Health Services. AHCCCS includes \$324,100 from the General Fund to provide the vaccine to newly enrolled female AHCCCS members ages 21-26. The FY 2009 budget had included \$183,800 from the General Fund for this purpose.
- Outlier Methodology Revision – The FY 2008 budget directed AHCCCS to revise the methodology used to pay hospital claims with significantly high operating costs known as “outliers.” These claims are paid by applying a cost-to-charge ratio that is used to approximate the hospital’s actual cost of providing the services. FY 2009 begins the second year of a 3-year phase in for the revised methodology. This revision led to an AHCCCS-estimated General Fund savings of \$(12,264,400) in FY 2009. The FY 2009 budget had assumed savings of \$(5.7) million for this revision.
- Hospital Reimbursement Rates – The Health and Welfare Budget Reconciliation Bill prohibited increases in specific hospital reimbursement rates for FY 2009. This policy leads to an AHCCCS-estimated General Fund savings of \$(11,259,600). The FY 2009 budget had assumed savings of \$(11.8) million for this purpose.
- Children’s Rehabilitative Services – AHCCCS is shifting the responsibility for payment of specific services to the Children’s Rehabilitative Services (CRS) contractor when those services are directly related to a member’s CRS condition. This will result in a General Fund savings of approximately \$(341,200) in the AHCCCS capitation rates. This should have a corresponding increase of the same amount in the CRS capitation rates, but CRS has incorporated \$412,200 into their budget for providing these services. The FY 2009 budget did not include this savings.

Long-Term Care (ALTCS)

ALTCS services are provided to the elderly and physically disabled in need of long-term care either in nursing care facilities or in home and community-based settings.

The approved FY 2009 budget provided for a 4.8% capitation rate increase. Based on enrollment projections used in developing the FY 2009 appropriation, this proposed increase would cost \$564,400 less than budgeted from the General Fund and \$920,800 less from counties (\$4.4 million in Total Funds).

Policy Changes

The primary policy changes in ALTCS capitation rates result from providing preventive adult dental services and hospital reimbursement rates.

- Non-Emergency Dental Services – Legislation signed into law in 2007 required AHCCCS to provide non-emergency (basic and preventive) dental services for ALTCS adults up to \$1,000 annually. The

(Continued)

FY 2009 budget did not renew this provision, thus providing an AHCCCS-estimated General Fund savings of approximately \$(1,463,700). The budget had assumed savings of \$(1.7) million for adult dental services.

- Hospital Reimbursement Rates – The Health and Welfare Budget Reconciliation Bill prohibited increases in specific hospital reimbursement rates for FY 2009. This policy leads to an AHCCCS-estimated General Fund savings of \$(1,023,600). The FY 2009 budget had assumed savings of \$(700,100) for this purpose.

The capitation rate change also includes small adjustments for the outlier methodology revision and shifting services to CRS.

RS/AU:ss



AHCCCS

Janet Napolitano, Governor
Anthony D. Rodgers, Director

Our first care is your health care

ARIZONA HEALTH CARE COST CONTAINMENT SYSTEM

September 11, 2008

The Honorable Robert Burns, Chairman
Joint Legislative Budget Committee
1700 West Washington
Phoenix, Arizona 85007



Dear Senator Burns:

The Arizona Health Care Cost Containment System (AHCCCS) respectfully requests to be placed on the agenda of the next Joint Legislative Budget Committee (JLBC) meeting to review the following items.

- Long Term Care Capitation Rates for Contract Year Ending 2009
- Acute Care Capitation Rates for Contract Year Ending 2009

As required by the Federal Balanced Budget Act of 1997, Title XIX and Title XXI Managed Care Programs must have actuarially sound capitation rates. The following proposed rate adjustments are in the process of being reviewed by the Centers for Medicare and Medicaid Services (CMS) for an October 1, 2008 implementation.

Long Term Care Capitation Rates

For State Fiscal Year 2009 AHCCCS was appropriated an increase of 6.0% for ALTCS rates. In March 2008 AHCCCS estimated that the ALTCS increase would be in the range of 4.0-6.0%. The proposed rates for the new contract cycle came in below these estimates increasing at a rate of 2.5%.

There are two main factors that impacted the rates and resulted in an actual increase less than the estimate. The program continues to see a favorable mix change as a larger percentage of members moved into Home and Community Based Settings (HCBS). Since 1999 the ALTCS program has seen a shift from 43% of the population in HCBS to the projection for Contract Year Ending (CYE) 2009 of 65.3%. The second factor impacting the rate of increase was a 10.2% decrease that was applied to the acute care component of the rate reflecting a decreased trend and the implementation of several legislatively approved policy issues including elimination of dental benefits, outlier changes and the mandated hospital rate freeze.

These rate adjustments reflect the Elderly and Physically Disabled population and do not include the Developmentally Disabled population, which is administered through the Arizona Department of Economic Security. The actuarial memo that has been submitted to CMS for approval is attached for additional information.

As detailed in the attached graph the five year average for ALTCS EPD rates is 5.9%.

Senator Burns
September 12, 2008
Page 2

Acute Care Capitation Rates

The State Fiscal Year 2009 budget assumed a 6.0% overall increase in Acute Care capitation rates. As was indicated in the letter submitted to JLBC on March 1, 2008, the AHCCCS program had to competitively bid the Managed Care Organization (MCO) network for the program this past year. In a letter dated May 30, 2008, AHCCCS provided an update to the JLBC estimating that Acute care capitation rates were expected to increase an average of 8.2% but that the final number would be subject to "further legislative adjustments and final health plan reinsurance level adjustments".

The overall weighted increase for CYE 2009 Acute Care capitation rates is 8.69%. Two significant adjustments occurred since the May 30, 2008 update. The rates were decreased 109 basis points to account for legislative changes with the majority of the decrease resulting from the mandated hospital rate freeze. This decrease was offset by a 156 basis point increase to account for the selected reinsurance levels chosen by the awarded MCO's. For the past ten years AHCCCS has provided the MCOs with the ability to select reinsurance levels of \$20,000, \$35,000 and \$50,000. Based on the reinsurance levels selected an estimated 38% of the CYE 2009 population will be at the \$20,000 level while in CYE 2008, 74% of the population was at the \$20,000 reinsurance level.

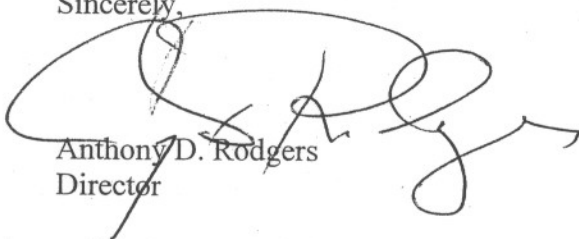
As detailed in the attached graph, the 5 year Acute Care annual average capitation rate has increased by 6.7%.

Policy Changes

Per the legislative mandate in ARS 36-2901.06 and 36-2941 AHCCCS has not included any changes beyond the limits that are now delineated in law.

Should you have any questions on any of these issues please feel free to contact Tom Betlach at (602) 417-4483.

Sincerely,

A handwritten signature in black ink, appearing to read "Anthony D. Rodgers", is written over a printed name and title. The signature is stylized with a large loop at the end.

Anthony D. Rodgers
Director

c: Jim Apperson, OSPB
Richard Stavneak, JLBC

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DATE: November 6, 2008

TO: Senator Bob Burns, Chairman
Members, Joint Legislative Budget Committee

THRU: Richard Stavneak, Director

FROM: Leatta McLaughlin, Principal Fiscal Analyst

SUBJECT: JLBC Staff – Consider Approval of Index for School Facilities Board Construction Costs

Request

A.R.S. § 15-2041D.3.c requires that the cost-per-square-foot factors used in the School Facilities Board (SFB) building renewal and new school construction financing “shall be adjusted annually for construction market considerations based on an index identified or developed by the Joint Legislative Budget Committee (JLBC) as necessary but not less than once each year.”

The SFB Staff is requesting that the Committee approve an adjustment for FY 2009 based on an average of 2 Phoenix Metropolitan marketplace indices developed by a project management firm and a construction consulting group.

This memo is essentially unchanged from the October 2, 2008 meeting except this item will now be considered for possible approval.

Recommendation

The Committee has at least the following 4 options (options 2 and 4 exclude the implementation of Full-Day Kindergarten as it is only becoming effective with the FY 2009 budget):

1. Approve a 5.14% increase in the cost-per-square-foot factors as requested by SFB Staff. Approving this adjustment may generate \$392,200 in FY 2009 new construction costs and \$17.0 million in additional costs through FY 2013. The SFB requested percentage is based on Phoenix-area construction costs in the last year. The adjustment would increase the building renewal formula cost by \$11.1 million in FY 2010. Formula increases, however, do not occur automatically and are subject to legislative appropriation.
2. Approve a 5.14% increase in the cost-per-square-foot factors *excluding* the implementation of Full-Day Kindergarten (FDK) capital costs. Approving this adjustment may generate \$9.1 million in additional costs from FY 2010 through FY 2013. This option would not generate additional FY 2009 costs since FDK capital costs would not be implemented. The adjustment would increase the building renewal formula cost by \$11.1 million in FY 2010. Formula increases, however, do not occur automatically and are subject to legislative appropriation.

(Continued)

3. Approve a 1.98% increase in the cost-per-square-foot factors, which is based on general inflation as measured by the Gross Domestic Product implicit price deflator (GDP deflator) in the last year. Approving this adjustment may generate \$151,100 in FY 2009 new construction costs and \$6.5 million in additional costs through FY 2013. The adjustment would increase the building renewal formula cost by \$4.3 million in FY 2010. Formula increases, however, do not occur automatically and are subject to legislative appropriation.
4. Approve a 1.98% increase in the cost-per-square-foot factors *excluding* the implementation of FDK capital costs. Approving this adjustment may generate an additional \$3.5 million in additional costs from FY 2010 through FY 2013. This option would not generate additional FY 2009 costs since FDK capital costs would not be implemented. The adjustment would increase the building renewal formula cost by \$4.3 million in FY 2010. Formula increases, however, do not occur automatically and are subject to legislative appropriation.

Table 1 lists the current dollar per square foot amounts and Options 1 through 4, while Table 2 summarizes the potential additional cost associated with each option.

Table 1			
Dollars per Square Foot Amounts for Each Option			
	<u>K-6</u>	<u>7-8</u>	<u>9-12</u>
Current Amount	\$134.01	\$141.47	\$163.81
Options 1 & 2 - Construction index (5.14%)	\$140.90	\$148.74	\$172.23
Options 3 & 4 - GDP deflator (1.98%)	\$136.66	\$144.27	\$167.05

Table 2			
FY 2009 Options - Potential Costs			
(\$ in Millions)			
	<u>FY 2009 New</u>	<u>FY 2010 – FY 2013</u>	<u>FY 2010 Building</u>
	<u>Construction Cost</u>	<u>New Construction Cost</u>	<u>Renewal Cost</u>
Option 1 – 5.14%	\$0.4	\$16.6	\$11.1
Option 2 – 5.14%, no FDK	\$0.0	\$9.1	\$11.1
Option 3 – 1.98%	\$0.2	\$6.3	\$4.3
Option 4 – 1.98%, no FDK	\$0.0	\$3.5	\$4.3

SFB has the statutory authority to fund projects above these square foot amounts if a district cannot build a school within the New School Facilities (NSF) formula amount. In FY 2007, SFB funded 86% of their projects over the funding amount for a total of \$33.4 million. In FY 2008, SFB funded 90% of their projects over the formula amount for a total of \$31.1 million. Over the past 2 years, SFB has given additional inflationary funding of about \$1.5 million to each of these projects.

New Construction Moratorium

A moratorium on new construction projects was authorized for FY 2009 by the FY 2009 Education Budget Reconciliation Bill (Laws 2008, Chapter 287). The bill prohibits SFB from authorizing or awarding funding for the design or construction of any new school facility, except for FDK or for school site acquisition in FY 2009. The moratorium was enacted due to declines in the state's housing market and the state's population growth rate. The moratorium also requires SFB to provide monies for architectural and engineering fees, project management services, and preconstruction services if a school district qualifies for additional space in FY 2009 due to the implementation of FDK. It also requires school districts to submit capital plans during FY 2009 and permits SFB to review and award new school projects subject to future appropriations. During the FY 2009 approval cycle, SFB expects to approve \$152.6 million worth of FDK space and \$177.3 million worth of non-FDK new construction projects for a total of \$329.9 million in approvals.

(Continued)

Analysis

This section includes background information regarding the SFB inflation index, details on rising construction costs, an explanation of the options available for the current adjustment, and discussion on SFB's guidelines for funding new school construction projects.

Background Information

The original Students FIRST legislation (Laws 1998, Chapter 1, 5th Special Session) established funding amounts per square foot of space for new construction and building renewal (e.g., \$90 per square foot for Grades K-6). It required, however, that those amounts be adjusted periodically for inflation. The latter provision states that the funding amount per square foot "shall be adjusted annually for construction market considerations based on an index identified or developed by the JLBC as necessary but not less than once each year" (A.R.S. § 15-2041D.3c). SFB also has statutory authority to modify a particular project cost per square foot for geographic factors or site conditions above the approved amounts.

Prior to 2002, the Committee used the Marshall Valuation Service (MVS) construction cost index for Class C structures (masonry bearing walls) for Phoenix. At the August 2002 meeting, the Committee elected not to approve an adjustment in the cost-per-square-foot factors. Due to the decision not to approve an adjustment for that year, 5 school districts brought suit against the Committee, claiming the Committee had failed to perform its statutory duty under A.R.S. § 15-2041D.3c to adjust the index not less than once per year. The following year, at the September 2003 meeting, the Committee approved a 2-year adjustment. The adjustment made was based on the Bureau of Economic Analysis (BEA) index for "State and Local Government Investment - Structures." The Committee again approved the BEA index at the September 2004 meeting. At the October 2005 meeting, the Committee approved an adjustment based on a midpoint between the BEA and MVS indices, which was higher than actual prior year inflation under either index, to account for the high rate of growth in construction costs over the past few years. Two years ago at its October meeting, the Committee adopted an average of the same 2 indices that the SFB Staff is recommending this year (see below). Last year at its October meeting, the Committee adopted the PinnacleOne index, which is 1 of the 2 indices the SFB Staff has requested the Committee adopt this year.

For building renewal, the inflation adjustment is applied to the *formula* amount. In FY 2009 the state did not fund the building renewal formula amount and instead funded \$20 million for the new Building Renewal Grants Fund. An inflationary adjustment, therefore, would increase the building renewal full formula amount to at least \$220.2 million (based on the GDP deflator), or to \$227.0 million (based on the SFB Staff request), in FY 2010 prior to any other possible formula adjustments. Adjusting for inflation would not change the existing FY 2009 Building Renewal Grants Fund appropriation since this fund is based on grant and not formula funding.

Construction Costs

The price of construction cost inputs rose more in FY 2008 than previously expected even though the increase was not as great as it was a few years ago. For example, the price of natural gas doubled over the past year, which increases the costs of outputs, such as PVC pipe, insulation, and flooring. The slowdown in the state's construction activity, however, could serve to reduce these cost pressures. According to the U.S. Department of Labor's Bureau of Labor Statistics, there was a loss of 10% in state construction jobs in FY 2008.

Options for the Current Adjustment

The JLBC Staff has identified possible adjustments that could be considered. *Attachment 1* includes information on each of the 3 indices discussed below.

PinnacleOne and Rider Indices

The SFB Staff has requested for the third year in a row the Committee approve an adjustment based on an average of 2 Phoenix market indices developed by PinnacleOne, a project management firm, and Rider Levett Bucknall, an international construction-consulting group.

The PinnacleOne index reports inflation of 4.68% for FY 2008 and is based on the cost of an elementary school in the Phoenix area. Beginning in January 2006, this index was only developed for Phoenix and is

(Continued)

based on the cost to build a 70,000 square foot K-6 school. Input prices are updated each quarter based on conversations with their subcontractors and suppliers. Even though it measures inflation for Phoenix area elementary schools, it does not measure inflation for high schools or schools outside of the Phoenix Metropolitan area.

The Rider index reports inflation of 5.59% and includes all types of Phoenix area construction. This index tracks the bid cost of construction including labor, materials, general contractor and subcontractor overhead costs and fees, and applicable sales and use taxes. Rider develops a construction costs index for 11 major U.S. cities, including Phoenix. This index also does not measure inflation outside of Phoenix.

The average of these 2 indices is 5.14%. The total estimated new construction impact would be \$17.0 million cumulatively through FY 2013. The adjustment would increase the building renewal formula cost by \$11.1 million in FY 2010. Formula increases, however, do not occur automatically and are subject to legislative appropriation.

Gross Domestic Produce Price Deflator

The GDP deflator reports inflation of 1.98% in FY 2008 and is published by the U.S. Department of Commerce's Bureau of Economic Analysis. It measures the change in prices of all new, domestically produced, final goods and services in an economy. Unlike some price indexes, the GDP deflator is not based on a fixed basket of goods and services. The basket is allowed to change with people's consumption and investment patterns; therefore, new expenditure patterns are allowed to show up in the deflator as people respond to changing prices.

New School Construction Funding Guidelines

SFB provides new construction funding based on the product of the following statutory NSF formula:

$$\text{Number of pupils} \times \text{square foot per pupil} \times \text{cost per square foot} = \text{allocation amount}$$

SFB has the authority to provide additional funding above and beyond the statutory allocation amount to a district if it cannot build a school within the NSF formula amount. A district can prove they cannot build a minimum guidelines school by demonstrating they are building the least expensive school they possibly can but are still over the formula amount.

Since the enactment of Students FIRST, some of these projects have been funded above the formula with SFB monies. In FY 2007, SFB funded 86% of their projects over the funding amount for a total of \$33.4 million. In FY 2008, SFB funded 90% of their projects over the formula amount for a total of \$31.1 million. Over the past 2 years, SFB has given additional inflationary funding of about \$1.5 million to each of these projects.

SFB has applied the JLBC adopted inflationary adjustment to projects that are approved subsequent to the Committee's action. As a result, projects that are approved at different times but began construction at the same time might receive different funding amounts from SFB.

As advised by the Auditor General's office, SFB submitted a request to the Attorney General in November 2007 concerning their formal opinion on SFB's practice of awarding new construction projects additional monies over the statutory new construction formula amount. The Attorney General has not yet published an official opinion on this request.

RS/LMc:sls
Attachment



STATE OF ARIZONA
SCHOOL FACILITIES BOARD

Governor of Arizona
Janet Napolitano

September 9, 2008

The Honorable Robert Burns
Chairman
Joint Legislative Budget Committee
1716 West Adams
Phoenix, Arizona 85007

Executive Director

William Bell



Dear Senator Burns,

A.R.S. 15-2041, section 3(C), states in part "...The cost per square foot shall be adjusted annually for construction considerations based on an index identified or developed by the joint legislative budget committee as necessary but no less than once each year."

For FY 2009, SFB staff is requesting the committee adjust the formula by 5.14 percent. This number was derived from two indexes (attached) developed specifically for the Phoenix market. The project management firm PinnacleOne developed the first index. This index is based on the cost of an elementary school in the Phoenix metropolitan market and reports FY 2008 inflation at 4.68 percent. The second index was developed by Rider Levett Bucknall an international construction-consulting group. This index includes all types of commercial construction and sets inflation at 5.59 percent. The recommended number of 5.14 percent is the average of these two indexes.

Table one shows the impact on the cost per square foot of the recommended increase.

Table One

Grade Level	Current Amount	Adjusted Amount
K-6	\$134.01	\$140.90
7-8	\$141.47	\$148.73
9-12	\$163.81	\$172.22

SFB staff believes that this amount adequately reflects FY 2008 inflation. As shown on Attachment II, excluding local impact fees, the proposed costs per square foot would have covered the construction costs for the most recent SFB new construction projects.

Fiscal Impacts

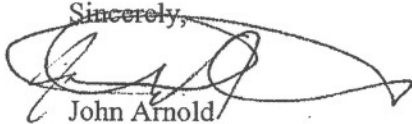
Because of the FY 2009 moratorium for new construction, the fiscal impact is limited to the full-day kindergarten program. SFB staff calculates the impact at \$385,000. Please note that anticipated inflation was included in the FY 2009 budget for full-day kindergarten awards.

The FY 2010 impact will include the construction starts of the full-day kindergarten awards and the design and constructions starts of projects awarded in FY 2009. SFB staff calculates this impact at \$3.2 million.

For building renewal, there is no FY 2009 impact. The estimated FY 2010 impact to the building renewal formula is \$11.1 million.

If you or your staff have any questions regarding this letter, please contact me.

Sincerely,

A handwritten signature in black ink, appearing to be "John Arnold", written over a horizontal line.

John Arnold

Attachments//

CC

Richard Stavneak

James Apperson

Lauren Kielsmeier

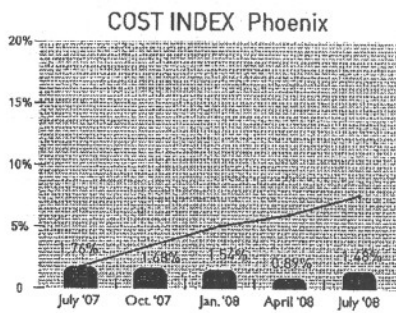
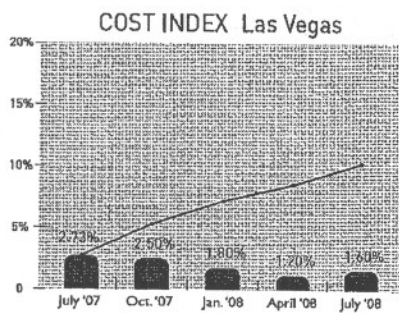
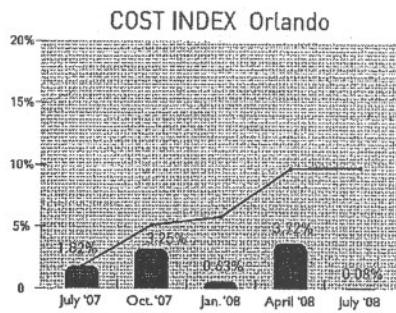
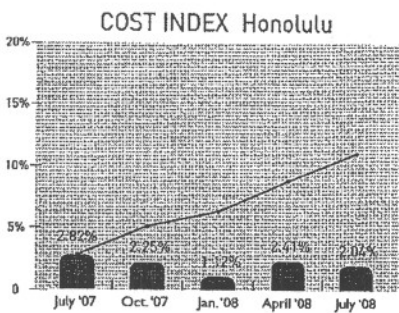
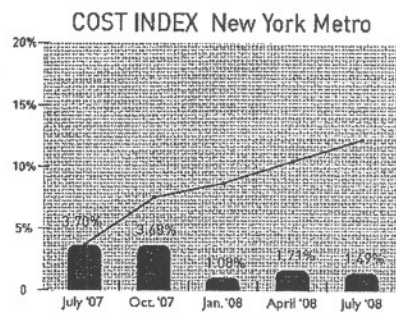
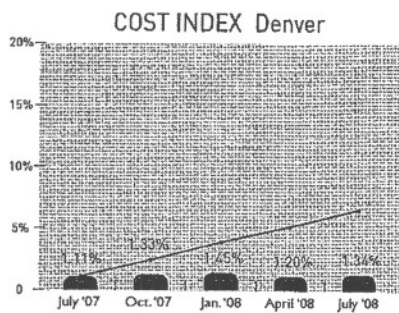
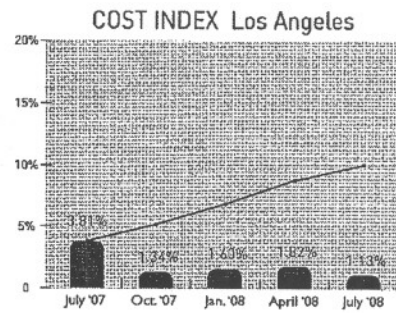
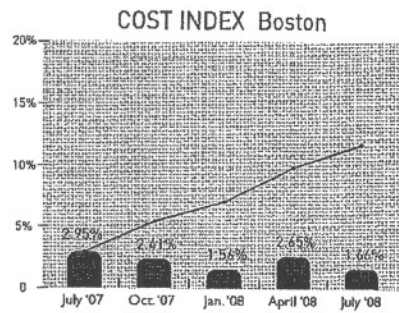


Phoenix Elementary School Building Cost (\$) /SF from FY 1998 through 2008

Fiscal Year (FY) July -June	1 Inflation Rate of Increase (PinnacleOne)	2 \$/SF of K through 6 in Greater Phoenix	3 ENR 20 city average Rate of Increase	4 \$/SF of K through 6 in 20 city average	5 Inflation Rate of Increase (Marshall Swift)	6 \$/SF of K through 6 in Greater Phoenix	7 Inflation Rate of Increase (JLBC Adopted)	8 \$/SF of K through 6 in Greater Phoenix	9 \$/SF of K through 6 by Rider Hunt in Greater Phoenix	10 % Rate of Increase
1998		\$90.00		\$90.00		\$90.00	0.00%	\$90.00	\$90.00	
1999	1.92%	\$91.73	1.92%	\$91.73	0.00%	\$90.00	3.10%	\$92.79		
2000	2.40%	\$93.93	2.40%	\$93.93	3.10%	\$92.79	5.00%	\$97.43		
2001	0.99%	\$94.86	0.99%	\$94.86	5.00%	\$97.43	0.60%	\$98.01		
2002	1.37%	\$96.16	1.37%	\$96.16	0.60%	\$98.01	0.00%	\$98.01		
2003	1.93%	\$98.01	1.96%	\$98.04	4.80%	\$102.72	4.20%	\$102.13	\$120.00	
2004	7.88%	\$105.74	7.85%	\$105.74	1.70%	\$104.46	1.40%	\$103.56	\$120.00	0%
2005	5.55%	\$111.60	5.55%	\$111.60	8.70%	\$113.55	12.85%	\$116.87	\$120.00	0%
2006	17.30%	\$130.91	3.90%	\$115.96	6.40%	\$120.82	12.20%	\$131.13	\$150.00	25%
2007	2.66%	\$134.39	2.68%	\$119.06	3.00%	\$124.45	2.20%	\$134.01	\$155.00	3%
2008	4.68%	\$140.68	3.70%	\$123.47	Not Provided	Not Provided			Not Provided	Not Provided

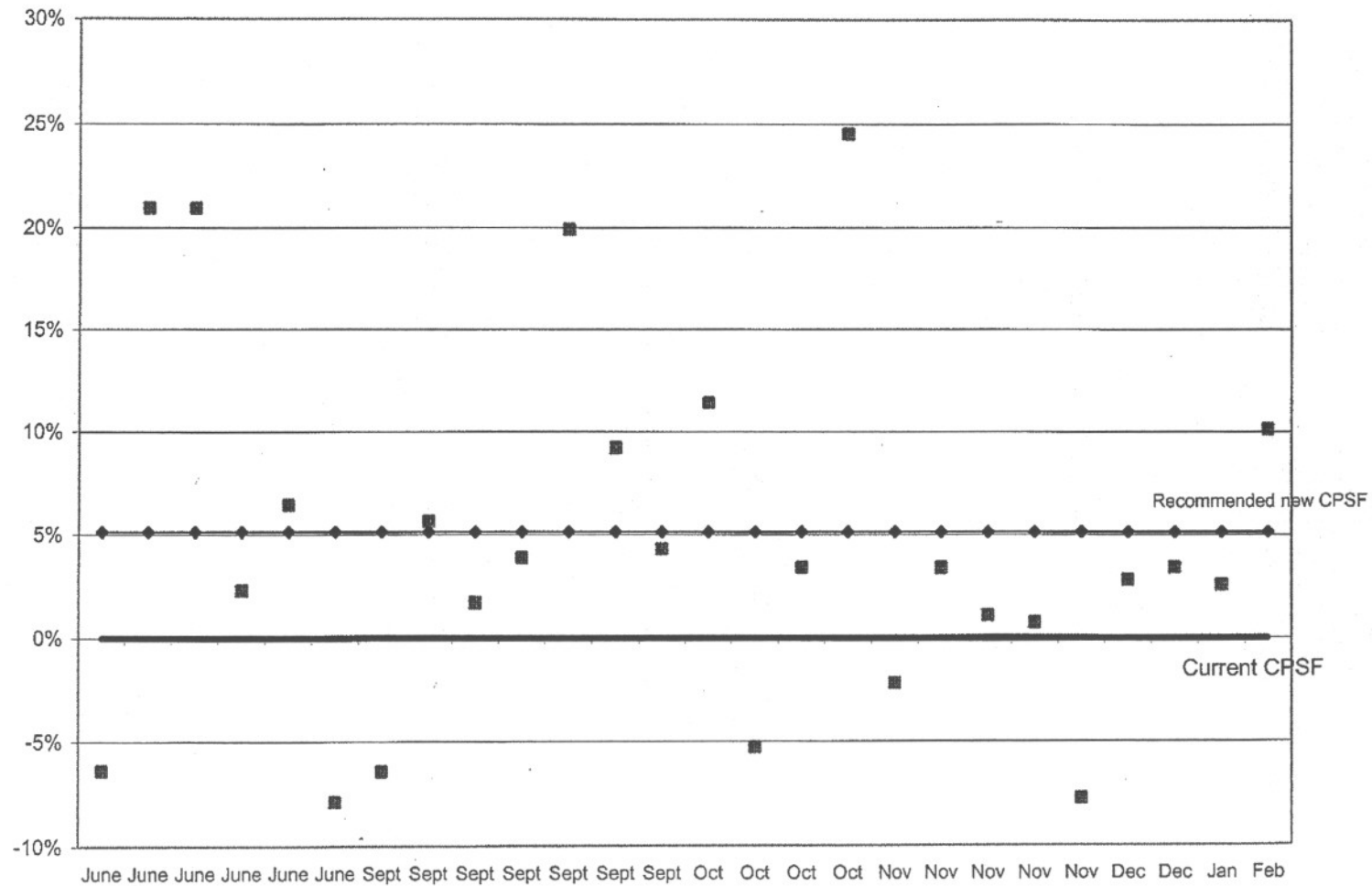
Notes:

- 1 Inflation rate per year derived from ENR and adjusted to Phoenix market.
For FY 2005 - 2006, the inflation rate was taken from Associated General Contractors for the Phoenix Market.
For FY 2007 - 2008, we used the ENR BCI index computation and applied local material prices, and prevailing wage rates.
- 2 The minimum base construction cost for FY1998 is \$90/sf and was used as a base for all indices shown.
- 3 Column 3 is the 20 City Average BCI Inflation Rate computed by ENR.
- 4 Marshall Swift Inflation Index is not available for FY 2008.
- 5 Columns 9 & 10, Rider Hunt Inflation Index and Minimum Cost/SF of Elementary School.



SFB FY 2008 New Construction Costs
Includes Adjacent Ways and Local Fees

Attachment #2



Note: The current cost per square foot was increased by 2.2 percent starting with the November projects.

STATE OF ARIZONA

Joint Legislative Budget Committee

STATE
SENATE

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CHAIRMAN 2008
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1716 WEST ADAMS
PHOENIX, ARIZONA 85007

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HOUSE OF
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STEVE YARBROUGH

DATE: November 6, 2008

TO: Senator Bob Burns, Chairman
Members, Joint Legislative Budget Committee

THRU: Richard Stavneak, Director

FROM: Leah Kritzer, Fiscal Analyst

SUBJECT: Arizona Board of Regents – Review of FY 2009 Tuition Revenues

Request

The Arizona Board of Regents (ABOR) requests Committee review of its expenditure plan for tuition revenue amounts greater than the amounts appropriated by the Legislature and all retained tuition and fee revenue expenditures for the current fiscal year.

This memo is essentially unchanged from the October 2, 2008 meeting except this item will now be considered for review.

Recommendation

The Committee has at least the following 2 options:

1. A favorable review.
2. An unfavorable review. The additional tuition revenues may be needed to offset any university reductions to reduce the FY 2009 budget shortfall.

In total, appropriated FY 2009 tuition collections are estimated to be \$538.1 million. This amount is \$69.7 million above FY 2008 and \$56.7 million above the original FY 2009 budget. The universities plan on using the additional \$56.7 million in their operating budgets to cover inflationary increases and miscellaneous academic and support planning priorities.

(Continued)

Non-appropriated, locally retained tuition and fees for FY 2009 are estimated at \$391.4 million, \$32.0 million higher than FY 2008. Of the \$391.4 million, \$251.3 million, or 64%, is dedicated to scholarships, fellowships, and financial aid. Statute allows the universities to retain a portion of tuition collections for expenditures, as approved by ABOR. These “locally” retained tuition monies are considered non-appropriated. Any remaining tuition collections are then submitted as part of each university’s operating budget request and are available for appropriation by the Legislature.

Analysis

Appropriated Tuition

Table 1 shows ABOR changes to resident and non-resident undergraduate tuition from FY 2008 to FY 2009. ABOR policy is to set undergraduate resident tuition at the top of the bottom one-third of all senior public universities.

Table 1 Arizona University System FY 2008 to FY 2009 Undergraduate Tuition and Fees Changes 1/								
	Resident				Non-Resident			
	<u>FY 2008</u>	<u>FY 2009</u>	<u>\$ Change</u>	<u>% Change</u>	<u>FY 2008</u>	<u>FY 2009</u>	<u>\$ Change</u>	<u>% Change</u>
ASU-Main	\$4,969	\$5,313 ^{2/}	\$344	6.9%	\$17,001	\$17,947	\$946	5.6%
ASU-East/West	4,766	5,099 ^{2/}	333	7.0%	16,999	17,945	946	5.6%
NAU	4,841	5,217 ^{2/}	376	7.8%	14,495	15,546	1,051	7.3%
NAU-Distance Ed.	4,623	4,850	227	4.9%	7,008	7,493	485	6.9%
UofA-Main/HSC	5,037	5,531	494	9.8%	16,271	18,665	2,394	14.7%
UofA-South	4,461	4,804	343	7.7%	16,216	18,609	2,393	14.8%

1/ The amounts represent combined full-time tuition for fall and spring semesters, as well as mandatory fees. Undergraduates must take at least 12 credit hours to qualify for full-time status. Mandatory fees include AFAT and student recreation charges, but do not include special class or program fees.

2/ These amounts represent tuition and fees for continuing students enrolled prior to fall 2008. For students starting in the fall of 2008, the following tuition and fees will be charged: ASU Main Resident - \$5,659, ASU East & West Resident - \$5,659, NAU Flagstaff Resident - \$5,446, and NAU Flagstaff Non-Resident - \$16,544.

Table 2 displays FY 2008 and FY 2009 appropriations by fund for the Arizona University System. The FY 2009 budget includes \$481.4 million in tuition, which reflects tuition growth from new students, but not tuition rate increases. The higher tuition rates generated \$56.7 million more than budgeted, for a total of \$538.1 million.

Table 2 Arizona University System FY 2008 and FY 2009 Appropriations (in millions)			
	<u>FY 2008</u>	<u>FY 2009 Before Tuition Increase</u>	<u>FY 2009 After Tuition Increase</u>
General Fund	\$1,121.1	\$1,080.4	\$1,080.4
Collections Fund	468.4	481.4	538.1
Total	\$1,589.5	\$1,561.8	\$1,618.5

Table 3 presents FY 2009 appropriations estimates of ABOR’s FY 2009 All Funds Operating Budget Report and resulting additional tuition revenues by campus. Of the \$56.7 million in additional tuition, ASU received \$29.0 million, U of A \$26.8 million, and NAU \$900,000. The \$900,000 additional tuition amount for NAU is substantially lower than expected, given the tuition rate increases shown for NAU in Table 1. Subsequent to the October 2nd meeting memo being published, NAU provided JLBC Staff with additional information regarding their tuition collections. NAU indicates that each university has the discretion to determine the amount it chooses to appropriate, which could explain why its appropriated amount is different.

(Continued)

Table 3 Arizona University System FY 2009 Appropriations and Additional Tuition Revenues by Campus			
<u>Campus</u>	<u>FY 2009 Appropriation</u>	<u>FY 2009 All Funds Operating Budget</u>	<u>Additional Tuition</u>
ASU-Main	\$236,073,700	\$260,679,000	\$24,605,300
ASU-East	25,151,200	27,120,200	1,969,000
ASU-West	25,092,500	27,573,200	2,480,700
NAU	51,739,600	52,620,500	880,900
UofA-Main	129,244,900	153,532,100	24,287,200
UofA-Health Sciences Center	14,063,000	16,543,500	2,480,500
Total	\$481,364,900	\$538,068,500	\$56,703,600

Table 4 provides some information on the uses of additional appropriated tuition revenues by university. Attached, ABOR has provided further detail.

Table 4 Arizona University System Use of Additional Appropriated Tuition Revenues by Campus		
		<u>\$ in Millions</u>
ASU	Faculty Salary Progression and Promotion	\$ 1.1
	Faculty and Staff Salary Compression and Retention	1.0
	Enrollment Growth Allocations and Investments	8.3
	College/School Support from Special Program Fees	2.0
	Faculty and Staff Hiring to improve Student Retention	2.0
	Student Retention Tracking Systems Enhancements	0.1
	University Technology Enhancements	1.3
	Marketing and Communication Student Support	0.9
	Transfer Student Admissions Support	0.6
	Base Utilities Rate/Usage Increases	1.9
	Employee Related Expenses Rate and Premium Increase	3.1
	New Downtown Phoenix Campus Facilities Operations and Maintenance	1.5
	Operations and Maintenance of New Polytechnic Facilities	1.3
	University Technology Office Support from Incremental Fee	3.2
	Environmental Health and Safety	0.5
	Public Safety	0.2
	Total	\$29.1
NAU	Employee Related Expenses	\$ 0.9
UofA	Additional Outreach Programs	\$ 4.4
	Hiring, Retention, and Faculty Commitments	3.9
	General Education Support	3.9
	Support to Colleges from Differential Tuition Revenue	1.2
	22:1 Enrollment Growth Adjustments	0.6
	College of Medicine Phoenix Campus	0.7
	College of Medicine Tucson Campus	0.3
	Law College Faculty Commitment	0.2
	Honors College Instructional Support	0.2
	Telescope Directorate	0.7
	Campus Diversity Initiative and Advising	1.3
	Health Benefit Rate Increases	2.3
	Utility Rate Increases	2.2
	Operation and Maintenance	1.8
	Vice President Health Affairs	1.0
	Enterprise System Replacement Project	1.0
	Banking Services	0.7
	Office of External Relations	0.3
	Total	\$26.7

(Continued)

Locally Retained Tuition and Fees Report

Systemwide, locally retained tuition and fees total \$391.4 million in FY 2009, which is an increase of \$32.0 million above FY 2008 budgeted amounts. *Table 5* shows that \$26.7 million of the increase is allocated to financial aid; \$4.0 million is allocated to the debt service payments, and \$2.0 million is allocated to Plant Fund expenditures. Funding was reduced for Designated Funds by \$(0.5) million and \$(0.2) million for Auxiliary Funds. Auxiliary Funds consist of monies collected from sales and services from substantially self-supporting activities such as residence halls; whereas Designated Funds consist of tuition and fees retained by the universities, summer session fees, administrative costs of student aid, and unrestricted gifts.

Table 5			
Arizona University System			
Locally Retained Tuition and Fees			
	<u>FY 2008</u>	<u>FY 2009</u>	<u>FY 2009 Change</u>
Designated			
ASU-Main	\$11,604,300	\$12,959,700	\$1,355,400
ASU- East	1,382,900	1,394,700	11,800
ASU-West	189,000	189,000	-
NAU	3,286,900	4,963,500	1,676,600
UofA	<u>17,972,500</u>	<u>14,385,300</u>	<u>(3,587,200)</u>
Designated Subtotal	\$34,435,600	\$33,892,200	\$ (543,400)
Auxiliary			
ASU-Main	\$ 2,516,300	\$ 2,516,300	-
ASU- East	-	-	-
ASU-West	-	-	-
NAU	2,194,900	2,248,900	\$ 54,000
UofA	<u>7,129,000</u>	<u>6,909,600</u>	<u>(219,400)</u>
Auxiliary Subtotal	\$11,840,200	\$11,674,800	\$(165,400)
Financial Aid			
ASU-Main	\$ 98,250,700	\$102,699,600	\$ 4,448,900
ASU- East	4,443,100	6,371,500	1,928,400
ASU-West	8,430,500	14,704,300	6,273,800
NAU	28,934,900	30,711,800	1,776,900
UofA	<u>84,550,900</u>	<u>96,851,200</u>	<u>12,300,300</u>
Financial Aid Subtotal	\$224,610,100	\$251,338,400	\$26,728,300
Debt Service	\$73,968,000	\$ 77,989,400	\$ 4,021,400
Plant Fund	<u>14,459,800</u>	<u>16,459,800</u>	<u>2,000,000</u>
Total	\$359,313,700	\$391,354,600	\$32,040,900

RS/LK:ss



Arizona Board of Regents
2020 North Central Avenue, Suite 230
Phoenix, AZ 85004-4593
602-229-2500
Fax 602-229-2555
www.azregents.edu

Arizona State University

Northern Arizona University

University of Arizona

August 28, 2008

The Honorable Bob Burns, Chairman
Joint Legislative Budget Committee
Arizona State Senate
1700 West Washington
Phoenix, Arizona 85007



Dear Senator Burns:

A footnote included in the General Appropriations Act requires that the Arizona Board of Regents submit an expenditure plan to the Joint Legislative Budget Committee of any tuition revenue amounts which are different from the amounts appropriated by the legislature, and all tuition and fee revenues retained locally by the universities.

Enclosed for your information is a summary report of tuition revenues that support the FY 2009 state operating budget as reported to the Board at its August 2008 meeting, and university tuition and fees expenditure plans. The increase in tuition and fees revenues can be attributed to a combination of increased student enrollments from the estimates made last fall during the budget process, and tuition and fee rate increases approved by the Board of Regents.

If you have any questions, please do not hesitate to call me at 229-2505.

Sincerely,

Joel Sideman
Executive Director

xc: ✓ Richard Stavneak, Director, JLBC
James Apperson, Director, OSPB

Board Members: **President Fred T. Boice**, Tucson **Robert B. Bulla**, Scottsdale **Ernest Calderón**, Phoenix
Dennis DeConcini, Tucson **Fred P. DuVal**, Phoenix **LuAnn H. Leonard**, Polacca
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Governor Janet Napolitano **Superintendent of Public Instruction Tom Horne**
Student Regents: **David Martinez III**, UA **Ross Meyer**, ASU
Executive Director: **Joel Sideman**

**ARIZONA UNIVERSITY SYSTEM
TUITION AND FEES IN SUPPORT OF THE
2008-09 STATE OPERATING BUDGET**

	STATE COLLECTIONS		
	AS REPORTED IN THE 2008-09 INITIAL ALL FUNDS OPERATING BUDGET REPORT	2008-09 APPROPRIATIONS REPORT	CHANGE
Arizona State University Tempe	260,679,000	236,073,700	24,605,300
Arizona State University Polytechnic	27,120,200	25,151,200	1,969,000
Arizona State University West	27,573,200	25,092,500	2,480,700
TOTAL ASU	315,372,400	286,317,400	29,055,000
Northern Arizona University	52,620,500	51,739,600	880,900
University of Arizona	153,532,100	129,244,900	24,287,200
University of Arizona Health Sciences Center	16,543,500	14,063,000	2,480,500
TOTAL UA	170,075,600	143,307,900	26,767,700
TOTAL	538,068,500	481,364,900	56,703,600

ARIZONA STATE UNIVERSITY
FY09 PLANNED USES OF ESTIMATED STATE COLLECTIONS AND LOCALLY RETAINED TUITION AND FEE REVENUES
INITIAL ALL FUNDS BUDGET vs. APPROPRIATIONS REPORT

	STATE COLLECTIONS	LOCAL COLLECTIONS
As Reported in the Initial All Funds Report	315,372,400	190,934,100
As Reported in the FY09 Appropriations Report	286,317,400	
Amount Reportable	29,055,000	190,934,100

ALLOCATIONS BY PROGRAM

Instruction		
Faculty Salary Progression and Promotion	1,063,200	
Faculty and Staff Salary Compression and Retention	1,000,000	
Enrollment Growth Allocations and Investments	8,306,300	
College/School Support from Special Program Fees	1,960,300	
Faculty and Staff Hiring to Improve Student Retention	1,965,000	
Local Account Operating Support		9,940,400
Organized Research		
Public Service		
Academic Support		
Advising Services	62,700	
Student Retention Tracking System Enhancements	143,700	
University Technology Enhancements	1,286,400	
Local Operating Budget Support		683,500
Student Services		
Marketing and Communication Student Support	944,900	
Transfer Student Admissions Support	557,200	
Local Account Operating Support		3,405,700
Institutional Support		
Base Utilities Rate/Usage Increases	1,921,800	
Unfunded ERE Rate and Premium Increases	3,114,500	
New Downtown Phoenix Campus Facilities O&M	1,494,800	
Operations and Maintenance of New Poly Facilities	1,338,100	
Univ Technology Office Support from Incremental Fee	3,188,100	
Investment in Environmental Health and Safety	493,000	
Investment in Public Safety	215,000	
Local Account Operating Support		513,800
Scholarships/Fellowships/Financial Aid		
ABOR Financial Aid Set Aside		42,694,300
ABOR Top 15% High School Graduates		8,873,800
All Other Financial Aid		72,207,300
Auxiliary Enterprises		
Auxiliary Operating Support		2,516,300
Debt Service		
Debt Service Payments		37,141,300
Plant Funds		
Minor Capital Project Set Aside		12,957,700
	29,055,000	190,934,100

NORTHERN ARIZONA UNIVERSITY
 FY09 PLANNED USES OF ESTIMATED STATE COLLECTIONS AND LOCALLY RETAINED TUITION AND FEE REVENUES
 INITIAL ALL FUNDS BUDGET vs. APPROPRIATIONS REPORT

	STATE COLLECTIONS	TOTAL LOCAL RETAINED COLLECTIONS
As Reported in the FY09 Initial All Funds Report	52,620,500	55,078,100
As Reported in the FY09 Appropriations Report	51,739,600	
Amount Reportable	880,900	55,078,100

ALLOCATION BY PROGRAM

Instruction		
State Appropriation Offset: Employee Related Expenses	880,900	
Local Account Operating Support		2,885,800
Organized Research		
Research Development		-
Public Service		
Public Service Support		10,900
Academic Support		
Academic Support		-
Student Services		
Student Services Support		603,100
Institutional Support		
Institutional Support		1,450,500
Scholarships/Fellowships/Financial Aid		
ABOR Financial Aid Set Aside		10,300,000
Set-Aside for Acad Meritorious AZ Residents		15,000
All Other Financial Aid		20,396,800
Auxiliary Enterprises		
Student Auxiliary Operating Support		2,262,100
Debt Service		
Debt Service Payments		15,775,700
Plant Funds		
Capital Project Support		1,378,200
	880,900	55,078,100

UNIVERSITY OF ARIZONA
FY09 PLANNED USES OF ESTIMATED STATE COLLECTIONS
INITIAL ALL FUNDS BUDGET vs. APPROPRIATIONS REPORT

	STATE COLLECTIONS	LOCAL COLLECTIONS
As Reported in the Initial All Funds Report	170,075,600	145,342,400
As Reported in the FY09 Appropriations Report	143,307,900	
Amount Reportable	26,767,700	145,342,400

ALLOCATION BY PROGRAM

Instruction		
Additional Outreach Programs	4,421,500	
Hiring, Retention and Faculty Commitments	3,900,000	
General Education Support	3,935,000	
Support to Colleges from Differential Tuition Revenue	1,154,300	
22:1 Enrollment Growth Adjustments Offset from State	609,500	
College of Medicine Phoenix Marginal Tuition	700,300	
College of Medicine Tucson Marginal Tuition	338,100	
Law College Faculty Commitment	210,000	
Honors College Instructional Support	201,000	
Local Account Operating Support		2,165,700
Organized Research		
Telescope Directorate	650,000	
Public Service		
n/a		
Academic Support		
Campus Diversity Initiative & Advising	1,307,000	
Local Account Operating Support		524,500
Student Services		
Local Account Operating Support		8,716,100
Institutional Support		
Shortfall in State Funding for Health Benefit Rate Increases	2,300,000	
Shortfall in State Funding for Utility Rate Increases	2,200,000	
Shortfall in State Funding for Operation and Maintenance	1,800,000	
Vice President Health Affairs	1,000,000	
Enterprise System Replacement Project	1,000,000	
Banking Services	700,000	
Office of External Relations	315,000	
Emergency Texting	26,000	
Local Account Operating Support		3,876,000
Scholarships/Fellowships/Financial Aid		
ABOR Financial Aid Set Aside		17,941,500
Student Aid Awards (formerly waivers)		72,460,400
Graduate Assistant Tuition Remission		6,392,600
All Other Financial Aid		6,069,300
Auxiliary Enterprises		
Auxiliary Operating Support		0
Debt Service		
Debt Service Payments		25,072,400
Plant Funds		
Minor Capital Project Set Aside		2,123,900
	26,767,700	145,342,400

2008-09
LOCALLY RETAINED COLLECTIONS

ARIZONA STATE UNIVERSITY - TEMPE CAMPUS

		FINAL 2007-08	INCREASE/ (DECREASE)	INITIAL BUDGET 2008-09
D E S I G N A T E D		0		
	American English and Cultural Program - ITA	105,500		105,500
	Associated Students - ASASU	1,035,600		1,035,600
	Child & Family Services	75,600		75,600
	Constituent Advocacy	150,000		150,000
	Distance Learning Technology	372,500	311,000	683,500
	Federal Direct Loan Administration	173,600		173,600
	Fine Arts Activities	307,900		307,900
	Fine Arts Theatres	605,900		605,900
	Forensics	106,100		106,100
	Graduate Support Program	0	55,000	55,000
	Interpreters Theatre	35,700		35,700
	KASR Radio	22,000		22,000
	Mona Plummer Aquatic Center	141,900		141,900
	Special Events	176,800		176,800
	Student Affairs Initiatives	275,800		275,800
	Student Financial Assistance Administration	423,000		423,000
	Summer Bridge Program	0	335,200	335,200
	Teaching Assistant Tuition Benefit	7,270,200	654,200	7,924,400
	University Minority Culture Program	126,200		126,200
	Employee Benefit Adjustments/Contingencies	200,000		200,000
A U X I L I A R Y	Subtotal Designated	11,604,300	1,355,400	12,959,700
	ASU Public Events	0		0
	Intercollegiate Athletics	560,000		560,000
	Memorial Union	1,129,200		1,129,200
	Recreational Sports	827,100		827,100
	Student Media	0		0
	Subtotal Auxiliary	2,516,300	0	2,516,300
	Total Operating Funds	14,120,600	1,355,400	15,476,000
F I N A I D	Regents Financial Aid Set-Aside	28,134,900	4,799,500	32,934,400
	Other Financial Aid - Top 15% AZ HS Grad	8,134,200		8,134,200
	Other F.A. - Institutional FA (formerly tuition waivers)	57,245,300	(1,277,700)	55,967,600
	Other Financial Aid - CRESMET/CONACY/NEEP	371,400		371,400
	Other F.A. - Graduate Scholars Program	600,000		600,000
	Graduate Fellowship Program	1,800,000		1,800,000
	Student Technology Fee FA Set-Aside	501,500	562,600	1,064,100
	Other F.A. - School of Engineering Program	60,000		60,000
	College of Design FA Set-Aside	45,400	152,900	198,300
	College of Business FA Set-Aside	383,700	(7,900)	375,800
	Walter Cronkite School of Journalism FA Set-Aside	0	9,500	9,500
	School of Engineering FA Set-Aside	239,700	44,500	284,200
	College of Law FA Set-Aside	663,700	32,500	696,200
	College of Liberal Arts FA Set-Aside	40,400	46,700	87,100
	College of Nursing FA Set-Aside	30,500	86,300	116,800
	Subtotal Financial Aid	98,250,700	4,448,900	102,699,600
	Plant Fund - Minor Capital Projects/Start-Up Funds	10,857,700	2,000,000	12,857,700
	Debt Service	30,235,500	2,021,400	32,256,900
	TOTAL LOCAL RETENTION	152,426,000	9,825,700	163,290,200

2008-09
LOCALLY RETAINED COLLECTIONS

ARIZONA STATE UNIVERSITY - POLYTECHNIC CAMPUS

		MID YEAR UPDATE 2007-08	INCREASE/ (DECREASE)	INITIAL BUDGET 2008-09
D E S I G N A T E D	Career Services	48,900		48,900
	Dining Services Management	38,000		38,000
	Inter-campus Shuttle Services	36,000		36,000
	Learning Communities	6,500		6,500
	Student Counseling	5,000		5,000
	Student Health Services	225,000		225,000
	Student Organizations	21,000		21,000
	Student Orientation and Forums	10,600		10,600
	Student Recreation/Intramurals	301,500		301,500
	Student Union/Activities	558,700		558,700
	Teaching Assistant Tuition Benefit	131,700	11,800	143,500
		0		
	Subtotal Designated	1,382,900	11,800	1,394,700
A U X I L I A R Y				
	Subtotal Auxiliary	0	0	0
	Total Operating Funds	1,382,900	11,800	1,394,700
F I N A I D	Regents Financial Aid Set-Aside	2,652,100	1,450,800	4,102,900
	Morrison School of Mgt & Agribusiness FA Set-Aside	34,600	(34,600)	0
	Other Financial Aid - Top 15% AZ HS Grad	196,200		196,200
	Other F.A.- Institutional FA (formerly tuition waivers)	1,560,200	512,200	2,072,400
	Subtotal Financial Aid	4,443,100	1,928,400	6,371,500
	Plant Fund			
	Debt Service			
	TOTAL LOCAL RETENTION	5,826,000	1,940,200	7,766,200

2008-09
LOCALLY RETAINED COLLECTIONS

ARIZONA STATE UNIVERSITY - WEST CAMPUS

		MID YEAR UPDATE 2007-08	INCREASE/ (DECREASE)	INITIAL BUDGET 2008-09
D E S I G N A T E D	Academic Affairs	5,200		5,200
	Alumni Association - Devil's West	0		0
	Arts & Sciences Support	0		0
	ASU West Commencement	15,000		15,000
	ASUW Film Series	0		0
	ASUW Fine Arts Program	60,000		60,000
	Campus Environment Team	4,800		4,800
	Child Development & Visual Perception Lab	16,000		16,000
	Honors College	3,000		3,000
	Life Science Instructional Support	0		0
	Special Events	20,000		20,000
	Student Government	65,000		65,000
	Subtotal Designated	189,000	0	189,000
A U X I L I A R Y				
	Subtotal Auxiliary	0	0	0
	Total Operating Funds	189,000	0	189,000
F I N A I D	Regents Financial Aid Set-Aside	4,314,600	1,342,400	5,657,000
	Other Financial Aid-Top 15% AZ HS Grad	543,400		543,400
	Other F.A.- Institutional FA (formerly tuition waivers)	3,433,200	765,500	4,198,700
	Other FA - Teach for America	0	4,300,000	4,300,000
	School of Global Mgt & Leadership FA Set-Aside	116,800	(111,600)	5,200
	College of Teacher Education & Leadership FA Set-Aside	22,500	(22,500)	0
		0		
	Subtotal Financial Aid	8,430,500	6,273,800	14,704,300
	Plant Fund	100,000		100,000
	Lease Purchase	4,884,400		4,884,400
	TOTAL LOCAL RETENTION	13,603,900	6,273,800	19,877,700

2008-09
LOCALLY RETAINED COLLECTIONS

NORTHERN ARIZONA UNIVERSITY

		FINAL 2006-07	INCREASE/ (DECREASE)	INITIAL BUDGET 2008-09
D E S I G N A T E D	ADA Services	180,000		180,000
	Art Gallery	10,900		10,900
	Child Care	43,900		43,900
	Creative Arts	58,900		58,900
	Employee Benefit Adjustments/Contingencies	100,000		100,000
	Financial Aid Office Operations	337,300		337,300
	Graduate Assistant Tuition Remission	672,400	375,000	1,047,400
	Graduate Operations Support	8,000	(8,000)	0
	Honors Forum	11,200		11,200
	International Studies	260,000		260,000
	Mountain Campus ID	13,200		13,200
	NAU-Yuma	19,900		19,900
	Operations - Credit Card Fees	600,800	300,000	900,800
	Performing Arts Series	39,900		39,900
	Registrar Office	112,400		112,400
	School of Comm Student Radio, Cable & Forensics	30,200		30,200
	Special Events	28,300		28,300
	Stateside Expansion	0	1,000,000	1,000,000
	Student Activities	289,500	(4,400)	285,100
	SUN (Student Union Network)	65,800		65,800
	Tuition Differential/Program Fee - GIS	0		0
	Tuition Differential/Program Fee - MAdm	267,800	20,000	287,800
	Tuition Differential/Program Fee - MBA	29,800	13,000	42,800
	Tuition Differential/Program Fee - MEng	35,700	(16,000)	19,700
	Tuition Differential/Program Fee - MSM	3,000	(3,000)	0
	Tuition Differential/Program Fee - Doctor of Physical Therapy (DPT)	68,000		68,000
A U X I L I A R Y	Subtotal Designated	3,286,900	1,676,600	4,963,500
	Associated Students (ASNAU)	188,300		188,300
	Intercollegiate Athletics *	1,735,000	54,000	1,789,000
	Intramurals/Recreation	63,700		63,700
	Skydome	207,900		207,900
	* Change of fund source, not change in funding level			
	Subtotal Auxiliary	2,194,900	54,000	2,248,900
	Total Operating Funds	5,481,800	1,730,600	7,212,400
F I N A I D	Regents Financial Aid Set-Aside	8,500,500	1,799,500	10,300,000
	Set-Aside for Academically Meritorious AZ Residents	40,000	(25,000)	15,000
	DPT- FA Set-Aside	11,900		11,900
	MAdm - FA Set-Aside	47,300	3,500	50,800
	MBA - FA Set-Aside	5,300	2,200	7,500
	MEng - FA Set-Aside	6,300	(2,800)	3,500
	MSM - FA Set-Aside	500	(500)	0
	Student Financial Aid Match (SSIG, SEOG, etc.)	318,400		318,400
	Other Financial Aid - (formerly tuition waivers)	20,004,700		20,004,700
	Subtotal Financial Aid	28,934,900	1,776,900	30,711,800
	Plant Fund	1,378,200	0	1,378,200
	Debt Service	14,775,700	1,000,000	15,775,700
	TOTAL LOCAL RETENTION	50,570,600	4,507,500	55,078,100

2008-09
LOCALLY RETAINED COLLECTIONS

UNIVERSITY OF ARIZONA

		MID YEAR UPDATE 2007-08	INCREASE/ (DECREASE)	INITIAL BUDGET 2008-09
		0		
	College of Nursing - Accelerated BSN	448,700	229,800	678,500
	Eller Evening MBA	404,000	87,000	491,000
	Multicultural Affairs and Student Success (M.A.S.S.)			
	Admissions Recruiting	352,600	18,600	371,200
	African American Student Affairs	21,200	400	21,600
	Asian Pacific American Student Affairs	16,500		16,500
	Early Outreach	19,800	100	19,900
	Hispanic Student Affairs	8,600		8,600
	Minority Student Recruitment	177,700	3,200	180,900
	Minority Summer Institute for Writing	13,100	100	13,200
	Multicultural Programs	137,500	800	138,300
	Native American Student Affairs	11,400	100	11,500
	Fall Transition/University Learning Center	14,000		14,000
	FM Student Recreation O&M	251,300	1,500	252,800
	Graduate Teaching Assistants - Tuition Remission	6,388,300	4,300	6,392,600
	Graduate College	174,400	5,400	179,800
	Graduate and Professional Student Council	63,000	200	63,200
	Interpreting/Disabilities (ADA)	152,300	11,900	164,200
	Law College Special Fee	1,100,900	(175,900)	925,000
	Learning Disabilities Mandated Services	364,100	(44,100)	320,000
	Library Acquisitions	461,200		461,200
	Merchant Credit Card Banking Fees	2,233,200	(500,000)	1,733,200
	Special Education Fee Waiver	564,500		564,500
	Student Child Care Voucher Program	87,500		87,500
	Student Travel Support	60,100	(1,800)	58,300
	Student Services	48,300	36,000	84,300
	Utility Costs Reserve	4,398,300	(3,264,800)	1,133,500
	Subtotal Designated	17,972,500	(3,587,200)	14,385,300
	Associated Students (ASUA)	330,900	(10,800)	320,100
	Campus Health Service	4,222,700	72,900	4,295,600
	Campus Recreation and Intramurals	568,100	2,000	570,100
	Student Faculty Relations	6,700		6,700
	Student-Related Activities	47,500	(4,100)	43,400
	Student Programs	685,500	(302,400)	383,100
	Student Union	1,267,600	23,000	1,290,600
	Subtotal Auxiliary	7,129,000	(219,400)	6,909,600
	Total Operating Funds	25,101,500	(3,806,600)	21,294,900
	Regents Financial Aid Set-Aside	14,901,100	2,758,600	17,659,700
	UAS (SV) - Regents FA Set-Aside	261,500	20,300	281,800
	Supplemental Need-Based Set-Aside	1,083,000	(1,083,000)	0
	Other Financial Aid - (formerly tuition waivers)	62,343,000	10,117,400	72,460,400
	Architecture (Grad) FA Set-Aside	3,400		3,400
	Architecture (UG) FA Set-Aside	10,000		10,000
	Eller MBA FA Set-Aside	299,900	60,000	359,900
	Eller (UG) FA Set-Aside	142,600	52,500	195,100
	Engineering (UG) FA Set-Aside	81,000	(11,300)	69,700
	Graduate Scholarships	380,000		380,000
	Journalism FA Set-Aside		8,600	8,600
	Law School FA Set-Aside	581,800	82,100	663,900
	COM FA Set-Aside	255,500	59,700	315,200
	COM - Phoenix - FA Set-Aside	58,000	123,600	181,600
	Optical Science FA Set-Aside		10,200	10,200
	Pharmacy FA Set-Aside	343,300	86,200	429,500
	Planning FA Set-Aside	9,200	600	9,800
	Public Health FA Set-Aside	17,500	(5,400)	12,100
	Undergraduate Scholars	3,619,300		3,619,300
	Nursing Special Fee FA	53,400	6,600	60,000
	SIRLS Special Fee FA	107,400	13,600	121,000
	Subtotal Financial Aid	84,550,900	12,300,300	96,851,200
	Plant Fund	0	0	0
	Utility Infrastructure	2,123,900		2,123,900
	Subtotal Plant Funds	2,123,900	0	2,123,900
	Debt Service	24,072,400	1,000,000	25,072,400
	TOTAL LOCAL RETENTION	135,848,700	9,493,700	145,342,400

STATE OF ARIZONA

Joint Legislative Budget Committee

STATE
SENATE

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DATE: November 6, 2008

TO: Senator Bob Burns, Chairman
Members, Joint Legislative Budget Committee

THRU: Richard Stavneak, Director

FROM: Caitlin Acker, Assistant Fiscal Analyst

SUBJECT: State Compensation Fund - Consider Approval of Calendar Year 2009 and 2010 Budgets

Request

The State Compensation Fund (SCF) has submitted its budgets for Calendar Year (CY) 2009 and CY 2010. Unlike state agencies, SCF is budgeted on a calendar year basis rather than a fiscal year basis.

Pursuant to A.R.S. § 23-981E, SCF is required to submit its operating and capital outlay budget to the Committee for review and approval. Due to a court ruling that SCF assets are not "public funds," the SCF does not believe the Committee's action limits its budget. As a result, for CY 2005 and CY 2006 the Committee took no action on the SCF request. The Committee, however, did approve the CY 2007 and CY 2008 budgets at its December 18, 2006 meeting.

As detailed in page 1 of *Attachment 1*, the SCF budget for CY 2009 is \$142,100,000 and \$146,400,000 for CY 2010.

The amounts do not include any dividend or claims paid by SCF. No Capital Outlay budget was submitted.

Recommendation

The Committee has at least the following 2 options:

1. Approve the submitted budgets. The Committee approved the CY 2007 and CY 2008 budgets in December 2006.
2. Take no action. SCF does not believe that the Committee's action limits their budget.

(Continued)

Analysis

Budget

The SCF operating budget of \$142,100,000 and 580 employees in CY 2009 represents an \$(800,000), or (0.6)% decrease below CY 2008. The CY 2010 operating budget of \$146,400,000 and 580 employees represents a \$4.3 million, or 3% increase above CY 2009 (see page 1 of *Attachment 1*).

The budget categories with the largest change in expenditures from CY 2008 to CY 2009 are the following:

- Premium Taxes - These are statutory assessments made by the Industrial Commission of Arizona against premiums of all workers' compensation insurance carriers. Premium taxes will decrease by \$1.8 million, or 6.4% below CY 2008.
- Employee Expenses - These include salaries, overtime, insurance and other employee benefits. Employee expenses will increase by \$1 million, or 2.2% above CY 2008. SCF did not provide detail on allocation of the \$1 million between salaries or benefits.

The budget categories with the largest change in expenditures from CY 2009 to CY 2010 are the following:

- Premium Taxes - These will increase by \$1.3 million, or 5.1% above CY 2009.
- Employee Expenses - These will increase by \$1.4 million, or 3% above CY 2009.
- Claims Adjustments - These are actuarial reserves for expected costs to administer workers' compensation claims to closure. Claims adjustments will increase by \$300,000, or 3% above CY 2009.

Table 1 shows the historical changes in premium and investment income, and the number of policyholders and claims.

STATE COMPENSATION FUND				
Growth in Premium Income, Investment Income, Policyholders and Claims Processed				
	Actual 2007	Estimated 2008	Estimated 2009	Estimated 2010
Premium Income (in Millions)	\$490.8	\$459.6	\$430.0	\$452.0
Dollar Increase	95.9	(31.2)	(29.6)	23.0
Percentage Increase	24.3%	(6.4)%	(6.4)%	5.1%
Investment Income (in Millions)	\$158.1	\$147.1	\$151.5	\$159.3
Dollar Increase	17.5	(11.0)	4.4	7.8
Percentage Increase	12.4%	(7.0)%	3.0%	5.1%
Policyholders	55,731	50,000	50,000	51,000
Change in Policyholders	(374)	(5,731)	0	1,000
Percentage Increase	(0.7)%	(10.3)%	0%	2.0%
Claims Processed	44,323	38,000	39,000	40,000
Change in Claims Processed	(11,808)	(6,323)	1,000	1,000
Percentage Increase	(21.0)%	(14.3)%	2.6%	2.6%

Page 2 of *Attachment 1* provides detail on the overall SCF balance sheet.

- Total Assets - SCF estimates that total assets will decrease by \$29.8 million, or 0.8% from CY 2007 to CY 2010.
- Total Liabilities - SCF estimates that total liabilities will increase by \$62.1 million, or 2.1%.
- Retained Capital - Retained capital is the sum of profits, after dividend payments, since the fund's inception. It is also called retained earnings, earned surplus, or accumulated earnings. SCF estimates that retained capital will decrease by \$91.9 million, or 14.2% from CY 2007 to CY

(Continued)

2010. SCF estimates a 0.2% increase in retained capital in CY 2009 and a 3.3% increase in CY 2010.

Sufficient levels of retained capital are required to meet the liquidity and safety reserve needs of the fund. Any amount of retained capital above the required level is available for future dividend payments to policyholders. Retained capital is affected by gains and losses from security transaction during the year (realized gains/losses) and by changes in year-end value of the investment portfolio (unrealized gains/losses).

SCF expenditures exceeded the amounts approved by the Committee by \$21.9 million, or 21.0%, in CY 2007 and \$34 million, or 31.2%, in CY 2008.

SCF's willingness to reject the Committee budget is the result of a Maricopa Superior Court ruling of April 13, 2004 that "the monies and assets held by the State Compensation Fund are not public funds." This ruling stemmed from a dispute over whether the Legislature could transfer monies from the SCF to the General Fund. The ruling found that "the proposed transfer from the State Compensation Fund to the General Fund...would violate the Arizona Constitution."

Donations

Attachment 2 includes the donation policy of the SCF as well as a list of donations for 2008 and 2009. SCF has donated a total of \$592,500 to 109 entities for projects or events that are scheduled in 2008. SCF has not donated any money for projects or events scheduled in 2009 yet, but the agency has budgeted \$600,000 for community activities in 2009.

RS/CA:sls



October 3, 2008

The Honorable Senator Robert L. Burns
Chairman, Joint Legislative Budget Committee
Senate Wing Room 110
State Capital
1700 West Washington
Phoenix, Arizona 85007



Dear Senator Burns:

Pursuant to A.R.S. § 23-981(E), SCF Arizona is pleased to provide the Joint Legislative Budget Committee with the attached information concerning its financial results and budgets for the 2009 and 2010 calendar years. In this letter, we would also like to share with you the significant activities and financial performance of SCF since 2007.

SCF Arizona continues to serve our state as the largest provider of workers' compensation insurance in Arizona and is proud to continue to provide the sixth lowest workers' compensation insurance rates in the country to our 53,000 policyholders.

SCF Arizona operates in the highly regulated insurance industry, where its operations are subject to oversight by the Industrial Commission of Arizona and the Arizona Department of Insurance. SCF Arizona is also subject to additional standards set by the National Association of Insurance Commissioners and must report all operational statistics to the National Council on Compensation Insurance. SCF Arizona insures the openness of its activities with annual certified audits of financial statements by McGladrey & Pullen, as required by law, and annual audited financial statements filed with and examined by the Arizona Department of Insurance.

SCF Arizona experienced strong overall financial performance in 2007. Our Board of Directors is pleased to report a 2007 dividend to our state's policyholders of \$50 million based upon annual premium payments of \$492 million and net investment revenue of \$148 million.

With last year's dividend of \$50 million, SCF Arizona has now returned more than 1.2 billion dollars to Arizona's policyholders in the past 37 years. A well run and healthy workers' compensation insurance system provides a strong economic engine to attract new businesses to our state and to provide a healthy and safe working environment for our policyholders and their workers.

With a strong investment portfolio of \$3.5 billion, SCF Arizona has invested more than \$226 million in Arizona and continues to explore ways to improve the business climate and business support in our state. SCF Arizona's employees have also served our state and our communities through an active volunteer program, contributing 4,700 hours of volunteer time and \$150,000 in charitable giving donations.

In 2007, SCF Arizona saved Arizona policyholders more than \$65 million through the use of our Preferred Connection Network of medical providers statewide. At the same time, SCF Arizona vigorously fought workers' compensation fraud, referring 61 investigation reports to the Arizona Department of Insurance Fraud Unit. Thirteen of these were referred specifically to the Arizona Attorney General's Office for prosecution.

Receiving more than 2 million pieces of mail and 300,000 telephone calls annually, SCF Arizona served our policyholders and our state's workers with high quality medical care and claims processing. Loss control expertise and Safety Expos were provided statewide and 73 safety seminars were conducted with the Arizona Department of Occupational Safety and Health.

Finally, SCF Arizona paid more than \$25 million in property and premium taxes in 2007. SCF Arizona receives no state funding or support and operates solely on the revenue provided by investments and policyholder premiums. At SCF Arizona, we believe we have a social responsibility to injured workers and their families, an economic responsibility to Arizona businesses and a corporate leadership responsibility to continue to be a leading part of Arizona's economic growth engine.

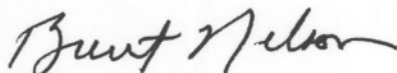
2009-2010 Forecast

Looking ahead SCF Arizona continues to be financially sound and well positioned to meet the demands of Arizona businesses for workers' compensation insurance. However, because of increased competition from the private sector, restrictions on SCF's ability to provide coverage in certain circumstances, and the slowing economy; earned premiums are expected to decline in 2009. Income from investments is expected to grow slowly in 2009 and 2010, assuming economic stabilization that will result in a gradual increase in underlying yields.

Net Income before Policyholder Dividends in 2009 and 2010 reflects our plans to introduce multiple premium rate structures. This platform will enable SCF to better match upfront premium rates with risk exposures reducing the dependence on back end dividends for 2009 and beyond. The bottom line is that SCF continues to operate in the best interests of Arizona policyholders with a strong balance sheet while providing one of the lowest rates for workers' compensation insurance coverage in the United States.

We hope you find this information regarding SCF operations useful. We would be pleased to provide you with additional information upon request. Please feel free to contact me at (602) 631-2068.

Sincerely,



Brent Nelson
Chief Financial Officer

cc: The Honorable Representative Russell K. Pearce, Vice-Chair, JLBC
Richard Stavneak, Director, JLBC
Caitlin Acker, Assistant Fiscal Analyst, JLBC
SCF Arizona Board of Directors



2007 - 2010 JLBC Comparative Statutory Income Statement

(Millions)	Actual 2007	Estimated 2008	Estimated 2009	\$ Change from Prior Year %		Estimated 2010	\$ Change from Prior Year %	
Premiums Earned	490.8	459.6	430.0	(29.6)	-6.4%	452.0	22.0	5.1%
Losses	458.5	484.7	412.0	(72.7)	-15.0%	422.5	10.6	2.6%
Claims Administration Reserve	2.7	5.0	5.0	0.0	0.0%	5.0	0.0	0.0%
Total Incurred Claims	461.1	489.7	417.0	(72.7)	-14.8%	427.5	10.6	2.5%
Gross Margin	29.7	(30.1)	13.0	43.1	143.4%	24.5	11.4	87.5%
Investment and Other Income								
Investment Income	158.1	147.1	151.5	4.4	3.0%	159.3	7.8	5.1%
Net Realized Gains (Losses)	5.6	70.0	6.0	(64.0)	-91.4%	6.0	0.0	0.0%
Self-Rater	(25.0)	(6.7)	(5.0)	1.7	25.8%	(5.0)	0.0	0.0%
Other Income	2.5	1.7	1.6	(0.1)	-5.9%	1.7	0.1	5.1%
Total Investment and Other Income	141.2	212.1	154.1	(58.0)	-27.3%	161.9	7.8	5.1%
Operating Expenses								
Premium Taxes	24.2	27.8	26.0	(1.8)	-6.4%	27.3	1.3	5.1%
Employee Expenses	42.9	46.1	47.1	1.0	2.2%	48.5	1.4	3.0%
Travel/Training	1.6	1.3	1.3	0.0	0.0%	1.4	0.0	3.0%
Association Safety Plan Fees	11.1	12.3	12.3	0.0	0.0%	12.5	0.2	1.6%
Board/Prof Fees/Outside Svcs	11.3	13.3	13.3	0.0	0.0%	13.5	0.2	1.5%
Supplies	11.4	12.1	12.1	0.0	0.0%	12.4	0.4	3.0%
Depreciation	7.7	13.6	13.6	0.0	0.0%	13.8	0.2	1.6%
Maintenance & Occupancy	7.2	6.3	6.3	0.0	0.0%	6.5	0.2	3.0%
Claims Adjustments	9.0	10.2	10.2	0.0	0.0%	10.5	0.3	3.0%
Total Operating Expenses	126.4	142.9	142.1	(0.8)	-0.6%	146.4	4.3	3.0%
Net Income before Policyholder Dividends	44.5	39.1	25.0	(14.1)	-36.0%	40.0	15.0	59.9%
Policyholder Dividends	50.0	25.0	25.0	0.0	0.0%	25.0	0.0	0.0%
Net Income	(5.5)	14.1	0.0	(14.1)	-99.8%	15.0	15.0	-
FTE	531	575	580	5.0	0.9%	580	0.0	0.0%



2007 - 2010 JLBC Comparative Statutory Balance Sheet

(Millions)

	Actual 2007	Estimated 2008	Estimated 2009	\$ Change from Prior Year %		Estimated 2010	\$ Change from Prior Year %	
Total Invested Assets	3,545.0	3,522.7	3,508.7	(14.0)	-0.4%	3,524.0	15.2	0.4%
Total Other Assets	110.1	103.0	96.4	(6.6)	-6.4%	101.3	4.9	5.1%
Total Assets	<u>3,655.1</u>	<u>3,625.7</u>	<u>3,605.2</u>	<u>(20.6)</u>	<u>-0.6%</u>	<u>3,625.3</u>	<u>20.2</u>	<u>0.6%</u>
Loss and Policyholder Liabilities	2,577.3	2,751.0	2,676.1	(74.9)	-2.7%	2,678.5	2.4	0.1%
Other Liabilities	429.1	337.0	390.0	53.0	15.7%	390.0	0.0	0.0%
Total Liabilities	<u>3,006.4</u>	<u>3,088.0</u>	<u>3,066.1</u>	<u>(21.9)</u>	<u>-0.7%</u>	<u>3,068.5</u>	<u>2.4</u>	<u>0.1%</u>
Retained Capital	648.7	537.7	539.1	1.3	0.2%	556.8	17.8	3.3%
Total Liabilities and Policyholder Surplus	<u>3,655.1</u>	<u>3,625.7</u>	<u>3,605.2</u>	<u>(20.6)</u>	<u>-0.6%</u>	<u>3,625.3</u>	<u>20.2</u>	<u>0.6%</u>

2007 - 2010 JLBC Comparative Retained Capital Exhibit

(Millions)

	Actual 2007	Estimated 2008	Estimated 2009	\$ Change from Prior Year %		Estimated 2010	\$ Change from Prior Year %	
Beginning Balance	669.5	648.7	537.7	(111.0)	-17.1%	539.1	1.3	0.2%
Operating Income	38.9	(30.9)	19.0	49.9	161.5%	34.0	15.0	78.8%
Net Realized Capital Gains (Losses)	5.6	70.0	6.0	(64.0)	-91.4%	6.0	0.0	0.0%
Change in Net Unrealized Capital Gains (Losses)	3.2	(116.9)	1.3	118.2	101.1%	2.7	1.4	107.7%
Change in Non-Admitted Assets	(18.5)	(8.2)	0.0	8.2	100.0%	0.0	0.0	0.0%
Dividends	(50.0)	(25.0)	(25.0)	0.0	0.0%	(25.0)	0.0	0.0%
Ending Balance	<u>648.7</u>	<u>537.7</u>	<u>539.1</u>	<u>1.3</u>	<u>0.2%</u>	<u>556.8</u>	<u>17.7</u>	<u>3.3%</u>

State Compensation Fund Donation Policy:

In regards to our community outreach giving, the Board has adopted the following statement:

SCF Arizona is the largest provider of workers' compensation insurance in the state of Arizona. Through a targeted community outreach effort, the Board of Directors of SCF Arizona is committed to supporting organizations dedicated to improving the quality of life and business climate for local residents. In providing such support, SCF is broadening the branding, awareness and knowledge of SCF Arizona while furthering the business interests of the company and the welfare and future value for our policyholders.

The SCF Board of Directors further believes that it is the corporate responsibility of SCF to be actively engaged in the communities we serve through direct sponsorship support and employee involvement. We believe that being a community partner is more than providing the highest quality service to our policyholders; it means taking ownership of the role we can play in making our state a better place to live for everyone.

The SCF Board further believes that, as members of the community, it is the corporate responsibility of SCF to discharge social and business responsibilities to improve the public image of the company. SCF Arizona functions in a proprietary nature and is imbued with the powers of a corporation. In this role, it should advance social, educational, safety and community interests as a responsible corporate citizen. Corporate expectations provide for specific advertising opportunities and general public exposure to generate public and business good will – all of which must be balanced with SCF's community outreach giving goals.

SCF Arizona will focus its community outreach efforts in the following strategic areas with a specific interest in programs that promote workplace safety:

- Education
- Community / Economic Development
- Human Services
- Arts/Culture
- Civic Leadership

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
12/11/07	Statewide	Arizona Workers' Compensation Claims Association -	2007 Holiday Party Donation Drive	\$900
01/08/08	Statewide	Arizona Chamber of Commerce - When: Tuesday, January 8, 2008 - Registration: 11:30 a.m. Program: Noon to 1:30 p.m. -- Where: Phoenix Hyatt Regency - 122 N. 2nd St., Phoenix -- http://www.azchamber.com/	2008 Arizona Legislative Forecast Luncheon - Speakers: Senator Tim Bee, Speaker Jim Weiers, Senator Marsha Arzberger, Representative Phil Lopes	\$25,000
01/16/08	Pima/Tucson	Tucson Metro Chamber of Commerce - When: Wednesday, January 16, 2008 - Registration begins at 11 a.m. - Luncheon/Program begins at Noon - Where: Tucson Convention Center -- http://www.tucsonchamber.org/	State of the State Address Luncheon - The Governor uses this Chamber event to deliver the "State of the State" address detailing the issues affecting not only Southern Arizona, but the entire state. -- Email Shirley Wilka @swilka@tucsonchamber.org with attendee names.	\$3,850
01/17/08	Maricopa	Greater Phoenix Chamber of Commerce - When: 01/17/08, 6 p.m. to 8 p.m. -- Where: Phoenix Art Museum 1625 N. Central Av., Phoenix, 85004 -- http://www.phoenixchamber.com -- We invite you to enjoy hors d'oeuvres, cash bar and special entertainment. VIP RECEPTION: 5:45 - 6:30 p.m (gallery to be announced); Members reception (main gallery): 6-8 p.m. Don will introduce Governor Napolitano.	Reception in celebration of the opening of the Second Regular Session of the 48th Legislature. This event will honor Governor Janet Napolitano, Senate President Tim Bee, and Speaker of the House Jim Weiers, Senate Minority Leader Phil Lopes and House Minority Leader Marsha Arzberger. Invited guests will include legislators and elected representatives of state and city government; department and agency directors; lobbyists, and members of the business community; as well as the board of directors and members of the Greater Phoenix Chamber of Commerce.	\$10,000
01/18/08	Maricopa	Arizona Dr. Martin Luther King, Jr. Celebration Committee - When: Friday, January 18, 2008 - 7 a.m. to 9 a.m. -- Where: Phoenix Convention Center, West Building, Third Floor:D-D Ballroom, 100 North Third Street, Phoenix -- http://phoenix.gov/newsrel/2712mlkbreak.html	MLK, Jr. Celebration Awards Breakfast - Supported by the Phoenix Human Relations Commission and the City of Phoenix	\$1,300

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
01/23/08	Pima/Tucson	Tucson Metro Chamber of Commerce - When: Wednesday, January 23, 2008 - Lunch is served at 11:30 a.m. & Program begins at Noon -- Where: Tucson Convention Center -- http://www.tucsonchamber.org/	Arizona Athletics Spring Kick Off Luncheon - Get ready to cheer on the Arizona Wildcats in softball, baseball, tennis, golf, and track & field at the next Arizona Athletics Spring Kick-Off Luncheon at the Tucson Convention Center. Don't miss your chance to join student-athletes, cheerleaders, the band, Wilbur, and hundreds of Wildcat fans as they hear about the upcoming season from Head Coaches Tad Berkowitz, Mike Candrea, Fred Harvey, Shelly Haywood, Rick LaRose, Andy Lopez, and Vicky Maes.	\$1,500
01/25/08	Maricopa	Phoenix Parks & Preserves Initiative	Contribution Request - W-9 Rv'd 2/4/08	\$5,000
01/26/08	Maricopa/West	Theater Works - When: Saturday, January 26, 2008 - 5 p.m. Reception/Silent Auction, 6:30 p.m. Karen Mason performance - 8 p.m. Dinner & Dancing on Plaza - 10 p.m. Live Auction & Raffle Drawing -- Where: Peoria Center for the Performing Arts, 8355 W. Peoria Av., Peoria -- Valet Parking -- www.theatreworks.org	The Sweetest of Nights: A Cabaret Gala - Featuring Broadway Actress & Cabaret Singer Karen Mason -- Dress: Black Tie Only!	\$2,500
01/26/08	Maricopa	Juvenile Diabetes Research Foundation - When: Saturday, January 26, 2008 - 6 p.m. to 11 p.m. -- Where: The Phoenician, 6000 E. Camelback Rd., Scottsdale. -- http://www.jdrf.org/index.cfm?page_id=102759 - W-9 Rcv'd 2/12/08	The Promise Ball - Black Tie Attire Please - Honoring Ms. Lee Ducat Founding Mother, Juvenile Diabetes Research Foundation International - Entertainment featuring Kenny Loggins *An elegant cocktail party & dinner *A gourmet meal *Live and silent auction items	\$5,000
01/31/07	Flagstaff	Flagstaff Chamber of Commerce - When: Thursday, January 31, 2008, 11:30 a.m. to 1:30 p.m. -- Where: Little America, 2515 E. Butler Av., Flagstaff -- http://www.flagstaffchamber.com/	2008, Annual Luncheon - This year's featured guest speaker will be Robert Sarver, CEO of Alliance Bank of Arizona and owner of the Phoenix Suns.	\$450
02/01/08	Pima/Tucson	Greater Tucson Leadership - When: Friday, February 1, 2008 - Registration @ 11 a.m., Program @ 12 p.m. -- Where: Tucson Convention Center, Grand Ballroom	State of the City - Event is held in conjunction with Tucson Metro CoC	\$5,000
02/04-10/08	Maricopa	Phoenix Chinese Week - When: February 4 to 10, 2008 -- Where: Chinese Cultural Center -- http://www.phoenixchineseweek.com/Home_Page.php Performance: Saturday, February 9th, 2008 Phoenix Chinese Week Presents: Chengdu Art Center Variety Performance Show 6:30 p.m. Orpheum Theater 203 W. Adams St., Phoenix; Featuring acrobatics, dancing, singing, folk instruments, puppets and performances in traditional costumes. Chinese New Year Banquet: Sunday, February 10th, 2008 6 p.m.- No host cocktail reception 7 p.m. - Dinner @ Great Wall Restaurant 3446 W. Camelback Rd., Phoenix	2008 Year of the Rat:	\$2,500

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
02/06/08	Maricopa/West	WESTMARC - When: Wednesday, February 6, 2008 7:30 a.m. - 9:30 a.m. -- Where: Glendale Civic Center, 5750 W. Glenn Drive, Glendale 85301 -- http://www.westmarc.org/	Annual Meeting & Economic Forecast Breakfast - Featuring Renowned Economist Elliott Pollack & Michael Kennedy, Chairman of the AZ Super Bowl Host Committee	\$15,000
02/08/08	Maricopa	Xico, Inc. - When: Friday, February 8, 2008; cocktails 6-7 p.m., dinner at 7 p.m., art auction during dinner. -- Where: Wyndham Hotel, downtown Phoenix -- http://www.xicoinc.com/ -- No Tickets are necessary. Attendees will just need to check in and ask for the SCF Arizona table.	2008 Xico Inc.'s annual Celebrity Waiters Dinner and Art Auction is the main fundraising event for the organization. This event provides Xico Inc. the opportunity to showcase Native American and Latino artists. The live auction features original prints developed during the workshop. Governor Janet Napolitano will serve as the honorary chair. Wear your favorite team jersey or business attire.	\$3,000
02/09/08	Statewide	Human Rights Campaign - When: Saturday, February 9, 2008 @ 5:30 p.m. -- Where: Phoenix Convention Center, 100 N. 3rd St., Phoenix -- http://phoenix.hrc.org/ <i>Black tie optional.</i>	4th Annual Arizona HRC Dinner - "Be The Change" == The Human Rights Campaign is a diverse volunteer group of individuals working each and every day to bring the mission of HRC to gay, lesbian, bisexual, and transgender and straight-supportive people in this area. By taking part in community events, prides, town hall meetings and partnerships with other organizations, these volunteers are working hard to support HRC's efforts in the movement for equal rights for LGBT people.	\$2,500
02/09/08	Statewide	Arizona Lost Boys - When: Saturday, February 9, 2008 - Cocktail Reception & Silent Auction 6:30 p.m. - Dinner, Program & Dancing 8 p.m. -- Where: Hilton Scottsdale Resort & Villas, 6333 N. Scottsdale Rd., Scottsdale, AZ 85250 -- http://www.azlostboyscenter.org/	Journey of Hope Fundraising Event -- The Lost Boys & Girls of Sudan -- Cocktail Attire Please -- Susan W. Jones, Event Chair 480-220-0923 susanwjones@cox.net -- Entertainment by Chuck E Baby & The Allstars. Rick DeGraw and Paula Koroso to receive sponsor plaque on stage at event; no speaking, just to receive the award.	\$10,000
02/14/08	Yuma	Yuma Ammonia Safety Day Committee - When: Thursday, February 14, 2008 -- Where: Civic Center, 1440 Desert Hills Drive, Yuma -- http://www.yaasd.org/	4th Annual Safety Day	\$1,100
02/14/08	Maricopa	Greater Phoenix Chamber of Commerce - When: Thursday, February 14, 2008 - 7:30 a.m. Registration, 8 a.m. to 10 a.m. Program, 10 to 11:30 a.m. Expo -- Where: Marriott Phoenix Airport 1101 N. 44th St. Phoenix, AZ 85008 -- http://www.phoenixchamber.com	Made in Arizona: Breakfast and Expo, A Celebration of Arizona Manufacturing	\$5,000

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
02/23/08	Maricopa/West	Asian Chamber of Commerce - When: Saturday, February 23, 2008 - 6 p.m. No host cocktails, 7 p.m. Dinner -- Where: Glendale Civic Center 5750 West Glenn Drive Glendale, AZ 85301 http://www.asianchamber.org/	Lunar New Year of the Rat	\$2,500
02/26/08	Maricopa	Urbanity Salon - When: Tuesday, February 26, 2008 - 6 to 8:30 p.m. Buffet Dinner Served Promptly at 6:15 p.m. -- Where: Phoenix Country Club, 2901 N. 7th St.	Forum to address issues that are of great import to the future of our community (Greater Phoenix)	N/A
02/29/08	Statewide	Arizona Latino Media Association - When: Friday, February 29, 2008 8 a.m. to 3 p.m. -- Where: ASU Downtown Campus	ALMA Multimedia Workshop for students - W-9 Rcv'd 2/6/08	\$500
02/29/08	Pima/Tucson	Greater Tucson Leadership - When: Friday, February 29, 2008 - 11:30 a.m., Registration - 12 p.m. to 1:30 p.m., Program -- Where: The Manning House, 450 W. Paseo Redondo, Tucson	Congresswoman Giffords presents "Solar Energy & Southern Arizona: Transforming our lives and our world"	\$325
02/29/08	Maricopa	United Phoenix Fire Fighters Association	Save-R-Kids Coloring Books	\$5,000
02/29 & 03/01/08	Maricopa	Phoenix Sister Cities Commission - When: Friday & Saturday, February 29 & March 1, 2008 - 5 p.m. to 10 p.m. on Friday and 10 a.m. to 10 p.m. on Saturday -- Where: Margaret T. Hance Park, 3rd St. & Moreland	World FEST - Celebrate the world we live in is a celebration of culture, the arts and food from our sister cities and more.	\$5,000
03/01/08	Statewide	Ballet Arizona - When: Saturday, March 1, 2008 - 6:30 p.m. Cocktails & Hors d'oeuvres, 7:30 p.m. Ballet Arizona Performance, 8:15 p.m. Dinner, dancing & post-dinner lounge -- Where: Phoenix Art Museum -- http://www.balletaz.org/eoffice/taf/_balletaz.taf?mnid=support&smid=1192029089	Dance with Me Rubies Ball Annual Signature Fundraising Event -- Black Tie	\$5,000
03/06/08	Maricopa	City of Phoenix - When: Thursday, March 6, 2008 - 11:30 a.m. Silent Auction, Luncheon is Noon - 1:30 p.m. -- Where: Phoenix Convention Center, South Ballroom, 3rd & Jefferson Streets-- phoenix.gov/phxwomen/luncheon.html	2008 International Women's Day Luncheon "Women of Courage: Create the Vision" Keynote Speaker: Martha Beck, Best-selling author and life coach	\$1,500
03/09/08	Maricopa	United Phoenix Fire Fighters Association along with Tim & Willy -- When: Sunday March 9, 2008 10 a.m. - 7 p.m. -- Where: Mountain Preserve Reception Center, 1431 E. Dunlap, Phoenix	1st Annual Chili Cook-Off -- Fire Fighters vs Fire Fighters vs Valley Chefs - All proceeds go to fire Fighter Charities	\$1,500
03/13/08	Statewide	Latino Future - When: Thursday, March 13, 2008 - 7 p.m. to 10 p.m. - Where: Phoenix Art Museum	2008 Latino Baseball Award Festival	\$2,000

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
03/15/08	Statewide	Arizona Animal Welfare League & SPCA - When: Saturday, March 15, 2008 @ 6 p.m. Cocktails & hors d'oeuvres & Silent Auction, Dinner @ 7 p.m. -- Where: Hilton Scottsdale Resort & Villas, 6333 N. Scottsdale Rd., Scottsdale -- http://aawf.org/	An Evening to Paws, 2008 -- Questions & Info Sheri Hines 480-423-1511 Sheri@PhoenixConferencePlanners.com == Black Tie Optional	\$2,500
03/18/08	Maricopa	ASU Foundation - When: Tuesday, March 18, 2008 - Reception @ 6 p.m., Dinner & Awards Ceremony @ 7 p.m. -- Where: The Buttes, A Marriott Resort -- http://www.asufoundation.org/	Founders' Day 50th Anniversary of the Campaign for Renaming the University	\$2,500
03/20/08	Maricopa	Valley Leadership - When: Thursday, March 20, 2008 - Noon to 1:30 p.m., Registration begins at 11:15 a.m. -- Where: Arizona Biltmore Resort, Frank Lloyd Wright Ballroom, 24th Street & Missouri, Phoenix	59th Annual Man & Woman of the Year Awards - Honoring Dan Coleman & Dr. Carol Peck - Honors an outstanding man and woman for their long-term contribution and commitment to our community. Honorees include "the most notable and influential leaders in your Valley over the last six decades".	Part of Yearly Contract
03/25/08	Maricopa	Valley Leadership - When: Tuesday, March 25, 2008 - 7:30 a.m. Registration - 8 a.m. to 9:30 a.m. Program -- Where: APS Headquarters, 400 N. 5th St., 2nd Flr., Phoenix -- Light Breakfast provided	Our Future in the Making: Arizona Indicators - Part of Valley Leadership's Community Dialogue Series	\$20,000
03/28/08	Maricopa	Cesar Chavez Foundation - When: Friday, March 28, 2008 - 11:15 a.m. Doors Open, 11:50 a.m. Program Begins -- Where: Phoenix Convention Center, West Building, 3rd Flr., 100 N. 3rd St., Phoenix -- http://www.chavezfoundation.org/	7th Annual Cesar Chavez Luncheon - Educational Roundtable - Platica -- Tickets distributed to attendees 3/28/08.	\$10,000

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
03/28/08	Statewide	Parenting Arizona (Subsidiary of CPLC) - When: Friday, March 28, 2008 - 11:30 a.m. to 1:30 p.m. -- Where: Arizona Biltmore Resort, Gold Room 24th St. & Missouri, Phoenix -- VIP Reception @ 11:15 a.m. with all honorees. Don Smith is invited to attend. -- http://www.parentingaz.org/	Champions for Children Honorees Luncheon - Senator Carolyn S. Allen, Dennis K. Burke, Anne Mariucci & John Junker -- List of attendees sent to PA 3/24/08.	\$5,000
03/29/08	Statewide	Arizona Hispanic Chamber of Commerce - When: Saturday, March 29, 2008 - Reception @ 6 p.m., Dinner & Program 7:30 p.m., Dance 9 p.m. -- Where: Arizona Biltmore Resort, Frank Lloyd Wright Ballroom 2400 E. Missouri, Phoenix - http://www.azhcc.com/	50th Annual Black & White Ball & Business Awards - Black Tie Optional -- Attendee list email to AHCC 03/17/08	\$15,000
03/31/08	Maricopa	United Way, Valley of the Sun - When: Monday, March 31, 2008- Registration 11 a.m. to Noon, Lunch & Program Noon to 1:30 p.m.-- Where: Arizona Biltmore Resort, Frank Lloyd Wright Ballroom, Phoenix -- http://www.vsuw.org/site/PageServer	Annual Campaign Recognition Luncheon - The Winner's Circle Celebrating the Road to Results; United Way donors may attend this event.	\$400
04/00/08	Statewide	Rehabilitation Insurance Nurses Group of Arizona	Monthly Meeting	\$150
04/03/08	Statewide	Recording for the Blind & Dyslexic, Arizona Unit - When: Thursday, April 3, 2008, 6:30-9 p.m. -- Where: McCormick Ranch Golf Club, Outdoor Pavilion, 7505 E. McCormick Ranch Parkway, Scottsdale - Heavy Appetizers -- http://www.rfbd.org/az/	Evening with the Authors, Joe Garagiola, Nancy Turner, Sylvia Nobel, Hershman John -- Business Casual Attire	\$1,000
04/04/08	Maricopa	YMCA-Lincoln family Downtown - When: Friday, April 4, 2008 5:30 p.m. to 7 p.m. Hors d'oeuvres & Cocktails -- Where: Home of Richard & Susan Doria 3003 E. San Miguel Ave., Phoenix	2008 Annual Support Campaign victory celebration w/honorees Don Smith & Paige Heavey; SCF executive guests only.	\$10,000
04/05/08	Maricopa	Asian Pacific Community in Action - When: Saturday, April 5, 2008 6-7 p.m. reception, dinner and program 7 to 9 p.m. -- Where: Banquet Hall of the East Valley Institute of Technology in Mesa, 1601 W Main Street. -- http://www.apca-az.org/Home.html	A Taste of Asia Fundraising Event - Event honorees will include Don Smith, Dennis Burke & Dr. Pearl Tang - Gourmet dinner planned by local chef Mr. Kevin Chiang and a lively cooking competition to be hosted by Chef Bill Sy. The evening will include a reception offering delicious and distinctive appetizers from the various regions of Asia and the Pacific Islands.	\$5,000

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
04/05/08	Statewide	Beads of Courage - When: Saturday, April 5, 2008 from 4 p.m. to 7 p.m. -- Where: The Borgata Scottsdale (Scottsdale Road and Lincoln)	Bead Inspired Event - During the event, individuals will create their own beaded bracelet, enjoy a little food/drink and help support Beads of Courage Programs, which help children coping with serious illness.	\$500
04/05/08	Maricopa	All-Star Kids Tutoring - When: Saturday, April 5, 2008 - 6:30 p.m. to 9 p.m. -- Where: Calvin Charles Gallery of Contemporary Asian Art, 4201 N. Marshall Way, Scottsdale 85251	The Art of Literacy - Wine, heavy hors d'oeuvres, entertainment, fine art and opportunities to bid on silent auction items.	\$1,000
04/08/08	Statewide	Arizona Red Cross Grand Canyon Chapter - When: Tuesday, April 8, 2008 - 7:30 a.m. Coffee Reception, 8 a.m. Breakfast & Program -- Where: Arizona Club, 37th Floor, 201 N. Central Av., Phoenix, AZ 85004 -- http://www.arizonaredcross.org/	Community Leaders Breakfast Fundraiser, Guest Speaker Governor Janet Napolitano	\$10,000
04/09/08	Statewide	The United Food & Commerical Workers Union - When: Wednesday, April 9, 2008 - 11 a.m. Registration/Lunch - 12:30 p.m. Shotgun Start , Reception, dinner and awards ceremony following 18 holes of golf; Four person scramble - - Where: Raven Golf Club, 3636 E. Baseline Rd., Phoenix -- http://www.ulfw99.com/	UFCW Local 99 Charity Golf Classic	\$2,500
04/10/08	Maricopa	Phoenix Global Trade Initiatives Business Journal & the Greater Phoenix Economic Council - When: Thursday, April 10, 2008 - 7:30 a.m. Registration, 8 a.m. Breakfast -- Where: Phoenix Convention Center, West Wing, Room 301A -- http://phoenix.bizjournals.com/phoenix/	Mayor Gordon's Global Trade Initiative & the opportunities for economic development. -- Phoenix Global Trade Initiatives	\$2,500
04/11/08	Pima/Tucson	Tucson Metro Chamber of Commerce: When: Friday, April 11, 2008 - Registration at 11:30 a.m., Program begins as Noon -- Where: Hilton Tucson El Conquistador located at 10000 N. Oracle Road, Tucson -- http://www.tucsonchamber.org/	State of the District Luncheon - U.S. Rep. Gabrielle Giffords will use this Chamber event to update residents on the progress made at the Capitol.	\$5,400
04/11/08	Pima/Tucson	Junior Achievement of Arizona - When: Friday, April 11, 2008 -- Where: Omni Tucson National Resort & Spa	Junior Achievement Open	\$2,000
04/16/08	Maricopa	Greater Phoenix Chamber of Commerce - When: 04/16/08, 11 a.m. -- Where: Phoenix Convention Center -- http://www.phoenixchamber.com	Mayor's State-of-the-City Address & Luncheon	\$10,000

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
04/17/08	Maricopa	Maricopa Community Colleges' Foundation - When: Thursday, April 17, 2008, 6 p.m. -- Where: Arizona Biltmore Resort, Frank Lloyd Wright Ballroom, 2400 E. Missouri Av., Phoenix -- http://www.maricopa.edu/resdev/foundation/index.php	Heroes of Education 2008 Recognition Dinner - Honoring Richard L. Boals of BCBSAZ	\$10,000
04/18/08	Statewide	Valle Del Sol - When: Friday, April 18, 2008, 7:30 a.m. Registration - 8 a.m. to 9 a.m. Program & Breakfast - Where: Phoenix Convention Center West Ballroom, 3rd Floor, 100 N. 3rd St., Downtown Phoenix	The APS Center for Culture & Understanding Award Presentation & Breakfast - APS Peacemaker Award Honoree Juanita F. Francis, Community Volunteer	\$2,500
04/18/08	Maricopa	A Stepping Stone Foundation - When: Friday, April 18, 2008: 6 p.m. to 11 p.m. -- Where: El Zaribah Shrine in Central Phoenix, 552 N. 40th Street -- www.astepplingstone.org	The evening will include dancing, a silent auction and activities unique to Cena y Serenata such as serenades, potentate chorus and live orchestra.	\$5,000
04/18/08	Pima/Tucson	Greater Tucson Leadership - When: Friday, April 18, 2008. Registration will begin at 11a.m. with the luncheon and program beginning at noon. -- Where: Tucson Convention Center -- http://www.tucsonleadership.org/	2008 State of the County Luncheon	\$1,000
04/19/08	Maricopa	Phoenix Indian Center Gala & Native American Art Auction - When: Saturday, April 19, 2008 - 5:30 p.m. Cocktail Hour & Silent Auction - 7 p.m. Dinner & Entertainment -- Where: Phoenix Convention Center, 100 N. 3rd St., Phoenix -- http://www.phxindcenter.org/	Historic Celebration, Phoenix Indian Center Celebrates 60 Years - Exclusive engagement 'Firecat of Discord' featuring Actor Wes Studi on Bass & Vocals - Honorary Co-Chairs Mayor Phil Gordon City of Phoenix & Chairwoman Della Carlyle Ak-Chin Indian Community -- Attire: Native Dress or Cocktail Attire	\$5,000
04/19/08	Maricopa/West	New Life Center - When: Saturday, April 19, 2008 - Check-in begins: 6:30 a.m. (Range Balls will be provided), Shotgun Start: 8 a.m. Awards & Luncheon will follow play. Traveling trophy will be awarded to first place winners -- Where: Palm Valley Golf Course, 2211 N. Litchfield Rd., Goodyear, 85338 (Corner of Palm Valley & Litchfield Rd)	3rd Annual Rudolfo Bros. Charity Golf Classic	\$750
04/22/08	Maricopa	ASU Technopolis - When: Tuesday, April 22, 2008 - 7:30 a.m. Shotgun -- Where: ASU Karsten Golf Course, Tempe -- http://www.asutechnopolis.org/	Annual Golf Tournament	\$1,000

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
04/22/08	Maricopa	Greater Phoenix Chamber of Commerce - When: Tuesday, April 22, 2008 - Registration, 11:30 a.m. Lunch, Noon - Where: Arizona Biltmore Resort -- http://www.phoenixchamber.com/	Phoenix Forum - Tommy Lasorda of the L.A. Dodgers	\$1,800
04/23/08	Statewide	Arizona Small Business Association - When: Wednesday, April 23, 2008 - 8:30 a.m. to 10:30 a.m. Breakfast - Where: Phoenix Convention Center, Hall G - 111 N. 3rd St., Phoenix -- http://www.asba.com/	Enterprise Business Conference - Breakfast with 1,000 business people, Phoenix Mayor Phil Gordon, Best-selling author, Michael Gerber, Economic Forecast from Dr. Lee McPheters, Small Business Administration Awards, 150 Expo Booths, Door Prizes	\$10,000
04/24/08	Maricopa	Raul H. Castro Institute - When: Thursday, April 24, 2008 - Reception: 5:30 - 6:00 p.m., Ed & Verma Pastor Plaza; Food and beverages served at reception. - Presentation: 6:00 - 7:00 p.m., Bulpitt Auditorium -- Where: Phoenix College, 1202 W. Thomas Rd., Phoenix, AZ 85013 -- http://www.pc.maricopa.edu/index.php?page=21&subpage=47307&quicksec=61967&subsec=97944	Raul H. Castro: Two Cultures, One Challenge - Documentary -- The Raul H. Castro Institute at Phoenix College proudly co-sponsors with the University of Arizona's Center for Latin American Studies, the documentary Raul H. Castro: Two Cultures, One Challenge directed by Sy Rotter and Luis Carlos Romero-Davis. The documentary depicts the life of Raul H. Castro as Judge, Ambassador and Governor, careers in which Raul H. Castro served with distinction. Highlights of these experiences are presented in this 28 minute video biography.	Part of Yearly Contract
04/25/08	Statewide	Arizona Chamber of Commerce - When: Friday, April 25, 2008 - 7:15 a.m. Shotgun Start - 12:30 p.m. Lunch -- Where: McCormick Ranch Golf Club, 7505 E. McCormick Parkway, Scottsdale, 85258 -- http://www.azchamber.com/	25th Annual Arizona Chamber Golf Classic with special guest Tom Chambers	Part of Yearly Contract
04/30/08	Statewide	Governor's Commission on Service & Volunteerism - When: Wednesday, April 30, 2008 - 11:30 a.m. to 1 p.m. -- Where: Phoenix Art Museum, 1625 N. Central Av., Phx.	7th Annual Governor's Volunteer Service Awards	\$0
05/01/08	Maricopa/East	East Valley Partnership - When: Thursday, May 1, 2008 - 11:30 a.m. to 1:30 p.m. -- Where: Arizona Grand Resort (formerly Pointe South Mountain Resort, 8000 S. AZ Grand Pkwy, Phx 85004 -- http://www.evp-az.org/	The Future of our Region: Promises & Perils of the East Valley & Northern Pinal County - The panel will discuss what the East Valley needs to do to meet future demographic shifts, global warming, infrastructure investments and what will be needed in terms of political will and capital to accomplish the developments envisioned. Names emailed 4/24/08.	\$1,500
05/01/08	Maricopa	Chicanos Por La Causa - When: Thursday, May 1, 2008 - Dinner at 6 p.m. -- Where: Sheraton Wild Horse Pass Resort, 5594 W. Wild Horse Pass Blvd., Chandler	39th Anniversary Dinner "A legacy of compassion; a future of opportunity -- Business Casual Attire -- Emailed names on 4/30/08	\$5,000
05/01/08	Maricopa	Chrysalis - When: Thursday, May 1, 2008 - 6 p.m. Cocktail Reception, 7 p.m. Dinner -- Where: Arizona Biltmore Resort -- http://www.chrysalis-shelter.org/home.htm	Chrysalis Honors . . . The Family - This year's honorees are the families of Gema & Paul J. Luna and Sue Glawe -- Emailed attendee list 4/30/08.	\$10,000
05/02/08	Maricopa	AWCCA - When: Friday, May 2, 2008, 7:30 a.m. Shotgun Start (Must start on time) -- Where: Camelback Golf Club, 7847 N. Mockingbird Lane, Scottsdale, 85253	16th Annual AWCCA Golf Tournament	\$2,500

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
05/02/08	Statewide	Arizona Nurses Association - When: Friday May 2, 2008 - 11 a.m. to 2 p.m. -- Where: Arizona Biltmore Resort, 2400 E. Missouri	Promise of Nursing for Arizona Luncheon - The Promise of Nursing for Arizona is a celebration of nurses and their everyday, extraordinary contributions. This event honors Arizona nurses and helps to maintain quality healthcare for patients in Arizona by offering scholarships to Arizona nursing students. Names emailed 4/24/08	\$2,000
05/02/08	Pima/Tucson	University Medical Center/SATNET - When: May 2, 2008 - Registration and lunch will commence at 11:30 a.m. and tee-off will be at 1 p.m. -- Where: Ventana Canyon, Tucson -- http://www.umcarizona.org/UMC/default.cfm	Golden Hour Golf Classic Tournament Judy turned in names.	\$10,000
05/03/08	Maricopa	Homeward Bound Benefit - When: Saturday, May 3, 2008 1 p.m. to 4:30 p.m. -- Where: The Arizona Biltmore Resort	A Derby Affair	\$700
05/03/08	Statewide	Arizona Opera - When: Saturday, May 3, 2008 - 6:30 p.m. Cocktails, 8 p.m. Dinner and Dancing -- Where: Arizona Biltmore Resort, McArthur Ballroom, 24th St. & Missouri, Phoenix -- http://www.azopera.com/	The Phoenix League of Arizona Opera presents Opera Ball 2008, La Traviata -- Black Tie Only emailed names 4/28.	N/A
05/07/08	Maricopa	Greater Phoenix Chamber of Commerce - When: 05/07/08 -- Where: Arizona Biltmore Resort McArthur Ballroom -- Registration 11:00 - 11:30 a.m.; Luncheon 11:30 a.m. to 1:30 p.m. http://www.phoenixchamber.com	Small Business Awards Luncheon (IMPACT Awards) honoring accomplishments of small businesses who have made an impact through community, innovation, or response to adversity, and will recognize the 2008 Small Business of the Year.	\$7,500
05/08/08	Statewide	60-Summits - When: Thursday, May 8, 2008 -- Where: Black Canyon Conference Center, Phx. -- www.60summits.org	AZ Leadership Summit to Prevent Work Disability - A 60-Summits project on Stay-at-Work/Return-to-Work -	\$10,281

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
05/09/08	Statewide	American Heart Association - When: Friday, May 9, 2008 - 8:30 a.m. Welcome (Coffee Served) 9 to 9:45 a.m. Optional breakout session #1 (choice of 1) 10 to 10:45 a.m. Optional breakout session #2 (choice of 1) OR 9 to 11:45 a.m. Heart Healthy Expo & Silent Auction viewing - Luncheon 11:45 a.m. to 1 p.m. -- Where: Westin Kierland Resort & Spa, 6902 E. Greenway Parkway, Scottsdale, AZ -- http://www.americanheart.org/presenter.jhtml?identifier=1200279&division=PMA008	Go Red For Women - The purpose of the Event is to benefit the AHA and advance its non-profit mission of fighting heart disease and stroke. The purpose of the Event is not to endorse or promote any product or service of Sponsor or of any third party.	\$6,000
05/14/08	Statewide	Eight, KAET-TV - When: Wednesday, May 14, 2008 - 11 a.m., Hall of Heroes (Exhibition of the nominee organizations) 12 p.m., Luncheon & Awards Ceremony -- Where: Camelback Inn, 5402 E. Lincoln Dr., Scottsdale 85253 - http://www.azpbs.org/bemore/	Be More Awards - Join us for the inaugural 'Be More Awards' luncheon and awards ceremony honoring the outstanding achievements of non-profit organizations -- SCF is an award sponsor for the 'Be More Brilliant Award.' -- Business Attire names sent 5/9/08	?
05/17/08	Maricopa	Body Positive - When: Saturday, May 17, 2008 - Dinner @ 6:30 p.m. - Where: Camelback Inn, 5402 E Lincoln Dr, Scottsdale, AZ -- http://www.phoenixbodypositive.org/index.html	2008 Night for Life - An HIV and Aids Research and Resource Center -- Black Tie Event names sent 5/8. add'l names sent 5/15	\$3,000
None	Maricopa/West	WESTMARC	West Valley Labor Force Study - FY 2008	\$5,000
05/22/08	Statewide	Arizona Woman Magazine - When: Thursday, May 22, 2008 - 11 to 11:30 a.m. Silent Auction, Registration & Networking, 11:30 a.m. to 1 p.m. Program & Luncheon -- Where: Arizona Biltmore Resort Frank Lloyd Wright Ballroom -- www.azwoman.azcentral.com	Who's Who in Business Awards & Luncheon	\$700
06/04/08	Pima/Tucson	Eller College of Management, The University of Arizona - When: Wednesday, June 4, 2008 - 7 a.m. to 8:45 a.m. Breakfast -- Where: Doubletree Hotel Tucson & Reid Park, Grand Ballroom, 445 S. Alvernon Way, Tucson	2008 Mid-Year Economic Outlook Breakfast - with Eller College economists Marshall Vest & Gerry Swanson	\$210
06/07/08	Statewide	Arizona Science Center - When: Saturday, June 7, 2008 -- http://www.azscience.org/index.php	Family Health Day	\$5,000

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
06/14/08	Statewide	Equality Arizona (Formerly Human Rights Campaign) - When: Saturday, June 14, 2008 - Cocktails & Silent auction @ 5 p.m., Dinner @ 6:30 p.m. -- Where: Fairmont Scottsdale Princess Resort 7575 E. Princess Drive, Scottsdale 85255 -- http://www.equalityarizona.org/	2008 Annual Awards Dinner - EA is the state's largest LGBT organization created to secure, protect & defend the rights & welfare of LGBT people in Arizona. BLACK TIE OPTIONAL. -- http://www.hrc.org/index.htm	\$15,000
06/18/08	Maricopa	National Association of Women Business Owners - When: Wednesday, June 18, 2008 from 11 a.m. to 1:30 p.m. -- Where: Hilton Squaw Peak Resort, 7767 N. 16th St., Phoenix 85020	Phoenix Chapter Desert Diamonds Awards Gala	\$2,500
06/18/08	Statewide	Audubon Arizona	Yearly Pledge	\$12,500
06/25/08	Statewide	Arizona Chamber of Commerce & Industry - When: Wednesday, June 25, 2008 from 11:30 a.m. to 1 p.m. -- Where: The Scottsdale Plaza Resort, 7200 N Scottsdale Rd, Scottsdale, AZ	Annual Meeting & Awards Luncheon	Part of Yearly Contract
06/30/08	Maricopa	Greater Phoenix Chamber of Commerce - When: Monday, June 30, 2008 from 8 a.m. until 9:30 a.m. - Where: Pointe Hilton Squaw Peak Resort, 7677 North 16th Street Phoenix, AZ 85020	14th Annual Legislative Wrap Up Event. This event celebrates the end of the legislative session and brings together key legislators for a panel discussion on: How decisions made affect the business community and What were the close calls in 2008	\$3,000
July, 2008	Statewide	Boy Scouts of America, Grand Canyon Council -- http://www.doubleknot.com/openrosters/view_homepage.asp?orgkey=62	Merit Badge Sponsorship Program - 2008 thru 2009	\$5,000
07/11/08	Statewide	Arizona Education Association - When: Friday, July 11, 2008 - Reception at 6:15 to 7 p.m. followed by dinner from 7:15 p.m. to 8:30 p.m. then 8:30 to 10 p.m. is a casino night social -- Where: Wigwam Resort, 300 Wigwam Blvd. Litchfield Park, AZ -- http://www.arizonaaea.org/	Casino Night @ AEA Leaders' Conference, Fundraising Gala	\$3,000

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
07/16-19/08	Maricopa	The Hispanic College Fund - When: Wednesday, July 16 thru Saturday, July 19 2008 -- Where: ASU-West, Phoenix, AZ -- The Hispanic College Fund has chosen the AGUILA Youth Leadership Institute as its Phoenix partner to help identify and recruit the student participants as well as coordinate the subsequent year-round educational programming. AGUILA is a Phoenix-based, nonprofit college access program for Latino/a youth that builds a support network so that students can successfully prepare for, apply to, and graduate from college. -- http://www.aguilayouth.org/news/HYS.asp	The Hispanic Youth Symposium - Each Hispanic Youth Symposium brings 200 underserved Hispanic students to a local college campus for a three-night, four-day program to change the way the students think about their educational and professional trajectories.	\$5,000
07/24/08	Statewide	Kids' Chance of Arizona - When: Thursday, July 24, 2008 - Cocktails 6 p.m. to 7 p.m. - Program begins @ 7 p.m. -- Where: Fiesta Inn, 2100 S. Priest Dr., Tempe AZ -- http://www.azkidschance.org/	Awards Banquet	\$7,500
08/21/08	Maricopa	Phoenix Business Journal - When: Thursday, August 21, 2008 - 7:00 a.m. to 9:30 a.m. -- Where: Arizona Biltmore Resort, Frank Lloyd Wright Ballroom, 2400 E Missouri, Phoenix - http://phoenix.bizjournals.com/phoenix/	2008 Health Care Heroes Awards - Keynote Speaker: Lieutenant Colonel Dawn Lake - Please join the Phoenix Business Journal along with Blue Cross Blue Shield of Arizona, Abrazo Health Care, Phoenix Children's Hospital, A.T. Still University, Delta Dental and The Plaza Companies as we honor the finalists and announce the winners of the 2008 Health Care Heroes awards at a celebratory breakfast	\$800
08/21/08	Maricopa	Greater Phoenix Chamber of Commerce - When: Thursday, August 21, 2008 - 11:30 a.m. to Noon is Registration & Networking, Noon to 1:30 p.m. is Lunch & Program -- Where: Arizona Biltmore Resort, 2400 E. Missouri Av., Phoenix -- http://phoenixazcoc.weblinkconnect.com/CWT/External/WCPages/WCEvents/EventDetail.aspx?EventID=1507	Phoenix Forum Luncheon - All's Fair: Love, War & Politics with James Carville & Mary Matalin - Washington's most famous political strategists & husband & wife team.	\$0

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
08/21/08	Flagstaff	Flagstaff Chamber of Commerce - When: 08/21/08 btwn 7:30-9:30 a.m. -- http://www.flagstaffchamber.com/	Good Morning Flagstaff Power Networking Breakfast - This event is a speed networking event that provides businesses the opportunity to meet dozens of new prospects in a matter of minutes. This facilitated networking event has proven to be one of the most popular among members, with general attendance at about 100 people. During the program participants will have the chance to "steal the spotlight" and highlight their business, win prizes, listen to community updates and be entertained all while enjoying a delicious breakfast.	\$750
08/25/08	Maricopa/East	Southwest Shakespeare Company - When: 08/25/08, 5 p.m. - 6 p.m. -- Where: Rehearsal space at the Mesa Arts Center, 55 E Main Street, Mesa -- http://www.swshakespeare.org/	"SHOW INTRO" for <i>As You Like It</i> -- This is a "behind-the-scenes" look at a local production. Show designers as well as the actors and directors, Director Richard Baird, recently named Best Actor in the Valley by the AZ Republic will be there to talk about their designs and concepts for the show. Refreshments will follow.	\$5,000
08/30,31 & 9/1	Flagstaff	Flagstaff Sunrise Lions Club - When: Labor Day Weekend -- Where: Downtown Flagstaff	Demolition Derby	\$100
09/05/08	Maricopa	Valle del Sol - When: Friday, September 5, 2008 - Noon to 2 p.m. - Where: Phoenix Convention Center-South Ballroom, 3rd St. & Jefferson, Phoenix -- http://www.valledelsol.com/pages/page.asp?pageID=26	18th Annual Profiles of Success Hispanic Leadership Awards Celebration	\$6,000
09/06/08	Maricopa	New Global Citizens - When: Saturday, September 6, 2008 - 11 a.m. - 2 p.m. -- Where: Tempe Marketplace -- http://www.newglobalcitizens.org/yfest2008.html	Y Fest Arizona 2008	\$2,000
09/06/08	Statewide	Special Olympics Arizona - When: Saturday, September 6, 2008 between 5:30 p.m. & 10 p.m. -- Where: US Airways Center, 201 East Jefferson Street Phoenix, AZ 85004 Located on the Southeast corner of 1st St & Jefferson in Downtown Phoenix http://www.soaaz.org/home/main.asp	Beauty of a Bonzer Event - Enjoy the cuisine of Outback Steakhouse. Bid on extraordinary auction packages. Rock into the night with Hall & Oates. All for the benefit of 6 deserving Valley charities: Alzheimer's Association, Cox Charities, For Those Without A Voice, The Real Gift Foundation, Southwest Autism Research & Resource Center, Special Olympics Arizona	Charitable Giving Budget

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
09/11/08	Tucson	Habitat for Humanity Tucson - When: Thursday, September 11, 2008 -- Where: Corazon Del Pueblo Development -- No pets allowed or children under the age of 16. -- http://www.habitattucson.org/	Building Freedom Day - Shift 1 - 6:30 a.m. to 9:30 a.m. -- Shift 2 - 9:30 a.m. to 12:30 p.m. -- Shift 3 - 12:30 p.m. to 3:30 p.m. -- For safety reasons, only 15 volunteers can work on one house per shift.	\$10,000
09/17/08	Maricopa	Organization for Nonprofit Executives - ONE - When: Wednesday, September 17, 2008 - 11:30 a.m. Meet & Greet. Noon Luncheon opening remarks -- Where: National Bank of Arizona Conference Center, 6001 N. 24th St., Phx 85016 -- http://www.oneaz.org/	Educational Luncheon	\$1,500
09/19, 09/20	Maricopa	Alliance Beverage Benefit Fund - When: Friday, September 19: High Steaks Shootout, 6:30 a.m. reg; 7:30 tournament starts; cocktails and lunch follow. Saturday, September 20: 6:30 a.m. reg; 7:30 tournament starts; 5:30 cocktail reception, 7 p.m. dinner. -- Where: Wigwam Resort, 300 W. Wigwam Blvd, Litchfield Park, AZ 85340 -- http://www.alliance-beverage.com/	Pioneer Classic Weekend & Golf Classic	\$3,500
09/24/08	Maricopa	Greater Phoenix Chamber of Commerce - When: Wednesday, September 24, 2008 - Time: 7:30 a.m. to 10 a.m. -- Where: Arizona Biltmore Resort, Frank Lloyd Wright Ballroom, 2400 E. Missouri, Phx -- http://phoenixazcoco.weblinkconnect.com/cwl/External/WCPages/WCEvents/EventDetail.aspx?EventID=1457	Economic Outlook 2009, Greater Phoenix Real Estate & Economy	Part of Yearly Contract
09/24-26/08	Statewide	National Association of Hispanic Firefighters - When: Wednesday, September 24 thru Friday, September 26, 2008 -- Where: Wyndham Hotel, 50 E. Adams St, Phx 85004 -- http://www.nahf.org/html/index.php	13th Annual International Training Conference - Hosted by: Valley Hispanic Bomberos -- The NAHF Annual National Convention and Training conference provides United States Firefighters, International Firefighters, Volunteer Firefighters and event participants a forum to facilitate training, educational development, fellowship, mentorship, recruitment, communication of safety alters, community outreach and public education.	\$10,000

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
09/25/08	Statewide	ASU, W.P. Carey School of Business - When: Thursday, September 25, 2008 - 11:30 a.m. to 1 p.m. -- Where: The Arizona Biltmore Resort, Phx. http://wpcarey.asu.edu/Spirit/	The Spirit of Enterprise Awards 2008 -- The Spirit of Enterprise Center is enthusiastically preparing for the 12th annual Spirit of Enterprise Awards. The Center will celebrate and honor businesses that embody Ethics, Energy and Excellence in Entrepreneurship.	\$3,000
09/26/08	Maricopa	Muscular Dystrophy Association - When: Friday, September 26, 2008 6 p.m. to 10 p.m. -- Where: Scottsdale Waterfront Trolley Bridge across from the Scottsdale Fashion Square	Taste of the Towne - Fine Wine & Food Tasting - Cocktail Attire Please - Parking available at Nordstroms & Waterfront garages. Entrance located next to Olive & Ivy.	\$2,500
09/27/08	Statewide	Arthritis Foundation-Greater Southwest Chapter - When: Saturday, September 27, 2008 - Begins @ 6 p.m. -- Where: Chaparral Suites Resort, Grand Ballroom, 5001 N Scottsdale Rd, Scottsdale - http://www.arthritis.org/chapters/greater-southwest/featured-event.php	Salute to Summer's End Event - An evening to benefit children with arthritis. -- Summer Cocktail Attire	\$2,000
09/27/08	Maricopa/West	Presented by: CareScape, Inc. benefiting 'Raising Special Kids' -- When: Saturday, September 27, 2008 - 6:30 a.m. - 8:15 a.m./Registration, Breakfast & Driving Range, 8:30 a.m./Shotgun Start, 1:30 p.m./Lunch, Auction, Door Prizes & Awards -- Where: Eagle's Nest @ Pebble Creek Golf Resort, 3645 Clubhouse Drive, Goodyear, 85395 -- Tournament Website: www.dandeliongolffclassic.com , Raising Special Kids Website: www.raisingpecialkids.org	Dandelion Golf Classic - Golfers will receive 18 holes of golf w/cart, range balls, golf shirt, breakfast, lunch, player tee prize bag, one drink ticket, one door prize ticket -- Format: Shotgun Start/Four person scramble/Two flights -- Prizes awarded for: 1st, 2nd, 3rd, & 4th place for each flight. On Course Competitions: Long drives, closest to pins, hole-in-ones	\$1,000
09/30/08	Maricopa	Crisis Nursery	Breaking the Cycle Annual Luncheon 2008 Video	\$1,000
10/01/08	Maricopa	Greater Phoenix Economic Council - When: Wednesday, October 1, 2008 - 5:30 p.m. -- Where: Arizona Biltmore Resort, 2400 E. Missouri, Phx. -- http://www.gpec.org/index.asp	GPEC Annual Dinner - GPEC will bestow the Outstanding Regional Contribution and Most Distinguished Service awards to those individuals at the event.	\$5,000

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
10/01/08	Pima/Tucson	Tucson Metro Chamber of Commerce - When: Wednesday, October 1, 2008 - 11:30 a.m. to 1:00 pm - State of Education luncheon -- Where: Tucson Convention Center -- http://www.tucsonchamber.org/2008/10/01/state-of-education-luncheon-a-community-conversation-on-k-12/	A Community Conversation on K-12 - State of Education in Tucson Event	\$600
10/02/08	Maricopa	The Centers for Habilitation - When: Thursday, October 2, 2008, Event will begin @ 6 p.m. That will begin the Taste of Tempe Marketplace and the raffle ticket sales. The movie starts at 7:30 pm. - Where: Tempe Marketplace Harkins Theater -- http://www.tch-az.com/	Harkins Theatre Movie Night @ Tempe Marketplace -- Harkins will hold a private showing of the movie "Ghost Town", starring Ricky Gervais, Tea Leoni, and Greg Kinnear. "He sees dead people...and they annoy him". Rated PG-13, it is a comedy about a man who "dies suddenly, but miraculously wakes up - with the ability to see ghosts. In conjunction with the movie, TCH will hold the Taste of Tempe Marketplace featuring participating restaurants within this new outdoor destination. During the Taste of Tempe Marketplace items will be available for raffle including two tickets to anywhere Southwest Airlines flies in the Continental US, a signed football by Cardinals WR Anquan Boldin, tickets to the November 8th race at PIR, and other gift baskets.	\$4,000
10/02/08	Maricopa	Phoenix Business Journal - When: Thursday, October 2, 2008 - 7:00 a.m. to 10:00 a.m. -- Where: Arizona Biltmore Resort, Frank Lloyd Wright Ballroom, 2400 E Missouri, Phoenix -- http://phoenix.bizjournals.com/phoenix/	SRP Economic Forecast 2009 - Housing market, credit crunch, energy costs--What's next for the economy? Featuring Don Reynolds, Nat'l Economist & Futurist; Dean Martin, AZ State Treasurer.	\$1,425
10/07/08	Statewide	ASU Foundation - When: Tuesday, October 7, 2008 - Time: Doors open at 7 a.m., Breakfast begins at 7:30 a.m. -- Where: The Ritz-Carlton, Phoenix, 24th St. & Camelback	Cesar E. Chavez Leadership Lecture - Introducing the publication AZ Workforce: Latinos, Youth & the Future - Keynote Speaker: Roberto Suro Founder and former director, Pew Hispanic Research Center, Professor, USC Annenberg, School of Journalism	\$15,000

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
10/09/08, 10/10/08	Statewide	Hispanic Women's Corporation - When: Wednesday, October 8 & Thursday, October 9, 2008 -- Where: Phoenix Convention Center, West Building, 100 N. 3rd St. -- http://hispanicwomen.org/default.asp? Luncheon info: 11:45 - 1:00 p.m. Friday, Phoenix Convention Center.	23rd National Hispanic Women's Conference - As the largest gathering of Latina's in the nation, the conference aims to motivate, educate and provide a prime opportunity to build lasting and beneficial relationships with other women and sponsoring organizations nationwide. Over the course of two days, HWC provides the opportunity to learn from over 50 renowned presenters who will address key topics in the areas of professional development, personal growth, wealth building and solutions to social issues Latinas face today. You can also learn more about the products, services and career opportunities of the major corporations and organizations across the U.S.	\$5,000
10/10/08	Statewide	Arizona Latino Caucus Foundation - When: Friday, October 10, 2008 - 6:30 a.m. Registration, 7:30 a.m. Shotgun Start -- Where: Vistal Golf Course, 701 E. T-Bird Trail, Phoenix	2nd Annual Golf Tournament - Format: 4 person scramble - Luncheon & presentation of awards immediately following the tournament in the Vistal Golf reception tents. Names sent.	\$1,000
10/11/08	Maricopa/East	Southwest Shakespeare Company - When: 10/11/08, 7:30 p.m. -- Where: The Mesa Arts Center, 55 E. Main Street, Mesa -- http://www.swsakespeare.org/	As You Like It' Play	See August 25, 2008 Event
10/11/08	Pima/Tucson	Arizona's Children Association - When: Saturday, October 11, 2008 6 p.m. cocktail Reception, 7 p.m. Dinner & dancing -- Where: JW Marriott Starr Pass Resort, Tucson	Celebrate Arizona's Children Gala	\$1,750
10/16/08	Maricopa	Downtown Phoenix Partnership - When: Thursday, October 16, 2008 - 5 p.m. to 9 p.m. -- Where: Phoenix's new Downtown Sheraton Hotel -- Experience Downtown Phoenix and enjoy entertainment by local street performers, live music and more.	5th Annual "State of Downtown!" -- A welcoming reception at Phoenix's new Downtown Sheraton Hotel kicks off an exciting evening. There you will enjoy drinks and hors d'oeuvres from downtown eateries. There will be extensive media and press coverage and an expected record turnout of more than 800 people.	\$5,000

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
10/17,18/08	Maricopa	Arizona Latino Research Enterprise - When: 8:30 a.m. to 5:30 p.m. Friday, October 17, 2008 & 9 a.m. to 11:30 a.m. Saturday, October 18, 2008 -- Where: Wyndham Phoenix Hotel, 50 E. Adams, Phoenix	The Fourth Annual ALRE Town Hall - Politics, Purpose, Progress - Business Attire Please	\$5,000
10/18/08	Maricopa/West	City of Goodyear - When: Saturday, October 18, 2008 - 5 p.m. to 8 p.m. -- Where: 3151 North Litchfield Rd. Goodyear, AZ - Goodyear Community Park -- http://www.goodyearaz.gov/CurrentEvents.asp?EID=1309	GAIN - Getting Arizona Involved in Neighborhoods Event -- The GAIN Event is a fun, fill and educational event where residents have the opportunity to meet their neighbors. The event features children's games, food & opportunities to learn about City services.	\$1,000
10/18/08	Flagstaff	Flagstaff YMCA - When: Saturday, October 18, 2008 - 6 p.m. Dinner & Auction -- Where: High Country Conference Center	YMCA Sports Celebrity Night, An Evening with Ruben 'Hurricane' Carter	\$1,000
10/18/08	Maricopa	United Phoenix Fire Fighters - When: Saturday, October 18, 2008 Time: Cocktails: 5:30 p.m., Dinner: 7:15 p.m. -- Where: Mountain Preserve Reception Center, 1431 E. Dunlap Av., Phx 85020	2008 Fire Fighters Ball - This is a semi formal event to raise funds for Fire Fighters Charities that stays right here in our community! Event will include a sit-down dinner, silent auction, live music by "Affinity" and dancing	\$10,000
10/22/08	Statewide	Arizona HR Executive Forum - When: Wednesday, October 22, 2008 - 8 a.m. Continental, Networking breakfast, 8:30 a.m. General introductions, 9 a.m. to 11:30 a.m., Program -- Where: Desert Willow Conference Center, 4340 E. Cotton Center Blvd, Phx, 85040 -- http://www.azhref.org/	What Got You Here won't Get You There: Helping Successful Leaders Get Even Better - Special Guest, Marshall Goldsmith	\$2,500
10/23/08	Statewide	Chicanos Por La Causa - When: Thursday, October 23, 2008 - Dinner time: 6 p.m. to 9 p.m. -- Where: Wyndham Hotel, 50 E. Adams, Phx. -- http://www.cplc.org/events/event_details.aspx?id=11	10th Annual Esperanza Latino Teachers Awards	\$3,500
10/23/08	Statewide	Anti-Defamation League - When: 10/23/08, Reception @ 6:15 p.m., Program & Dinner @ 7 p.m. -- Where: Camelback Inn, 5402 E. Lincoln Dr., Scottsdale -- Business Attire	Jerry J. Wisotsky, Torch of Liberty - Michael M. Crow, President, Arizona State University is being honored and presented with the Jerry J. Wisotsky Torch of Liberty Award.	\$5,000

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
10/24/08	Statewide	Latino Future Magazine - When: Friday, October 24, 2008 - 10:30 a.m. check-in and networking, 11:45 a.m. Program & Luncheon - Where: Camelback Inn, JW Marriott Resort & Spa, 5402 E. Lincoln Drive, Scottsdale -- http://www.latinofuture.com/	2008 Hispanic Small Business Awards	\$1,000
10/24/08	Pima/Tucson	La Frontera Center, Inc. - When: Friday, October 24, 2008, 6:30 p.m. to 11 p.m. -- Where: Rancho Valle Milagro, Tucson	40th Anniversary, Ruby Masquerade Ball	\$800
10/09/08	Maricopa	The Wellness Community - When: 09/08, 10/08, 12/08 -- http://www.twccaz.org/	Volunteer Opportunities = Teen Cancer Support programs or Kid2Kid/Family2Family support programs, the June 7 Cancer Survivor Day, the September 2008 Grand Opening of the Teen & Family Center, October's Porch Party and December's Hope Café.	\$5,000
10/25/08	Maricopa	The Wellness Community - When: Saturday, October 25, 2008 - Dinner, 6:30 p.m. -- Where: TWC, 360 East Palm Lane, Phx 85004 -- http://www.twccaz.org/	6th Annual Porch Party Dinner - The mission of TWC is to provide free cancer education and support programs for those whose lives have been touched by cancer and their loved ones.	\$3,000
10/25/08	Maricopa	Ronald McDonald House Charities of Phoenix - When: Saturday, October 25, 2008 - 6 p.m. -- Where: Camelback Inn Resort, 5402 E. Lincoln Dr., Scottsdale, 85253 -- http://www.rmhcphoenix.com/	Annual Fundraising Gala, Silent Auction during Hosted Cocktail Reception, Live musical entertainment, Live Auction & raffle drawing -- http://www.rmhcphoenix.com/ - Contact Eric Spicer @ 602-798-5092 w/questions	\$15,000
10/29/08	Statewide	Children's Action Alliance - When: Wednesday, October 29, 2008 from 11:30 a.m. to 1:30 p.m. -- Where: Hyatt Regency, 122 N. Second St., Phx -- http://www.azchildren.org/	10 Annual Through the Eyes of a Child Luncheon - Phoenix City Councilman Greg Stanton will be honored with the Jacques Steiner Public Leadership Award for Children and Don Budinger, chairman and a founding director of the Rodell Foundations, is being awarded the Horace Steele Child Advocacy Award.	\$5,000

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
10/29/08	Statewide	Arizona Business Magazine - When: Wednesday, October 29, 2008 - 6 p.m. to 8 p.m., Evening Reception -- Where: Ritz-Carlton, 24th St. & Camelback, Phx http://www.azbusinessmagazine.com/ab/index.html	3rd Annual Economic Engines of Arizona Awards Reception	\$3,750
10/30/08	Maricopa/West	WESTMARC - When: Thursday, October 30, 2008 - 5:30 p.m. Reception, 7 p.m. Dinner/Awards -- Where: Renaissance Glendale Hotel, 9495 W Coyotes Blvd, Glendale, AZ 85305 -- http://www.westmarc.org/ -- Business or Cocktail Attire (Masquerade Costume Optional)	16th Annual Best of the West Awards - The purpose of the Best of the West Awards is to recognize outstanding contributions to the image, lifestyle and economic development in Western Maricopa County. This region includes the cities, towns and areas of Avondale, Buckeye, El Mirage, Gila Bend, Glendale, Goodyear, Litchfield Park, Peoria, West Phoenix, Sun City, Sun City West, Surprise, Tolleson, Wickenburg and Youngtown.	\$10,000
11/01/08	Maricopa/East	Avnet - When: Saturday & Sunday, November 2 & 3, 2008 -- Where: Tempe Sports Complex -- www.avnet.com/softballclassic/	Sixth Annual 16" B2B Softball Desert Classic -- TV show will air Saturday, December 6th on 3TV KTVK!	\$5,000
11/06/08	Pima/Tucson	Tucson Metro Chamber of Commerce - When: Thursday, November 6, 2008 - Doors open at 11:30 a.m. & the program begins at Noon -- Where: Tucson Convention Center	Arizona Athletics (UA) Winter Kick Off Luncheon	\$5,000
11/08/08	Maricopa	Friends of Animal Care & Control - When: Saturday, November 8, 2008 - 6 p.m. starts a No Host Bar & Silent Auction - 7 p.m. starts Dinner 8 p.m. starts Hero Awards Program - Where: JW Marriott Desert Ridge Resort, Phoenix -- Dress: Cocktail Attire	6th Annual Hero Awards - FACC, a 501 (c)(3) non-profit organization whose mission is to end euthanasia of healthy and adoptable dogs and cats in our community by raising funds to support the special programs of Maricopa County Animal Care & Control	\$3,000
11/11/08	Statewide	Arizona Small Business Association - When: Tuesday, November 11, 2008 - 6 p.m. to 9 p.m. -- Where: Phoenix Convention Center, 100 N. 3rd St., West Wing - Halls C and D -- http://www.asba.com/events/details.aspx?EventID=4232	3rd Annual Arizona Companies to Watch Awards - Celebrating Second-Stage Entrepreneurs	\$10,000

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Event Date	Geographical Location	Organization/Committee	Project/Event Name	SCF Sponsorship Amount
11/12/08	Maricopa	Sojourner Center - <i>When:</i> Wednesday, November 12, 2008 - Noon to 1 p.m. -- <i>Where:</i> JW Marriott Desert Ridge Resort - 5350 E Marriott Dr, Phoenix	7th Annual Hope Luncheon - Since 1977, Sojourner Center has provided shelter and support services to thousands of individuals affected by domestic violence. As the nation's largest domestic violence shelter, Sojourner Center is a tireless advocate for domestic violence victims and survivors.	\$2,500
11/12/08	Statewide	Arizona Educational Foundation - <i>When:</i> Wednesday, November 12, 2008 - Program begins at 11:30 a.m. -- <i>Where:</i> Camelback Inn, Scottsdale	2009 Teacher of the Year, Silver Anniversary 1983-2008 -- The Arizona Educational Foundation was founded in 1983 by key leaders in business and education who believed that improving public education was too great a task for school districts to do alone. With this in mind, they set out on a joint partnership that continues to positively impact public schools today	\$1,000
11/14/08	Maricopa	Arizona State University & Tempe Chamber of Commerce - <i>When:</i> Friday, November 14, 2008 - Cocktail Reception & Silent Auction @ 6:30 p.m., Dinner & Dancing @ 8 p.m. -- <i>Where:</i> The Buttes Resort, 2000 Westcourt Way, Tempe -- http://www.tempechamber.org/	FestDevil Homecoming Gala - Cocktail Dresses & Tuxedos or Business Suits.	\$2,750
11/18/08	Maricopa	Greater Phoenix Chamber of Commerce - <i>When:</i> Tuesday, November 18, 2008 - 11:30 a.m. to Noon is Registration, Noon to 1:30 p.m. is Lunch and Program -- <i>Where:</i> Sheraton Phoenix Downtown Hotel	Phoenix Forum presents Lisa Ling - As the first woman host of National Geographic's "Explorer", Ling has covered the looting of antiquities in war-torn Iraq, investigated the increasingly deadly drug war in Colombia, examined the complex issues surrounding China's one-child policy, the phenomenon of female suicide bombers and the hidden and dangerous culture inside American prisons. For the Oxygen Network, Ling is hosting a series very important to her that explores the challenges that girls face worldwide: called "Who Cares About Girls." In addition, the "Oprah" show has been sending Ling all over the world to cover vitally important stories that much of the world chooses to ignore.	Part of Yearly Contract
11/21/08	Pima/Tucson	American Heart Association - <i>When:</i> Friday, November 21, 2008 - <i>Where:</i> JW Marriott Starr Pass, Tucson	Sixth Annual Go Red for Women Luncheon - <i>When:</i> Friday, November 21, 2008 - <i>Where:</i> JW Marriott Starr Pass, Tucson	\$1,500
12/03/08	Statewide	Arizona Small Business Association - <i>When:</i> Wednesday, December 3, 2008 - VIP Reception is 11 a.m. to Noon - Luncheon 7 Awards Ceremony is Noon to 1:30 p.m. -- <i>Where:</i> Arizona Country Club, 5668 E Orange Blossom Ln, Phoenix, AZ 85018 -- http://www.asba.com/events/details.aspx?EventID=4233	Eagle for Enterprise - Honoring Arizona Legislators Who Soar for Business	\$2,500
12/14/08	Maricopa	Beatitudes Center DOAR - <i>When:</i> Sunday, December 14, 2008 - 2:30 p.m. -- <i>Where:</i> Hyatt Regency Scottsdale @ Gainey Ranch	18th Annual Poinsettia Tea	\$1,500
04/08-12/08	Statewide	Special Olympics Arizona	Summer Games	\$10,000
				\$592,541

Budget for 2009 is the same as 2008. No increase in dollars. == \$600,000